

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?
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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.

Thank you,

Steve

Steve Maesen | Circulation Manager

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.

Claire Gillespie

Maud Preston Palenske Memorial Library

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!

Sincerely,

Meghan Mott (she/hers)

Outreach Librarian

Clinton-Macomb Public Library

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.

Joann @ Hudson Library

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.

I hope this helps. Let me know if you need any more information. I'm happy to help.

Karrie

Karrie Yukon

Adult Services Librarian

Bloomfield Township Public Library

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!!!

Sarah Bowman
Adult Services Librarian
Baldwin Public Library