Our Query: If your library does home delivery, we would appreciate learning from you!

We currently offer a Books by Mail service where we select books for patrons who are homebound and send them books via USPS.  We would like to expand our home delivery service, perhaps making it faster, and open to anyone.

Do you restrict the number of items a patron can have delivered? If so, what are your restrictions? How do you do this without spending a lot of staff time? We are on Sierra and use BiblioCommons, and believe that restricting items may cost us more staff time than simply delivering what patrons want when they want it.

If you do not restrict the number of items patrons can receive, are you overwhelmed with requests and power users?

How do you deliver your items? Staff? Volunteers? Outside delivery company? How do you organize items for streamlined delivery?

How do you get items returned?

If folks respond to me off list, I will compile. Apologies if this has been covered recently.

**Responses**

**Saranac Clarksville District Library**

We have provided home delivery in our two small communities for many years (long before I became director in 2014).

We do have a policy that we only provide delivery within the village of Saranac or Clarksville (the villages where our buildings are) however we have bent the rules a bit because as small libraries, we often get to know our patrons and understand their challenges in getting to the library so we have gone outside the village in the past for long time patrons that we knew were no longer able to get in and did not have a family member that could get to material to them.  But for anyone we don't know, we do restrict to the Village- more for safety of staff members.

We do not restrict how many items they can get but most are very respectful and only get what they can read in a couple of weeks.  We check out the items, delivery them and then pick up items that they are done with.  We always have them call us when they are ready for us to bring more items to them and they have always been flexible if we aren't able to make it that day due to staffing issues.  Staff are the ones who deliver.

One thing that was learned early on in this program is that we will only delivery library material.  We had people wanting our staff to stop and pick up items at the store (mainly cigarettes, etc).  We had kind hearted staff who did pick these items up and then the patron didn't have the money for the items.  So you might want to stipulate that you will only deliver library material and make sure both the patron and anyone delivering the item understands this!

Honestly, this doesn't get used all that often but we do have patrons that we know have struggles and we always offer this to them.  We recently had a long time patron fall, we offered these services to her family members who brought back her books once she is home again.  The patrons always love that we are willing to provide this- they often feel that we are going out of our way to assist them and are very gracious.

**Taylor Community Library**

Our library does home delivery (we started it when the pandemic hit). During the pandemic, we had quite a few residents take advantage of it and we delivered 3 days per week.  Since then, our numbers are much lower and we only deliver 2 days per week.  We deliver during a set 2 hour window on Tuesdays and Fridays (12-2). Our deliveries are made by volunteers and are limited to our city only.  The only qualification a person needs to utilize home delivery is they must be a library card holder in good standing, and they must reside within the city limits. Items must be delivered to the home address on file with their library card. We do not enter any homes or apartment buildings. Items are left on the front porch or in the vestibule of an apartment complex. Also, we will deliver books, DVD's, audio books, etc. but not tech kits (computers, hot spots).  We do not pick up returns. We have a drop box available 24/7 and items must be returned there.

**Hamburg Township Library**

We deliver our homebound items.  We deliver the first Friday of each month.  Patrons are allowed up to 15 items.  We don’t have a lot of homebound patrons, so I do the delivery myself each month.  Although we give library cards out to anyone, this service is limited to Hamburg Township residents only (we are a township library).  It’s been working very well for us for the past 7 years now.

**Troy Public Library**

If your library does home delivery, we would appreciate learning from you!

We currently offer a Books by Mail service where we select books for patrons who are homebound and send them books via USPS.  We would like to expand our home delivery service, perhaps making it faster, and open to anyone.

Do you restrict the number of items a patron can have delivered? If so, what are your restrictions? How do you do this without spending a lot of staff time? We are on Sierra and use BiblioCommons, and believe that restricting items may cost us more staff time than simply delivering what patrons want when they want it. **We do not restrict the number of items a patron can have delivered, but we do have a delivery rotation that limits patrons to one delivery every three weeks. So, we tell our patrons to only request the number of items they can read in three weeks. We deliver every Thursday between 11-2—depending on the week, our Aide might visit between 1-6 homes. We keep track of who is ready for a new delivery using a Word document—it’s pretty simple.**

If you do not restrict the number of items patrons can receive, are you overwhelmed with requests and power users? **No, it’s very doable.**

How do you deliver your items? Staff? Volunteers? Outside delivery company? How do you organize items for streamlined delivery? **We have a PT Outreach librarian who coordinates the deliveries with the outreach patrons, and our PT Aide delivers them on Thursdays. For now, it hasn’t been overwhelming for our Aide, but if we do end up adding more patrons to the point that we need more help, I’ll look into using volunteers. I know other libraries have had great success using volunteers, but I feel more confident having a trained and vetted staff person vising people’s homes and having access to private patron info.**

How do you get items returned? **We pick the items up when we bring by another delivery.** **If patrons choose to stop getting deliveries because their situation changes and they’re able to come to the library, or they just no longer need deliveries, they can request a one-time pickup.**

**East Lansing**

I was the Circulation Supervisor at the East Lansing Public Library when the pandemic hit & we launched a Books By Mail service. We also used Sierra and Bibliocommons. The system we worked out was a bit time consuming, but I think it worked pretty well for our patrons.

We sent everything via US mail. We had a postage meter, which made adding the charges a lot easier. If we didn't have that, I would have created an account with [stamps.com](http://stamps.com) & shipped that way, it's a lot cheaper in terms of fees. We used some library-specific book shipping bags we purchased from Demco (or somewhere similar), and that really determined what we could ship, and how often. Each of our bags could hold 3-4 hardcover books; we asked patrons to only order one "shipment" at a time. Most patrons thought 3 books at a time was enough, so that was never really an issue. The size of the bag dictated what we could send out - picture books were too big, and we didn't really get any requests for other childrens' books. We included a return shipping label in the bag; when patrons were done with their books, they zipped them back in the bag, put the return label on it, and shipped it back to us.

We offered several avenues for patrons to submit their requests. The easiest way was for them to call or email us. Some just reserved their own books online. The difficult part was knowing when their books were ready. We tried configuring the patrons' accounts in Sierra to note that they were Books By Mail, but we never figured out a way to make that information print out on a hold slip. What we ended up doing was creating a gmail account just for Books By Mail- patrons used it to communicate with us, and staff used it to communicate with each other (e.g. "I mailed Joe Patron these two titles today").

 **Maud Preston Palenske Memorial Library**

Do you restrict the number of items a patron can have delivered? No. Our delivery bags can accommodate about 10-12 books but generally our patrons request about 6.

If so, what are your restrictions?

The only restriction I can think of is new books. We generally avoid new books as our home-bound patrons have a 6 week check out period. They can receive books, DVD's, magazines and music.

How do you do this without spending a lot of staff time?

I am the sole staff member handling about 8-10 patrons.  I usually work on a list of items to pull for each patron immediately upon return of the tote of books.  The Reading Preference Guide and notes patrons leave for me help with the decision.  Once items are pulled, checked out and put into the patron tote, the bag goes into the holds area until our volunteers come for the pick up.  I put an old fashioned peel and stick due date in each book with patron initials only (for privacy).  This helps when pulling books in the future.

We are on Sierra and use BiblioCommons, and believe that restricting items may cost us more staff time than simply delivering what patrons want when they want it.  We flag our patrons as "shut-ins" in our circ system which gives them the extended checkout time and flags other staff to see me with questions. We have anywhere between 8-10 patrons using this service at one time.  Right now, I am the only staff member that handles this service.  IF it were to expand, we would need additional staff and volunteers. We deliver one time per month, set dates and times.  Our patrons call me or another staff member for requests or leave a list in their tote bag.  We have two volunteers that have background checks completed that handle the delivery of the tote bags, setting up new library cards for those that do not have one.  Our volunteers deliver a tote of new books and swap it for the tote of previous books at each delivery date.

We use clear zippered totes with a pocket on the front.  Laminated contact information such as patron name, address and phone is slipped into the pocket.  These totes can be washed if needed easily.

**Responses below are from Southgate Veterans Memorial Library (compiled from previous query a couple years ago)**

Homebound Delivery Service Compilation Original email: My library is investigating the possibility of delivering library materials to homebound patrons specifically using volunteers to drop off items. I know there are libraries in Michigan that are already doing this, so I am hoping people will share what they are doing already... So if you do homebound services, I would greatly appreciate it if you would answer some questions about this service. Also, tips, advice, examples of forms and policies for this service are also welcome.

1. What criteria does a person need to meet to be considered homebound? Do you require proof?

2. How do patrons initiate a request? Do they call the library and speak to a specific person? Or can anyone help them? Is there a form that needs filled out?

3. Do they check items out on their account at the library before you leave the library and they have to show you their card when you drop the items off? Or do you use their card to check the items out when you arrive at their home?

4. If you are using volunteers to drop off items, are there any liability issues with volunteers using their personal vehicles to do library work? Do you carry extra insurance to cover this?

5. Screening volunteers: I am assuming you do background checks on potential volunteers for this program, is there anything else you do to screen them?

6. If using volunteers, what type of training do you provide them?

7. Anything else that I should be aware of?

**Kalamazoo Public Library**

Here at the Kalamazoo Public Library we have our ViaMail service. We use the mail to send things out, but I can answer the first three questions.

1. Our application form asks the patron to let us know why they cannot come to the library. It is usually because of age or disability. We don’t require proof. I can respect the reasons why someone might require proof, but it seems intrusive.

2. We just put that online application up for patrons to fill out. Before they would call our ViaMail library assistant. The online application works better. Patrons fill it out and creates a record that gets emailed to our ViaMail LA. He then processes it and will save that application to refer to if needed. We do have that one dedicated staff person who processes patron’s applications, material requests, etc. If they need a little assistance when they get the occasional in depth reference question, they’ll work with a librarian to answer it.

3. Materials are checked out to the patron before they are mailed out. And 7. We send our materials out in special zipper mailers, though I forget where we ordered ours at the moment. If you’re doing delivery this might be an issue, other than maybe a bag would make it easier to keep materials in one place. We also mail out everything that we would circulation to patrons who come into our buildings: books, CDs, and DVDs.

**Maud Preston Palenske Memorial Library in St. Joseph**

We have a service that was started about 5 years ago called Library2You. We have an application, reader preference guide etc. Our volunteers do the actual delivery. Patrons get an extended check out period and do not have to show proof of a disability or anything to utilize the service. We deliver to new mothers, seniors, those who are homebound due to a recent surgery etc. I will attach some of our literature for you. The service was approved by the library board. We ordered clear zippered totes. Each patron has 2 totes so as one is delivered, another is picked up and now sent directly to quarantine. Each tote has a laminated card with patron name and address as well as a laminated book marks with delivery times and dates. We are a small library and right now have about 6 patrons using the service and two volunteers. I hope this is helpful.

Do you check the items out before they leave the library? Yes, I check out the items (6 per patron) for the 6 week checkout period then put them in the individual bags for our volunteers to pick up. I will try to attach a picture of the bags. We chose clear plastic bags with a pocket that can have the patron name inserted and they wash well if needed. About $10 on Amazon. We have two bags per patron so that one bag is delivered with new books and the volunteer takes the bag with returns. We also provide a laminated book mark with delivery dates for a 6 month period that the patron can keep at home.

Do you need to see the library card before they can be given the items? No. Especially now during COVID. Many places only allow us to drop the bags at the door of the retirement community/nursing home. Even for those in their own homes we do not ask for library cards. Our volunteers go out and do a home visit to meet the patron, set them up with a library card if needed and find out their reading preferences. We mark each patron as "Library to You" in our circulation system as a note, then change them to "shut-in" status which gives the 6 week check out period automatically.

Are there any liability issues with volunteers using their personal vehicles to do library work? Do you carry extra insurance to cover this? I have never been told there is a liability issue. Our board approved all of this and I guess that is a question for our director, Stephanie Mason.

I am assuming you do background checks on potential volunteers for this program, is there anything else you do to screen them? Do you provide the volunteers with any type of training? Yes, we do background checks on all of our volunteers. And yes, we provide training albeit bare bones training.

**Auburn Hills Public Library**

I oversee the Home Delivery Service for the Auburn Hills Public Library, and, as I mentioned from my Brandon email, I've been trying to get one started at my other job at the Brandon Township Public Library. I studied disability theory extensively in my undergrad, so these services are near and dear to my heart.

1. What criteria does a person need to meet to be considered homebound? Do you require proof? Auburn Hills uses the following criteria to guide our home delivery structure: Auburn Hills residents must be unable to drive temporarily or permanently, or must be serving as a primary caregiver to qualify. There are no age restrictions. The criteria is intentionally vague, so most applicants are decided on a case-by-case basis. I've found that a number of the residents I serve still have valid driver's licenses but have impaired vision or mobility, so I think limiting it to people who have a doctor's note or proof of their inability to drive forces some patrons who really should not be on the road to get on the road. In these situations, patrons may say something like "I don't drive in the winter" or "I don't drive around new areas"--usually I find that's due to a visual impairment and I typically deliver to their address year-round. Growing up, my grandmother always said things like this, and she's been unable to read text since she was 25 but somehow still has her license. She says she cheats on the eye exams. Additionally, I deliver to a few residents who don't own a car. Our public bus system is irregular to say the least, so I consider them qualified for the service. No primary caregivers or youth have requested materials through home delivery yet, but I like to include that in our qualification--especially in light of at-risk populations during COVID-19. I try to avoid senior-specific language like "senior"/"elderly"/"retired." Quite a few of my patrons don't consider themselves to be seniors yet. I also avoid the word "homebound" for similar reasons.

2. How do patrons initiate a request? Do they call the library and speak to a specific person? Or can anyone help them? Is there a form that needs filled out? I have provided our senior center and local senior living facilities with the attached tri-fold and paper application. We also have a virtual application. More often than not, though, seniors stop to chat and enroll when I make a delivery nearby, or they call for assistance. Because signatures are not required, I have no issue filling out the form for the patron over the phone. If a relative calls to fill out the form on their behalf, I always call the patron after to ensure they truly want to be enrolled in the service. Even so, I find I have several patrons who have enrolled but still have yet to use the service; my best guess is that they like knowing that they can use library materials if they wanted to.

3. Do they check items out on their account at the library before you leave the library and they have to show you their card when you drop the items off? Or do you use their card to check the items out when you arrive at their home? I'm not sure what your catalog situation & circulation policy is like, but I've had to make a few changes over the years. Now, I check items out for the patron before I leave the library. I don't require a form of identification when I drop the items off. No one has ever tried to scam us or anything before. The one exception to this is the pop-up library event I hold monthly at a nearby senior living facility.

4. If you are using volunteers to drop off items, are there any liability issues with volunteers using their personal vehicles to do library work? Do you carry extra insurance to cover this? I haven't encountered any issues with this. I recommend talking to your attorney to see what you might do to mitigate potential liability issues. I also recommend talking with your local chapter of Meals on Wheels to get their take on liability concerns, since their volunteers run deliveries on a more regular basis than most library home delivery systems.

5. Screening volunteers: I am assuming you do background checks on potential volunteers for this program, is there anything else you do to screen them? I typically explain the work that will be expected of them before we run the background check. I encourage patrons to let me know if they ever have an issue with their volunteer, but so far, nothing has come up.

6. If using volunteers, what type of training do you provide them? I typically provide volunteers with the attached training resources. I ask them to read the materials over and let me know if they have any questions. I also encourage them to bring the emergency guide with them on deliveries just in case. So far, we have had no incidents. I explain to volunteers that many of our home delivery patrons like to socialize and may offer gifts or invite them into their homes. I tell them to stay at their comfort level; if they are uncomfortable entering a patron's home, they can say that the library asks volunteers to refrain from entering homes, and I will back them up on that statement if needed.

7. Anything else that I should be aware of? I usually have 3-4 volunteers who deliver to 2-3 patrons each; however, with holidays, vacations, illness, and rescheduling, I often find myself making at least a few monthly deliveries. I think you might find volunteers more reliable if you partner with your local MOW or another local volunteer program. Unfortunately, we have yet to build up such partnerships here. In addition to occasional deliveries, I also host a weekly pop-up library at a living facility down the road. I tried establishing a pop-up library at a second facility, and while it did help spread the word about our program (we had 8 new applicants), each patron ultimately just wanted specific titles or genres. The pop-up library works at the place down the street from us because the patrons there are browsers. Of course, right now, I haven't been hosting pop-up libraries or volunteers. I am currently the sole deliverer for our home delivery patrons, and we have seen less interest in deliveries during COVID-19 than we did before; however, those who want deliveries REALLY want deliveries. I currently do contactless delivery while wearing a mask and face shield. I use hand sanitizer after picking up bags of returns. It's likely a lot more work than mail delivery services, but I love being able to build connections with patrons outside the library, and I know they love the social benefits of our home delivery model. I also have several patrons who check out 5-10 large print books, 10-15 DVDs, and/or 5-10 audiobooks monthly, which isn't easy to do on a mail delivery system. I usually make about 13 deliveries each month on the second or last Tuesday of the month, but we have over 25 patrons enrolled in our delivery program. I only work about 12 hours a week at Auburn Hills, but I'm able to manage the program well despite that limitation. If you have any other questions about how our system operates, feel free to send me a message or give me a call. If you're interested in partnering with your local MOW program, I'd also recommend talking to Jo Ann Andrews at Clarkston Independence District Library; she's been a wonderful resource to me as I develop a proposal for the Brandon Township Public Library. Victoria Phelps Clinton-Macomb Public Library Here at Clinton-Macomb, I talked to a lot of libraries about homebound delivery a couple years ago, but we literally just started a Library by Mail program (like, finally managed to send out packages last week, and haven’t received any back yet.) And it hasn’t been introduced to our wider community, we did a soft roll-out with the senior residences in our service area. So I feel like I don’t have a lot to offer just yet! But, I’d be happy to talk to you in a month or so when I have experience!

**Hudson Library**

We are small. We have always offered delivery service. They call, we pick and delivery when we have a moment. We do call them and tell them we are on our way. Mostly elderly or recent hospital stays. We know everyone....so far. One of staff usually drops them off on her way home. If she has a few, I let her go a little early and deliver them. Otherwise we just see who has a little break and send them out when the books are ready.

**Bloomfield Township Public Library**

We do offer Library by Mail. It has been a program here now for about 10 years, or so. Wow, time flies! Anyways, when a staff member speaks to a patron, and the patron indicates that they have issues coming into the library, or if they have had surgery or if their neighbor will be in to pick up the item or just about any other indicator that we pick up on, we offer our library by mail program.

1. An application is filled out by a staff member, could be a circulation clerk or a youth or adult services librarian.

2. Application is verified. If this is a long standing patron, with a library card, the application is sent to circ for updating. If this is a new patron a Pledge of Responsibility is sent out, and upon return a library card is created.

3. A letter is sent to the patron welcoming them to the program. This letter also has the rules, ie. Only items that fit in the bag will be sent, no MelCat requesting, and some other things.

4. Patron items are collected to be sent out either by patrons calling in or on a continuing basis i.e. they like certain authors and we send the books out upon return of the last books sent.

5. We send audio books, DVDs, music cds, magazines, large print, just about everything. We have bags in two sizes. A pocket is on the outside of the zippered bag, and the address postcard goes in that. The patron turns it over and sends it back. All postage is prepaid. We put a small zip tie on each bag when sent out, and we include one for the journey back to our library. We have had a few lost items in the mail, and a couple times an audio book cd has been left behind. We just call and ask them to include it in the next shipment. The mail has been running slow here, and a new LBM patron was calling us daily looking for an answer about her items. It took about a week or more for the items to arrive, and now we tell new patrons, things may be slow. Also, I try to go through all the applications twice a year to make sure our patrons are still with us. This can be a sad task. I search for obituaries, home sales on Zillow and look for them in Reference USA, and I make lots of phone calls to make sure they still need the service. Sometimes a patron moves, and that is okay. I did a check after our Stay Home Stay Safe order was lifted, and we had lost four patrons during that three month period. You just want to keep up with it. All in all it works out well.

**Baldwin Public Library**

1. What criteria does a person need to meet to be considered homebound for your program? Do you require proof? We do not require proof. If a patron (or caregiver) initiates Home Delivery service, we accept for any reason, even if it isn't articulated. We do ask that patrons either use the library in person or as a Home Delivery patron. If we notice a lot of in person checkouts or returns, I call that patron and discuss whether or not Home Delivery still is necessary for them. Home Delivery is great and convenient, but I tell them that the benefits of the service are exclusively for patrons who are unable to visit in person (with all the other good benefits of browsing, etc). On occasion though, a Home Delivery patron may get a ride to the library, and that is fine. We also allow short stints on the Home Delivery service, for surgical rehab for example.

2. How do patrons initiate a request? Do they call the library and speak to a specific person? Or can anyone help them? Is there a form that needs filled out? Patrons (or their caregivers or children) initiate the request. If they have a lot of questions, or want to talk to the person who runs Home Delivery, I'm happy to talk with them. We do have a form (attached) and most of our seasoned librarians feel comfortable filling out the form themselves and forwarding it on to me.

3. Do you check items out on their account at the library before you leave the library and does the patron have to show you their card when you drop the items off? Or do you use their card to check the items out when you arrive at their home? We exclusively use USPS to deliver materials. We check the items out to the patron (4 weeks) and package the materials in a large all-weather mailer. We use a postal machine to pay media rate for both the outgoing and returning postage. This mostly works well, though we are trying to track a package that tracking shows ended up in Massachusetts! Home Delivery patrons do not accrue fines.

4. If you are using volunteers to drop off items, are there any liability issues with volunteers using their personal vehicles to do library work? Do you carry extra insurance to cover this? We do not use volunteers in this way at this time.

5. Screening volunteers: I am assuming you do background checks on potential volunteers for this program, is there anything else you do to screen them?

6. If using volunteers, what type of training do you provide them?

7. Anything else that I should be aware of? We use the notes field in our ILS to keep track of what types of things the Home Delivery patron likes to read. We also turn on Reading History automatically for these patrons. Some patrons I automatically select and send books when a mailer is returned. Some patrons place their own holds and we ship these when they are triggered. We also send out books from MeL to Home Delivery and we send all our items (DVDs, TV series, magazines, etc) except for Hot Picks. Many of the Home Delivery patrons request Large Print titles, and I purchase this collection (with a healthy budget!) often with specific Home Delivery patrons in mind. A large part of our community is wealthy and the Home Delivery readers are sophisticated, educated, and well read library users! I do tend to be a bit more hands on with them, allowing space for longer chats on the phone and writing them notes from time to time too. Many of our Home Delivery patrons are in senior residences or assisted living and most of those places have restricted visitors. They are LONELY right now and many have expressed gratitude that we have resumed sending books as they continue to quarantine. This service is demanding on time, but well worth it!!!

**Items below are from the Howard Miller Library (compiled from previous query)**

**Oak Park Public Library**:

Down in Oak Park, we started a homebound delivery service, Words on Wheels, last year, and it’s going pretty well, and was not terribly labor intensive or complex to start up, other than the borrowing policy, which my director created after reviewing similar policies. But there are a lot of details to figure out, like with any new service. Locating the patrons will take time, and lots of marketing.

1. Eligibility: there is a Medicare eligibility statement, I believe, that states in general terms who would be considered homebound. It’s worded in such a way that we do not have to ask what their medical condition is, only if they’re unable to leave the house without significant assistance. Obviously, this is not a convenience service for those who are otherwise mobile but who do not wish to drive to us.

<https://link.edgepilot.com/s/baf0b244/7FpNSrNox0mhtr-ffH-cRA?u=https://www.medicareinteractive.org/get-answers/medicare-covered-services/home-health-services/the-homebound-requirement>

2. I personally deliver the items to patrons doors or their apt complex. We wanted to coordinate with a bus that takes seniors around, but it was too much coordination and complexity. Oak Park isn’t that large, and it’s easy for me to just drive around.

3. We created a google sign up form that I post from time to time that allows people to either sign themselves up, or they can call, and we’ll do it over the phone. If they need library cards, we do that by phone, too. We’re not worried about out of city residents, since I have to deliver the card to them anyway. I also have a short intake form I use internally as I call around before I deliver. The most time consuming part is calling 2 days before delivery and getting everyone’s requests in, and books pulled from circ.

4. There is coordination required with circ so homebound patrons’ items are never returned if they’ve not picked up within a week, since it’s on me to deliver them. I deliver twice each month. I also give them lots of extra borrowing time, and these patrons are never charged late fees. Nobody has a different patron code, we just don’t make them pay and waive the fines if they’re late. Circ always has a full list of these patrons. We have a small staff, and if you do, too, I would deliver just once a month. It is a lot of coordinating, but the actual delivery here is a short amount of time; Zeeland might be much more spread out…

5. I made and posted lots of graphics to social media and printed flyers that went to the 2 main apt buildings, which are mostly seniors, here in Oak Park. That and word of mouth has helped a lot.



**St. Clair County System:**

We have been doing this for years at the St. Clair County System. Below I will outline our answers to those questions:

My main concern is how to keep everything organized. What tools do you use to keep track of your homebound patrons and when their items are due? Do you have a set delivery schedule, or do you try to be flexible about when you deliver items?

-We do a double-print of items that go out. 1 sheet is for the patron and another is for the file. We have files on every user. They get books when they want or select weekly, monthly, etc. and tell us how many they want. We view what subjects or authors the like and select accordingly.  We also add “HC” to patrons when setting them up as Home Connection users so that we can easily see, and get , those users differentiated from others. For example, I would be Howard/ HC, Mary. Attached I have the application we use, policy we follow and the master sheet of users. Delivery schedule is based on what they want, but usually weekly.

Most of the patrons I work with do not request specific books. I work with them to find out what types of materials they are interested in. Based on what they tell me, I choose some books that I think they will like. If your library does this, how do you keep track of the books you have given them in the past?

-The double sheet is not infallible but it is a good guide. We do tend to give new books which also helps. Of course, as libraries we do not want to have a list that others could view as this could be a breach of privacy. We only have the paper version as our IT does not want something that can be hacked and viewed by outsiders.

 So far, I have been keeping notes for myself, but I would like it to be accessible to other library staff in my absence. I think some sort of spreadsheet would work the best for what I am getting at, but I am having a difficult time visualizing it. If, for example, you use Excel, do you have a tab for each patron?  I would really appreciate if anyone could share an example of how they keep track of this information.

-I would be happy to talk if you need more info. We deliver via USPS, and if it is a LP title (14 font or higher) it can be shipped free via “matter for the blind” but those are always the last items to be sent so be aware of that. We have special purple bags we use that are very sturdy. We give 7 weeks checkout as we have sloooow mail here.

Howard, Mary mhoward@sccl.lib.mi.us

**Roseville Public Library:**

I recently inherited my library's outreach program and since it works pretty well (so far, at least), I thought I'd share the procedures.

The Roseville Library strictly sends materials through the mail, for now. We utilize the post office's media mail program which uses heavy-duty media mailer pouches to get materials to and from patrons. The library pays for the outgoing mail. We have a prepaid account at the post office to pay for return postage. They occasionally send us balance notifications and the director adds funds to the account when necessary.

Interested patrons are initially given a form to fill out regarding what types of materials they are interested in, formats, favorite (and not favorite) authors and genres, how many materials at one time they'd like, and how often they would like a delivery as well as contact info. I usually give them a call because it's a lot of information.

The library identifies outreach patrons in our system. We change their contact email to ours so I can get any overdue notices that may occur. Our outreach patrons have an extended due date of four weeks (rather than the usual three) and receive only Roseville items.

I use a combo paper and spreadsheet filing system to keep track of everything. A file folder gets started for every person when they begin the program. This includes their original reading preferences form, contact info, address labels for mailing pouches, and rating forms. Each person gets a rating form included in their packet of materials. It shows their name, library card number, due date, and a list of included items along with a spot for them to rate their books. I keep a copy of it at the library and jot down the date the packet was mailed. When the items come back, I replace my copy of the rating form with the one filled out by the patron. I adjust their reading preferences as needed and start the process again. I usually wait until a packet returns to send another but there are a couple of people who get things on a (sort of) regular basis.

Reading logs and ratings are kept for each person in a spreadsheet. They live in the library's shared drive so all have access. This is where I keep track of what has already gone out to the patron. It's pretty basic in that I list the author, title, and rating given by the patron (from the rating sheet in the packet). If the person is a prolific reader (one person has read over 1000 books!), I also keep a tab listing possible titles to send. I try to also update reading preferences there to help out anyone that has to jump in if I'm not there.

Not too many problems have popped up. The main issues have actually been getting our packets back from the post office but a quick call over there usually solves the problem.

The library tries to advertise the outreach program in as many ways as possible including our newsletters, flyers, community mailings, other area organizations, and social media. We also have flyers near our checkout area in case someone would like to share the information with others that can't make it to the library.

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**Westland Library:**

1. Our library has had a homebound service for roughly a decade. I'm the third person to be head of the service, and I've been doing it for a few years now and streamlined it to what it is now!
2. Our patron count fluctuates due to the age demographic our service often serves. Right now, our count is seventeen patrons, but I've had as many as twenty-two! I haven't had to limit the number of patrons served yet, but I encourage you to ensure that your staff and volunteers aren't put in a position where they can't provide quality services.
3. As for our liability, we have a volunteer driver indemnity/hold harmless agreement that volunteers must sign. I attached a copy of our agreement—it's the second page of the document. As for staff, the library assumes that the employee's insurance (Regardless of whether it's through the library or another party) will cover it.

As for additional information and advice, I would offer the following advice:

* Get your process organized before you start advertising. Patrons often have many questions, so knowing who will be selecting materials, how they are selected, etc., is important, especially with the elderly population.
* Start small! Only advertise at your library, to begin with, so you're not overwhelmed with potential applicants or starting with a large number of patrons. However, if you need more interest, feel free to reach out to religious organizations, community centers, or assisted living facilities to see if there's interest.
* Find someone passionate about helping the community and comfortable with outreach to be the coordinator/face of the program on behalf of the library.

Katelin Smith (she/her/hers, they/them/theirs)

Adult Services Librarian | Homebound Coordinator

William P. Faust Public Library of Westland

**Howard Miller also provided a compilation to a related question about keeping track of patron delivery information**

-A few libraries suggested that I check to see what is available through my ILS, as they sometimes have outreach modules available. These modules obviously vary, but they include things like setting patron preferences, maintaining reading histories, creating wishlists, etc. The two systems that were mentioned were Biblionix Apollo and Polaris Leap, but other systems also probably have this available.

-Several libraries keep track in Excel. For these libraries, the general best practice seems to be maintaining a tab for each patron individually. These libraries basically track the same information listed above.

-For other libraries, it works best to keep this information as a "note" in the patron's record in their ILS.

-A few libraries also have a paper copy. Every patron gets a file with their original request form, a copy of the items that have been checked out, and a comment form, etc. This is usually in combination with some kind of digital records (ie, Excel).

-One library suggested putting "outreach" in the patron's library card record as part of their name. So, for example, I would be Jullianne Outreach Novetsky.

-Another really good idea is changing the email notifications for items to a library staff member who is in charge of/part of outreach so that they can renew the items or contact the patrons when they are due.

-Some libraries have set delivery schedules (generally if they have small programs), and some are more based upon patron request. All of the libraries do make room to be as flexible as possible. 🙂

-Word of mouth advertising seems to be very helpful. Also, contacting senior centers/retirement homes.

-Some libraries use staff for delivery, some use volunteers, and a few use a combination of the two. Some libraries have staff using their own vehicles (if they don't have one for the city/library). This is obviously dependent on your resources.

-Some libraries send items by mail. One recommendation is using heavy-duty media mailer pouches that are available at the post office. Libraries who send items by mail do have to pay postage, but sometimes they have accounts pre-paid with their local post office. Patrons generally have return postage included.

-Most libraries extend due dates until a month (if your items are usually three weeks). Generally, items by mail are sent out when the previous item is sent back.

-Comment forms are helpful to include with each delivery, so that you can be sure you are selecting materials that your patrons enjoy.