

# Homebound Program ToolKit

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Libraries have a long tradition of providing outreach to underserved populations and are committed to providing Universal Access (UA) for individuals in the communities they serve. North Texas Library Partners (NTLP) supports this practice and strives to help libraries develop programs and services which are accessible to all, even people who are unable to travel to the library. It is hoped that this ToolKit will provide useful information for libraries wishing to develop, improve, or expand library services to homebound individuals.

## About this ToolKit

This ToolKit was developed from data collected over the course of a year-long Homebound Project. Funded by a 2011 Special Projects Grant from the Texas State Library and Archives Commission (TSLAC), NTLP partnered with three public libraries to develop, promote, execute, and evaluate homebound delivery service in each community. It is hoped that the lessons learned from the 2011 Homebound Project will be useful to libraries of all sizes wishing to develop or expand outreach programs to homebound individuals in rural, suburban, and urban settings.

Outreach to homebound individuals is a complex and evolving library service. While this ToolKit aims to be as thorough as possible, there are undoubtedly other practices and service models our pilot projects were not able to explore.

NTLP graciously thanks the staff and administration from the three Homebound Project pilot libraries—Alvarado Public Library, Denton Public Library, and Haltom City Public Library—for their commitment to serving homebound individuals and their willingness to share what they have learned with NTLP and other libraries. The following people were instrumental in developing and expanding homebound services for each pilot library:

- Sara Bracht, Outreach Librarian, City of Denton, Texas
- Leanna Cowan, Library Director, Alvarado Public Library
- Allison Long, Outreach Librarian, Haltom City Public Library
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# Planning Library Services for Homebound Individuals

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## I. Introduction to homebound services

This section of the ToolKit is designed to provide a general overview of homebound services and to lay the foundation for planning a program that is right for your community. The approach is broad-based and expansive, encompassing a wide range of possible service directions from which to choose. Libraries may decide to adopt a narrower definition of homebound criteria than is presented here, based on their organizational goals and the needs of their communities.

### Why homebound library services?

A successful homebound program takes time to develop and involves significant commitment of time and resources to thrive. Recent economic times have dealt a blow to libraries, which are struggling to maintain service levels and keep up with technological changes with fewer staff and reduced budgets. How, then, can a library justify devoting the time and resources to serving a small subset of its population? Consider the following:

- People with disabilities have the same right to access library programs, materials, and services as all other members of a library's community.
- Libraries are grounded in the tradition of providing unfettered access to information and have taken on the challenge of making our buildings, materials, and electronic resources accessible for everyone.
- Providing outreach to homebound individuals takes accessibility a step closer to achieving Universal Access (UA).
- While homebound people represent a small portion of our communities, this number is growing steadily:
  - Our population is aging.
  - People are living longer and surviving diseases and injuries that previously would have been fatal.
  - Extended military conflicts mean that more veterans are returning home with one or more disabilities.
  - Most people will experience temporary or permanent disability at some point in their lives.
- Serving this growing demographic is a way for libraries to remain relevant to their communities.
- Those who cannot easily leave their homes are often the people who have the highest need for access to library materials and services.
- Homebound programs often involve partnerships with other organizations, volunteer groups, and service providers, which increases a library's visibility and promotes goodwill between organizations.

## Who is homebound?

### Qualifying conditions

The term *homebound* may invoke an image of an elderly person in frail health; however, people of all ages and backgrounds may find themselves unable to easily leave their homes. Broadly defined, a person may be considered homebound if he/she meets one or more of the following conditions:

- He/she has difficulties leaving home.
- He/she is not usually able to leave home without assistance.
- He/she should not leave home unless accompanied by a responsible person.
- When he/she leaves home, it must be to get medical care or for short, infrequent reasons such as getting a haircut, attending religious services, etc.
- He/she leaves the house once a week or less.
- He/she is confined to home for medical reasons.
- He/she cannot afford a vehicle and lives in a community which does not offer mass transportation, or one in which the mass transportation routes do not stop near the library.
- He/she lives in long-term or short-term health facilities where group transportation is the norm.

### Statistical and demographic information

The homebound represent a diverse group of individuals who receive benefits from many different agencies, organizations, and caregivers (both formal and informal). Finding quantitative data to determine the number of homebound people is challenging, as the circumstances affecting the ability to leave one's home are varied across the demographic spectrum. Some people are homebound on a temporary basis as they recover from an illness, accident, surgery, or difficult pregnancy. Even caregivers of the critically ill may find it difficult to leave home, and do so only to take care of pressing needs. Furthermore, many people who meet the service criteria do not necessarily self-identify as being homebound. Together these factors create a complex, variable, and somewhat indefinable demographic; however, the needs in our communities do exist, and libraries are committed to serving homebound individuals.

### Age-related issues

The aging U.S. population is one indicator that the need for homebound services is significant and will only increase. A 2010 [report](#) by the Federal Interagency Forum on Aging-Related Statistics reveals some startling facts:

- In 2008, over 39 million people were over age 65 and by 2030, this number is predicted to grow to 72 million. These aging baby boomers are living longer with the older Hispanic population expected to grow the fastest.

- The number of men who are veterans age 85 and over is projected to increase from 400,000 in the year 2000 to 1.2 million by 2010. Veterans have a higher percentage of functional limitations in activities of daily living and a greater likelihood of having any disability than non-veterans.
- Between 1998 and 2006, 10-12% of men and 17-19% of women over 65 reported clinically relevant depressive symptoms. Those who experience depressive symptoms often experience higher rates of physical illness, greater functional disability, and higher utilization of health care resources.
- Watching TV was the activity found to occupy the most leisure time (slightly more than 50%) in adults 55 and over. Americans age 75 and over spent a higher percentage of leisure time reading, thinking and relaxing than those 55-64. Socializing and communicating declined from 13% for ages 55-64 to 8 percent for 75 and over.

The scientific community is beginning to collect relevant data on aging that will be useful to libraries serving aging populations. In 2009, The [National Health and Aging Trends Study](#) (NHATS), a new resource for the scientific study of functioning in later life, was launched. A related resource, [National Study of Caregiving](#) (NSOC) will collect and disseminate data on caregivers. It is hoped that these research initiatives will help libraries assess needs of the homebound in the future.

### **Mental health-related issues**

People with mental illnesses often find a safe haven and access to information in public libraries, but what happens to those whose conditions keep them from leaving their homes?

Mental health conditions such as depression, obsessive-compulsive disorder (OCD), and anxiety-related disorders also affect the ability of otherwise healthy people to leave their homes. Often these conditions remain undiagnosed or undisclosed due to the stigma surrounding mental illness. The trend of de-institutionalization in recent decades means that more people who suffer from mental illness are living alone and isolated, frequently without treatment or family support. A 2009 [report](#) by the National Institute of Mental Health found that panic disorder, a severe form of anxiety, affects 6 million Americans. Approximately one third (2 million) of these have repeated and severe panic attacks that are very debilitating and result in the person being unable to leave their home.

Libraries have long expressed a commitment to underserved populations, including the mentally ill. Providing homebound services to this population should be considered.

### **Disability-related issues**

Many people find themselves homebound on a permanent or temporary basis due to physical disability. According to a U.S. Census Bureau [report](#) released in 2008, 54.4 million Americans, about 1 in 5 people, reported some level of disability in 2005. Among those with a disability, 35 million, or 12% of the population, were classified as having a severe disability.

The U.S. Census Bureau [report](#) on disability revealed that 6.4% (11,414,508) of non-institutionalized populations between 16 and 64 reported difficulty going outside the home, rising to 20% (6,795,517) for those over 65.

While these figures are staggering, they do not include people who live in care facilities or institutions or people with short-term conditions that temporarily make it difficult to leave their home.

### **Transportation-related issues**

A 2003 Bureau of Transportation Statistics [report](#) found that:

- Nationally, almost 15 million people in this country have difficulties getting the transportation they need. Of these, about 6 million (40 percent) are people with disabilities.
- More than 3.5 million people in this country never leave their homes. Of these, 1.9 million (54 percent) are people with disabilities.
- About 560,000 people with disabilities indicate that because of transportation difficulties, they never leave home.

With the recent economic downturn, more and more people find themselves unable to afford a vehicle. While many cities provide mass transit, the library, the would-be travelers home, or both may not be within walking distance from the transit routes, thus perpetuating the inaccessibility of the library. Most rural communities do not provide mass transportation. As public libraries often provide resources to job seekers, information about social services, and other relevant topics, it is critical that this demographic have access to library services.

Additionally, some people have had their driving privileges suspended or revoked. Losing the right to drive is particularly devastating to an otherwise healthy person, reducing his or her ability to lead an active life. Homebound library services are of the utmost importance to this demographic and can restore their ability to participate in society and increase their quality of life.

### **Other groups to consider**

Other categories of people which may be considered homebound include parents of multiples, parents or caregivers of someone who is disabled or critically ill, children who temporarily qualify for homebound education services, and people under house arrest.

Although difficult to quantify, the need for library services to these individuals is evident. Libraries have traditionally reached out to underserved populations. Finding a way to reach those who cannot come into our buildings is a natural extension of library service for people who need it most.

(Sources for this section are listed in [Appendix B-Additional Resources](#).)

## II. Determining the needs of your community

Successful library programs are usually deeply tied to the needs of a library's community; homebound programs are no different. Before beginning to plan the details of your program, it is beneficial to analyze and identify the unique social landscape of the area your library serves.

### Statistics and demographics

A good place to begin is by looking at the demographic makeup of your community. The following resources will help you in this task:

- Library reports – Your Integrated Library System (ILS) provides a good snapshot of who is using your library. Depending upon what information you gather and store, reports drawing on patron data may reveal age, zip codes, resident and non-resident status, etc. Reports drawing on circulation data may reveal trends in formats that are useful to homebound planning; for instance, has Large Print usage increased?
- City reports – Municipalities often provide demographic information on their website. If not, other city departments such as economic development, parks and recreation, and senior centers may have relevant data.
- Local school districts and supporting organizations may provide data such as socioeconomic class, age, race, among others. Schools also provide educational services to homebound students.
- Regional Councils of Government (COG) and Metropolitan Planning Organizations (MPO) often provide a concise snapshot of demographics by region. [The National Association of Regional Councils](#) provides a listing by state and region.
- [U.S. Census](#) (2000 and 2010), released every 10 years, provides the most comprehensive demographic data.
- [American Community Survey](#) (ACS) is an ongoing survey that provides data annually which is used to determine funding for programs and services. ACS includes data on age and disability.
- [AGing Integrated Database](#) (AGID) is a query-based system developed by the Administration on Aging (AOA) which allows data extraction from multiple resources, including the ACS, U.S. Census, State Program Reports, to name a few. You may either view charts by state or create your own custom queries.

(See [Appendix B – Additional Resources](#).)

### Transportation and infrastructure

The ability of a person to get to and from the library varies across communities. There are many transportation and infrastructure questions to consider when determining the accessibility of a library to its community:

- Where is the library located? Is it nestled within a residential area, or part of a shopping or municipal complex? Are there residential facilities, senior housing complexes, hospitals, apartments, or community centers nearby?
- Does your community offer mass transit, and are the routes within a short walking distance to the library?
- Are there transportation options—both free and for a fee—for seniors and/or people with disabilities in your area?
- Do residential facilities transport groups of homebound individuals into the library for visits or programs?
- What size is the geographical area served by your library? Is your community considered rural, suburban, or urban? Is the area sparsely or densely populated?

### **Community organizations and institutions**

Identifying organizations in your area which serve homebound individuals is a productive endeavor and should be done early in the planning process. These organizations are serving the demographic you are trying to reach and often are willing to partner with the library in some way. If your library is new to serving homebound individuals, these partner organizations may provide insight, guidance, and even proactive involvement in your homebound program.

Knowing what services exist for homebound residents also prevents duplication of effort and allows you to identify gaps in service. Look for the following organizations in your community:

- Charitable organizations, civic groups, local AARP chapters, and other non-profits which serve elderly, homebound, or people with disabilities
- Hospitals, rehabilitation facilities, medical complexes, treatment centers for cancer, dialysis, etc.
- Religious institutions, such as churches and mosques, often have groups which visit members who are homebound, ill, or recovering from surgery
- Support groups for caregivers and for people with disabilities
- Veterans Affairs offices or hospitals, VFW halls, and other organizations which serve veterans
- Schools for students with disabilities
- Short- and long-term residential facilities
- Correctional facilities and juvenile detention facilities
- Colleges and universities with programs in healthcare and social work
- Businesses which serve the target demographic such as barbers, beauty schools, home health care, banks, insurance agencies, and attorneys
- Nearby libraries which have outreach programs

### **Other methods of gathering information**

City and library surveys, focus groups, community meetings and staff brainstorming sessions may yield information useful for assessing the needs of your community.



### III. Delivery models for library homebound programs

Most homebound library programs involve delivering physical library materials to people who cannot come into the library. It is acknowledged that homebound services may include electronic access to information resources, such as downloadable audio- and e-books, but the focus of this ToolKit is on the physical delivery of library materials such as books, media, magazines, etc. There are two major program models for delivering physical library materials: in-person delivery and by-mail delivery.

#### In-Person Delivery

Many libraries choose to deliver materials to homebound individuals in person. Under this model, library staff, volunteers, or individuals from a partnering organization transport materials to and from homebound individuals and/or groups on a regular basis, using private vehicles and/or library-owned vehicles. In-person delivery programs have the following benefits and challenges:

Benefits	Challenges
<ul style="list-style-type: none"> <li>Provides social interaction as well as library materials for individuals who often lead very isolated lives</li> </ul>	<ul style="list-style-type: none"> <li>Requires a significant investment of staff and/or volunteer time to make deliveries and/or manage the delivery process</li> </ul>
<ul style="list-style-type: none"> <li>Increases the library’s visibility in its community and promotes the library to a “new” community</li> </ul>	<ul style="list-style-type: none"> <li>Involves some risk to the safety of library staff or volunteers making deliveries</li> </ul>
<ul style="list-style-type: none"> <li>Promotes good will between the library and other organizations which may provide volunteers or other support to the program</li> </ul>	<ul style="list-style-type: none"> <li>Limitations such as geography, staff time and other constraints on delivery area</li> </ul>
<ul style="list-style-type: none"> <li>Facilitates a more personal level of service between the library and the homebound individual</li> </ul>	<ul style="list-style-type: none"> <li>Materials may not be delivered as quickly or as frequently as patrons may like</li> </ul>
<ul style="list-style-type: none"> <li>May reach homebound individuals who would not feel comfortable navigating a by-mail delivery process</li> </ul>	<ul style="list-style-type: none"> <li>May be more vulnerable to budget or staff reductions than by-mail delivery</li> </ul>
<ul style="list-style-type: none"> <li>Enables outreach to groups in long- and short-term living facilities, senior centers, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Potential for delivery schedule interruptions when outreach staff or volunteers are unavailable</li> </ul>
<ul style="list-style-type: none"> <li>Allows library staff or volunteers to verify first-hand that the homebound person is eligible for services</li> </ul>	<ul style="list-style-type: none"> <li>Challenges to forming partnerships with organizations serving a broader area due to limited delivery area</li> </ul>

In-person delivery models are most appropriate for libraries serving a limited delivery area. The library can either use existing geographic or municipal boundaries (such as the city limit) to define the area of service, or may impose a unique boundary based on community needs and/or staffing capabilities (such as stating that delivery is limited to those living in a 10 mile radius of

the library). Keep in mind that it is easier to expand the boundary a delivery area than to reduce it. Therefore, a library just beginning homebound services may wish to start with a small area to test the market, solidify policies and practices, collect sample statistics for planning and/or grant-writing purposes, and facilitate smooth integration with library operations.

The ideal homebound delivery person has a passion for outreach services, is comfortable interacting with individuals with disabilities of all types, has an affinity for working with elderly people, and is able to work with little supervision. This person needs to be physically able to lift bags of books in and out of a vehicle and to push heavy book trucks, if group outreach is planned. It is recommended that a job description be developed, interviews conducted, and regular evaluations given for both outreach staff and volunteers. See [Appendix A](#) for a [sample job description](#).

### **In-person delivery using library staff**

Libraries may find doing face-to-face outreach with library staff is a rewarding and value-added service to provide for their communities. Libraries have a long tradition of providing outreach services and may already be doing outreach to schools, adult and child daycare centers, recreation centers, etc. The following questions are useful for libraries planning to use library staff to deliver material to homebound participants:

- Does the library have sufficient staffing levels to make regular outreach visits?
- Can homebound outreach be combined with existing outreach programs (to schools, daycare centers, correctional facilities, etc.)?
- Will outreach staff use their own vehicles or a vehicle provided by the city or library? Will mileage be reimbursed or fuel purchased by the library or city? Does the city have any special requirements or certifications for staff operating city vehicles?
- If using existing staff, does this person(s) have the skill set and passion for making face-to-face deliveries to homebound individuals? What impact will adding homebound responsibilities have on that person's existing job duties and tasks?
- If hiring new outreach staff, how is the position funded and is the program sustainable if funding is reduced or stops altogether?

### **In-person delivery using volunteers**

Homebound programs have the potential to create meaningful volunteer opportunities for individuals who wish to be involved with library services. Members of the library board, senior boards, and library friends groups may be very interested in volunteering to assist with homebound programs. Keep in mind that even programs which use volunteers for materials delivery will need significant input from library staff or administration to manage the process, oversee the volunteers, establish and maintain community partnerships, promote and market the service, and evaluate the success of the program. The following questions are useful for libraries planning to use volunteers to deliver library materials to homebound participants:

- Does the library already have volunteers interested in helping with homebound delivery?

- Who will interview, hire, train, and manage the volunteers? How will managing this process impact existing job duties and responsibilities?
- Will volunteers deliver alone or in tandem with library staff, or both?
- Will volunteers use their own vehicles, and if so, will they be reimbursed for mileage?
- If a government vehicle is to be used, does the city or county transportation policy allow volunteers to operate that vehicle?
- In addition to delivering materials, will volunteers also participate in pulling materials, registering new patrons, and performing circulation functions such as checking items in and out? Will these activities compromise the library's privacy policy?

### **In-person delivery through agreements with outside organizations or agencies:**

It is tempting to assume that organizations which deliver meals, provide home health care, or make regular visits to homebound individuals will be willing and able to deliver library materials to their clients during the course of their regular visits. Agreements of this nature seem intuitive and mutually beneficial; however, it is important to remember that other organizations have their own mission, vision, and primary service goals to accomplish. While delivery of library materials by outside agencies or organizations may be feasible, NTLP found that that community partnership most often involved cross-promoting services to each other's clients, rather than actual delivery or fulfillment of homebound services. The extent to which an organization would participate also varied greatly between organizations and did not necessarily translate from organizations in one community to sister organizations other communities. Tips for developing community partnerships to market homebound services are included in the [Marketing, Promotion, and Community Partnerships](#) section of this ToolKit.

If the library finds an organization willing to go beyond basic marketing and promotion, a Memorandum of Understanding (MOU) between the organizations defining the scope of the relationship and expectations of service is recommended. The MOU should include rights and responsibilities of each organization, methods and frequency of materials delivery, steps for evaluating the relationship, and a process for quality control. The MOU should be evaluated and renewed at least annually, with meetings or other communications scheduled more frequently.

Things to consider when forming partnerships for the fulfillment of library homebound programs:

- How will the relationship fulfill the mission and goals of the library's homebound program?
- How will the relationship benefit the partnering organization's mission and goals?
- How will the cost of missing or damaged materials be handled?
- How will the homebound recipient understand whom to contact about materials selection, general question or concerns, or library account issues?

### **Tips, best practices, and expectations for in-person delivery**

Delivering materials in person to homebound individuals or groups can be a rewarding experience for everyone involved. Unless your library is already engaged in some type of outreach, it can also be intimidating, confusing, amusing, and perplexing, at least in the early

stages of program development. The following section is made up of tips, insights, pitfalls, challenges, and best practices relevant to libraries planning on delivering materials in person.

### **Delivery schedules**

Establishing days and frequency for deliveries is recommended. While it is tempting to start a new homebound program delivering materials based solely upon demand of your early clients, this practice may not be sustainable as your program grows, and trying to impose a delivery schedule later may cause stress and dissatisfaction among homebound participants.

Establishing a general delivery schedule is easier for the library to manage, is more workable when using volunteers, and sets reasonable expectations for homebound participants. Patrons also benefit from knowing which days to expect deliveries. That being said, delivery schedules should also be somewhat flexible based upon patron needs. For instance, the library may deliver on Tuesdays and Thursdays each week, but allow patrons to select a weekly, biweekly, or longer frequency of deliveries. Keep in mind that patrons may have periods of illness, surgeries, or family events which take them out of the delivery cycle for a length of time.

### **Materials selection**

While some of your homebound patrons will want to search your library's online catalog and make requests for specific materials on their own, many will either want assistance selecting materials or may even prefer to have staff select materials on their behalf. The reasons for this are varied and include low comfort-levels in using technology, lack of computer or Internet connection, physical or cognitive challenges, and sheer preference. The library's website may be difficult to navigate, especially for patrons using assistive technology. Having a variety of selection tools in place will increase patron satisfaction and facilitate smooth delivery.

If possible, bring a tablet or laptop with a wireless Internet card along on homebound visits to aid in the selection process. Many patrons enjoy the camaraderie of selecting materials from the online catalog with outreach staff or volunteers "driving" the computer.

Other patrons appreciate a written list of books, movies, or music from which to choose. For homebound individuals, this is the equivalent of browsing for material. Reader's guides, new book and movie lists, and other reader's advisory tools are incredibly useful in homebound programs. Remember to print these lists and tools in large (at least 16 pt), sans serif font, and update them regularly.

Develop reader's profiles for your homebound patrons, especially when library staff is selecting materials on behalf of the patron. The [homebound participant application](#) is a good place to collect initial patron preferences regarding format, genres, favorite authors

or titles, and areas of interest. This information can be updated periodically based upon feedback about particular titles, [reader's profile](#), or included on [surveys](#) used to evaluate the homebound program.

While libraries generally do not retain circulation histories on patron account to protect the privacy of our users, a different approach may be warranted for homebound patrons. Since library staff may be selecting titles for patrons, it may be useful to keep a list of materials checked out to a patron--either through your ILS or in a separate spreadsheet or simple database--to avoid sending repeat titles and to aid in selection. It is recommended that the library ask permission to keep track of titles checked out to aid in selection on the [homebound participant application](#).

### **Planning your visits**

Although the basic delivery schedule has been established, it is good practice to call to confirm delivery a day or two before the scheduled visit. This practice helps prevent unnecessary trips if a patron has a scheduling conflict or has not finished using materials from the last visit. It is also a way to politely remind patrons of the upcoming visit and gives them a chance to collect materials to be returned, to dress appropriately, and not be startled by an unexpected visitor. Be sure to have a list of what they have checked out available when you call, as well as a list of what you plan on bringing for them. Be prepared to renew materials by phone, if necessary.

After confirming deliveries for the day, create a written [route schedule](#) and make this accessible to someone at the library. Include the patron's name, address, and phone number, estimated delivery time, and name of the delivery staff person or volunteer. In addition to its use in tracking statistics for measuring program outputs, keeping this information is an important practice to insure the safety of delivery staff and volunteers.

On the day of the visit, make sure all of your supplies, reader's advisory tools, laptop and other equipment are gathered and ready for the trip. Verify that the patron's materials have been pulled and checked out to them. Using outreach bags is a good way to organize materials for delivery. These can be lightweight reusable grocery-style bags or book bags. It is helpful to choose a bright color and to include the library's name and logo, with a simple tag labeled with the patron's name. Leave the bag along with the items delivered so that the patron has a convenient place to keep library material between visits. Providing a list of materials helps patrons keep track of items as they are returned to the bag.

### **Making the deliveries**

It is a good idea to call each patron on your route schedule to confirm delivery again and to give an estimated time of arrival. As health issues may arise quickly, this practice

helps insure that a trip is not wasted. Be sure to notate any changes on the route schedule.

The delivery process will vary from patron to patron. Some will be a quick exchange of materials; others will involve reader's advisory/material selection activities; and others will involve conversation. Keep in mind that many of your homebound patrons rarely receive visitors and will likely want to chat. This is part of the beauty of making in-person visits, as it affords a lonely individual a chance for social interaction and can be equally rewarding for the delivery person. To manage the process, decide beforehand how long you can chat and have an exit strategy in place. Remember to collect and verify the returned material in the presence of the patron.

### **Safety during deliveries**

In an ideal world, two library staff members or volunteers would make homebound deliveries to insure the safety of the delivery persons and to handle any unexpected situations that arise. However, for most libraries, this luxury is not possible, and one person ends up making the deliveries. The following is a list of tips and strategies to reduce risks and to prepare for emergencies:

- If at all possible, try to have more than one person make the initial visit. This allows you to scope out the situation and increase comfort level for future individual visits. Note the neighborhood and surroundings, any animals nearby, the condition of the home, etc.
- When you call to confirm the visit, ask the patron if anyone else will be at their home.
- Carry a cell phone with you at all times. Call someone from your library before entering a patron's home and again after the visit. Have the library's phone number (an extension that will be answered by a live person) programmed in and ready to dial with one push.
- Set the cell phone alarm to ring after a certain length of time. When it rings, treat it as if it were an incoming call. This is also a good exit strategy to disengage from lengthy conversations with chatty patrons.
- Note the surroundings each time you enter a house. Is anyone lurking around? Make eye contact and greet people you encounter, and make sure your cell phone is visible to them. Pretend to be on a call or make an actual call to your library as you walk from your car to the house.
- Use your intuition. If you feel unsafe for any reason, do not exit the vehicle or enter the residence. Instead, call the patron to reschedule the visit, and come back later with another person.
- Remember that people who do not leave their homes often surround themselves with an abundance of possessions and pets. Be respectful of their homes but aware that conditions may not be completely sanitary.
- Have a clear procedure in place for handling an emergency. When delivering to a person in poor health or who has a disability, you may walk into a situation in

which the patron has fallen, is injured, or is experiencing pain, shortness of breath, etc. It may be necessary to call 911, even if the patron downplays the extent of their situation.

- Have an emergency contact person on file for each person you visit. Update this information regularly.

## By-mail delivery

Many libraries choose to deliver materials to homebound individuals by mail. Dubbed the Netflix-style delivery model, materials are sent out to a patron by mail, along with return postage. When the patron is finished using the materials, he/she returns them by mail and requests more items. Delivery by mail programs have the following benefits and challenges:

Benefits	Challenges
<ul style="list-style-type: none"> <li>• Requires less staff time per registered user than in-person delivery model</li> </ul>	<ul style="list-style-type: none"> <li>• Makes it more difficult to locate and register new homebound patrons</li> </ul>
<ul style="list-style-type: none"> <li>• Allows delivery to larger geographic areas</li> </ul>	<ul style="list-style-type: none"> <li>• Does not meet the social needs of homebound patrons in the same way the in-person delivery model does</li> </ul>
<ul style="list-style-type: none"> <li>• Can involve multiple staff people in the library, including volunteers, so that gaps in service do not occur when an outreach person is on vacation or leave</li> </ul>	<ul style="list-style-type: none"> <li>• Number of items sent with each shipment is limited. Oversized books, library equipment, and more fragile formats such as magazines may not hold up well during shipment</li> </ul>
<ul style="list-style-type: none"> <li>• Deliveries can better match the patron's reading speed and are not tied to a set delivery schedule</li> </ul>	<ul style="list-style-type: none"> <li>• Reader's advisory and materials selection is more challenging</li> </ul>
<ul style="list-style-type: none"> <li>• Can yield rewarding community partnerships with organizations willing to promote the service</li> </ul>	<ul style="list-style-type: none"> <li>• Some patrons might not be physically or intellectually able to package material for mailing and may require additional help</li> </ul>
<ul style="list-style-type: none"> <li>• May be more appealing to younger, more autonomous patrons and those who do not want someone visiting their home</li> </ul>	<ul style="list-style-type: none"> <li>• The library has less control over and ability to recover lost or unreturned material</li> </ul>
<ul style="list-style-type: none"> <li>• A higher number of patrons can be reached and more materials delivered than by in-person delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Additional certification of homebound status may be necessary, as library staff may never meet homebound patrons.</li> </ul>
<ul style="list-style-type: none"> <li>• Little or no expense for mileage, fuel, or transportation</li> </ul>	<ul style="list-style-type: none"> <li>• The outreach program is not as visible in the community as in-person visits</li> </ul>
<ul style="list-style-type: none"> <li>• Less vulnerable to budget cuts affecting staffing levels and transportation costs</li> </ul>	<ul style="list-style-type: none"> <li>• Postage, packaging, and marketing costs are higher than those of in-person deliveries</li> </ul>
<ul style="list-style-type: none"> <li>• Little or no safety risk to library staff or volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Outreach to group facilities, nursing homes, and senior centers is not as seamless as with in-person deliveries</li> </ul>

By-mail delivery models are most appropriate for libraries wishing to serve a wide geographical area. This area might be defined by the city limits but also may include a broader area, such as an entire county or metro-area. While in-person deliveries are most likely based out of a central location and have designated staff and volunteers involved, by-mail programs can include a wider array of staff and volunteers.

Many libraries are attracted to a by-mail delivery program because on the surface it seems to be less labor-intensive for staff. It is possible to launch a delivery-by-mail program without hiring or designating an outreach staff person; however, it is important to realize that connecting with people who do not leave their homes is incredibly challenging. Locating and registering new homebound patrons and insuring that they are comfortable with the process often requires human intervention and assistance. Library staff, volunteers, partner organizations, and caregivers of homebound recipients play a pivotal role in this process.

It is strongly recommended that the library designate a homebound program coordinator to oversee the program, guide marketing efforts, network with community groups and service organizations, train volunteers and staff, and evaluate and report the success of the program. Whether creating a new position or adding the responsibility to an existing position, a delivery-by-mail program will grow more rapidly and be more sustainable if someone is accountable for its success. The ideal program coordinator has a passion for outreach services, is comfortable interacting with elderly and disabled people, is very detail-oriented, has good written and verbal communication skills, is comfortable networking with and presenting to community groups and partner organizations, and works well with minimal supervision. A sample [job description](#) for a program coordinator is included in [Appendix A](#).

A by-mail delivery model requires as much planning and commitment as an in-person delivery model. The following questions are useful for libraries considering this type of delivery model:

- Does the library have sufficient staffing levels to implement a homebound delivery-by-mail program?
- Is there someone on staff who could act as program coordinator? How will this impact his/her other duties and tasks?
- Does the library have sufficient budget to cover postage, packaging materials, and marketing materials?
- Will multiple staff members and volunteers be involved in reader's advisory, materials selection, and shipment activities? How will the process be managed?
- Does the library have the necessary equipment to ship and receive packages, purchase and print postage, etc.?
- Does the library staff, board, or support group have ties to community organizations which may help promote the program?
- How will homebound patrons communicate with the library to register for the program, order material, and handle account issues?
- How will eligibility be established and/or verified for homebound services?



## **Tips, best practices, and expectations for by-mail delivery programs**

Delivering materials by mail to homebound patrons can be a rewarding experience and greatly extend the reach of library services to those who need it the most. Although library staff may never meet a homebound participant in person, a relationship is established, nonetheless. Staff members processing homebound orders may get to know patrons during the course of reader's advisory and selection activities and may spend a lot of time communicating by phone, email, or in writing with the person. This relationship can be rewarding for staff and for the homebound individual, although they may never meet face to face. It can be disconcerting and heartbreaking to suddenly lose contact with a homebound patron, who may have fallen ill, moved, or even passed away. Having an emergency contact person is just as important for by-mail delivery programs as it is for in person programs.

Starting a new homebound delivery-by-mail program is a challenging endeavor for libraries. It may seem like the program is less targeted and unfocused, compared to in-person delivery models. The following section provides tips, insights, pitfalls, challenges, and best practices for libraries developing a by-mail delivery program.

### **Reaching homebound individuals**

It seems obvious, but reaching people who cannot easily leave their homes is difficult. Passive marketing techniques such as posters, fliers, and bookmarks work well for traditional library programs, but may not be as successful for homebound programs. While some homebound individuals will hear about the program and initiate contact with the library, NTLP and the pilot libraries found that it almost always takes personal contact of some sort to reach your target market. This contact can be library staff, volunteers, partner organizations, or caregivers who help guide the homebound person to the program. Additional marketing techniques are included in the [Marketing, Promotion and Community Partnerships section](#) of this ToolKit.

Libraries which deliver materials by mail will need to develop methods for determining eligibility and registering new users. This process should minimize risk of loss and fraud for the library but also be welcoming and provide easy enrollment for homebound patrons. Library staff may never meet a homebound participant and frequently, this person does not already have a library card. The usual library card application process of visually verifying identification and proof of residency may need to be altered to accommodate homebound individuals. The following is a list of suggested practices for accomplishing this task:

- Develop a variety of ways for homebound individuals or their representatives to communicate with the library to register for homebound services. These may include creating an online registration form through your website, distributing written applications with return-mail envelopes throughout the community, and engaging volunteers to act as liaisons between the library and homebound individuals.

- Partner with senior centers and residential facilities to coordinate group registration events.
- Set up an outreach email account for incoming homebound inquiries, accessible to multiple library staff and checked at least daily.
- Have procedures in place to set up library cards by phone or email and mail [homebound participant applications](#) and [reader profile forms](#) to patrons for their signature. Be sure to include return-mail envelopes so that the forms can be returned without cost to the patron. The successful delivery of documents back and forth can serve as proof of residency.
- Rather than mailing an actual library card or even just a library card number, keep the card on file at the library. This will protect the patron and the library from suffering unauthorized use.

### **Determining eligibility**

Homebound programs are created for people who cannot easily come into the library, but by-mail programs can service a large geographic area almost as easily as a small area. On the surface, it is as easy to mail a package 15 miles as 2000 miles. Unless the program costs are completely underwritten by grants or broad funding sources, local tax dollars are most likely involved. It is necessary for the library administration and stakeholders to decide how expansive or restrictive the service will be and to set very clear eligibility requirements based on the mission and goals of the homebound program.

As with any library service or program, libraries may be concerned that people will take advantage of the program in some way, taking staff time and resources away from people who truly cannot come into the library. Unlike an in-person delivery program, library staff often never meets a homebound patron and thus does not have the benefit of “seeing” that the need is real. If the library is limiting the program to residents only and is surrounded on all sides by other cities or rural areas, additional steps may be required by governing bodies before enrolling new homebound patrons.

Some by-mail delivery programs require certification of homebound status, to discourage abuse of the program. The certification is normally provided by a neutral third party such as a social worker, doctor or other health-care provider, a member of the clergy, or a representative from a partner organization. Many other homebound services require this sort of verification, so most homebound patrons will be accustomed to providing it. The certification can be integrated into the [homebound program application](#) and should include space for the certifier to sign and provide contact information. .

Some by-mail delivery programs allow applicants to self-report or self-certify their eligibility for homebound services. This should be integrated into the homebound program application. Provide a list of various qualifying conditions with check boxes, and include a place for the patron to sign. While not as official as requiring a third-party

certification, this does at least establish a good faith relationship between the library and the patron.

Keep in mind that requiring a third party certification can act as a barrier to individuals who may already feel intimidated by the registration process. Homebound delivery programs tend to be self-limiting by nature, as only a few materials can be shipped at a time and delivery takes days. Library staff should consider whether or not local residents might abuse the service rather than checking out materials for themselves. Each library should carefully evaluate how to best meet the goals of the homebound program while still taking steps to minimize its exposure to risk.

### **Materials selection**

While some of your patrons will search the catalog online and place holds on materials themselves, many homebound patrons will not feel comfortable with this process or may not have access to a computer. Reader's advisory services and materials selection will often depend on input from library staff or volunteers, with online, written, and telephone selection and reader's advisory tools aiding the process. As with in-person programs, ask permission to collect and store reading preferences and circulation data to aid in selection.

While many libraries have become "green" and discontinued the practice of printing reader's guides, book lists, and read-alikes, remember that many of your homebound patrons will not use the computer to select material. Publishing and distributing a booklet or catalog of representative titles may be justified for homebound program. This printed list is the equivalent of browsing the stacks. Remember to use a large (at least 16 point), san serif font.

Library staff may spend a good bit of time on the phone with a patron to facilitate materials selection and should schedule calls during off-desk times whenever possible. These conversations are also a way to meet the social needs of your homebound patrons. With patrons who tend to be chatty, decide beforehand how long you can spend on the phone and use a polite exit strategy. When placing or returning phone calls, ask the patron if it is a convenient time to talk. Conversely, if you are on a service desk or likely to be interrupted, ask the patron if you can call them back and agree upon a time.

### **Shipping materials**

Libraries just starting out with by-mail delivery programs may assume that mailing the packages will be the most labor-intensive aspect of homebound delivery. Ironically, once the procedure is set in place, this process is actually the least time-consuming component.

Materials may be shipped in either padded mailing envelopes or in reusable mailing bags. While the cost of the former is lower initially, sturdy vinyl shipping bags with sewn-in pockets for address cards and postage cards will last longer and also provide visual branding for your program. Additionally, patrons can keep library materials inside the bag when not in use, reducing the chances of loss or damage to the items. In addition to the packaging materials, the library will want to invest in a postage scale, printers for address and postage labels, and software which integrates the process. A list of vendors with various shipping supplies is found at the end of this [Appendix B – Additional Resources](#).

Whatever process for shipping and receiving materials you develop, the return-mail process should be easy enough for your patrons to perform independently. Keep in mind that your target market may have physical and intellectual disabilities which may impede the process. Written instructions should as simple as possible and be provided in a large, sans serif font. If you are sure you have patrons who read Braille, consider having the instructions printed in Braille (most printing shops offer this service) and providing audio and/or video instructions through a web link or an emailed file. A notch along the edge of an address card or postage label will help patrons with visual impairments orient the return-mail card or label properly. Finally, be sure to include a blank order form with the shipment so that patrons may request the next batch of materials.

Whenever possible, the library should communicate directly with the homebound individual. However, it may be beneficial for a caregiver or family member to also be involved with the shipping and receiving process. Often, this person will also be listed as the emergency contact for your patron. Be sure you have written permission from the homebound patron and make a note of this person's name and phone number in the patron record as being authorized to access information about the patron's account.

You may also find yourself communicating with the postal carriers who deliver to your homebound patrons, especially if you are shipping packages which are larger than what fits inside a mailbox. When delivering to individuals living in a group facility, nursing home, or retirement village, find out how packages are handled and distributed. Limiting the size of outgoing packages is also recommended, as your patron may not be able to lift and maneuver heavy packages of books to and from the mailbox or front porch.

### **Materials for the blind**

The United States Postal Service (USPS) does allow material for the blind or visually impaired individuals to be sent free of charge. There are strict eligibility requirements for this program and it is likely that your homebound program also serves individuals who do not qualify for postage-free deliveries. Managing the process to insure compliance with postal guidelines might outweigh the benefits of saving the cost of postage for qualifying packages. For more information, please see the USPS Domestic Mail

Standards, [Section 703](#) (Non-Profit Standard Mail and Other Unique Eligibility) or contact your local post office.

## **IV. Planning your homebound program**

Now that you have learned how to assess the needs of your community and are familiar with different delivery models, it is time to design your library's homebound program.

### **Building support**

A successful homebound program will have broad support from various stakeholders in the library, the city or county, and the community. Information gathered during the community needs assessment will assist you with the task of communicating the need and vision for your homebound library program. The first step is to obtain buy-in from library and city or county administration, your library board and Friends groups, library staff which will be involved with implementing the program, and other community stakeholders. Exploratory committees and/or focus groups are a good way to gather input and support for your program. Including stakeholders in the planning phase—from within as well as outside the library organization—increases the chance of success by creating a sense of shared ownership and pride in the program. This also creates a marketing force ready to engage in word-of-mouth promotion once the program launches.

### **Selecting a delivery method**

Choosing a delivery method is an important part of the homebound program design. There are benefits and costs associated with both delivery models, as outlined in the [Delivery Models](#) section. Some libraries may even decide to create a hybrid program, making in-person deliveries to nearby participants and mailing materials to people who live outside the feasible delivery area. Other libraries may deliver to individuals by mail but take carts of books to group facilities such as long-term care facilities, correctional facilities, homeless shelters, or battered women shelters. Your homebound program should reflect the needs of the unique community your library serves.

### **Deciding what to lend**

Most libraries engaging in homebound delivery provide materials from their regular circulating collection. In general, it is beneficial to offer access to the same materials as would be available in the library; however, there are some special considerations when deciding what to lend:

- Some formats (such as magazines, CDs in regular jewel cases, etc.) may not hold up as well during delivery.
- Oversized books may be too heavy for your patrons to maneuver or too expensive to mail.

- Popular materials such as bestsellers, DVDs, etc., may be out of circulation for a longer period of time than for regular checkouts. Some libraries choose not to lend these items or purchase additional copies only for homebound circulation and “shadow” the titles in the ILS.
- Materials from other libraries such as InterLibrary Loans or consortium materials pose a unique challenge. The checkout periods for homebound patrons may exceed the lending policies of other libraries; furthermore, if materials are lost or damaged, the flexibility to waive or reduce fees may not be possible.
- Homebound patrons may not possess the latest technology devices and so might enjoy formats that other patrons no longer value, such as cassette tapes and videocassettes. They may also appreciate the flexibility of audio/video media, such as [Playaways](#), which do not require a device to use.
- Portable CD and DVD players are relatively inexpensive and may allow patrons the ability to use additional media formats. Consider purchasing and lending these devices along with the materials.
- Purchase special collections carefully, and take steps to verify that the format is desired by your patrons. For example, while many homebound patrons prefer Large Print books for ease of visual access, they may not be able to hold or lift heavy hardbound books. Patrons with mobility or strength issues may prefer small trade paperbacks coupled with a page-sized magnifier.
- For deliveries to groups such as senior centers, retirement villages, long-term care facilities, and correctional facilities, consider taking donated or withdrawn material to minimize the loss of circulating items. Many people come and go from these facilities, including homebound people and their families, medical professionals, facility staff, etc. Trying to keep up with individual items delivered to group facilities may be impractical and cause stress among outreach staff and staff at the facilities you visit.

## Policy development

A written [policy](#) should be developed and approved to govern your homebound program. This policy should be broad enough to allow for future fine-tuning of procedures and processes while still providing a good foundation upon which to build your program. Things to include in your policy are:

- Goals of the program
- Date of approval and inception
- Who is eligible for the service?
- How will a person establish eligibility?
- How will materials be delivered?
- How will materials be returned?
- How many items will be sent at a time?
- Are there costs to the patron involved? (Overdue/extended use fees, lost or damaged materials charges, postage costs, etc.)
- Plans for evaluating and reporting the success of the program

(For [sample policies](#), see [Appendix B – Additional Resources](#).)

## **Budgeting**

How much to budget for your program will depend on many variables, such as method of delivery, postage rates, size of your packages, whether staff or volunteers will implement the program, etc. Donated hours and materials should be shown as in-kind contributions. Below is a list of categories to include in your budget and some benchmark costs.

### **Personnel expenses**

Regardless of the method of delivery, it will take a significant amount of staff and/or volunteer time to develop, oversee, and implement the homebound service. Assuming that a by-mail delivery program will be easy to implement with minimum staff time is a mistake that libraries often make. Time saved on making in-person deliveries will probably be offset by time spent on developing community partnerships, locating and registering new homebound patrons, and selecting materials for homebound participants. Planning and implementing a successful homebound program will take at least 10-20 hours per week, regardless of the delivery method.

Having an MLS-degreed librarian oversee the program may be preferred but not always possible. An experienced paraprofessional with a passion for outreach can be just as effective as an MLS librarian. Keep in mind that reader's advisory tasks may be allocated to librarians who are not the main outreach person. The knowledge and expertise of your staff, the availability of volunteers, and current job market may affect the final personnel budget as well.

Volunteers may play a large role in your program, and in some libraries, a volunteer might be the person acting as homebound coordinator. Volunteer hours should be included as in-kind contributions in your homebound budget. Be sure to include staff time for interviewing, training, and managing volunteers.

### **Delivery expenses**

For in-person deliveries, transportation costs should be included in your budget. These costs may include the cost of an outreach vehicle, fuel costs, insurance costs and vehicle maintenance. Deliveries made in private vehicles may involve reimbursement for mileage. The library may have increased liability for the use of a privately owned vehicle in work-related duties. Supplies such as delivery bags, book trucks, ramps or dollies may be included. Limiting the area and frequency of deliveries may help manage this part of the budget.



By-mail deliveries will include expenses such as postage, mailing supplies, packing materials, labels, zip ties, and address cards. While how many items are shipped, frequency of deliveries, and the cost of postage may fluctuate, it probably will cost between \$2 and \$4 to ship a package of materials one way. Be sure to include return mail postage in your calculations. To manage costs, it might be necessary to limit the number of items shipped and/or the frequency of shipments.

### **Equipment expenses**

Besides the cost of postage scales, other types of equipment may be helpful to include as you plan the budget, although basic homebound service can be accomplished without additional equipment purchases. However, you may consider including the following items:

- A sturdy outreach laptop, tablet, or netbook is useful when making visits to homebound individuals or groups.
- A wireless card for Internet access—normally sold as a monthly subscription by mobile phone providers—is almost a necessity if you want to use an outreach laptop, as many homebound individuals will not have Internet access.
- A license for your Integrated Library System (ILS) for the outreach laptop, if you want to create library cards during outreach visits or need access to a staff view of the ILS.
- Peripherals for the laptop such as barcode scanners are useful if you plan on checking out material outside the library.
- Assistive technology devices designed for whatever disabilities individuals in your program may have.
- Equipment such as portable CD players, cassette players, and DVD players, or E-book readers for circulation to homebound residents.

### **Collection expenses**

Include any special collections you intend to purchase for circulation to homebound patrons, such as [Bi-Folkal](#) Kits, [Playaways](#), duplicate copies of bestsellers, trade paperbacks, etc. See [Deciding What to Lend](#) for more information

### **Marketing and promotion**

Include printing costs for fliers, bookmarks, brochures, and postcards; video production for online and cable access distribution; press releases and articles in local newspapers; and other promotional items such as magnifiers, bookbags, ID tags for delivery bags, etc. Keep in mind that you will be marketing to homebound individuals as well as friends, family, and caretakers, both inside and outside your facility. Variety in your marketing formats will increase the likelihood of connecting with your target market; and this category will most likely need more funding than assumed. See [Marketing, Promotion and Community Partnerships](#) for additional ideas.



## Goal setting and measuring success

It is important to develop measurable goals for your homebound program and to take steps to evaluate the program at regular intervals. The goals of the program should reflect the community needs as determined during your assessment and should also be in line with the mission and vision of the library and larger municipal entity. Your project will involve measuring and reporting outputs and outcomes, but you will also want to capture anecdotal information.

### Outputs

Output numbers are tangible statistics which illustrate program use and are useful for mapping patterns and tracing growth of your program. These statistics are both tracked manually by outreach staff and volunteers and generated from ILS reports. It is recommended that these numbers be collected and reported on a monthly basis. Output measures you may wish to track include:

- Number of registered homebound participants
- Number people served by the program (include outreach to groups)
- Number of items circulated
- Number of deliveries or shipments
- Number of items purchased for circulation to homebound patrons
- Number of programs presented at group facilities

### Outcomes

Outcomes are closely tied to the goals which are set for the program. The data is collected directly from homebound participants in the form of periodic [surveys](#). The surveys may be conducted in writing, by phone, or in person. It is helpful to use a Lickert scale to determine a baseline answer and to compare answers before and after participation in the homebound program. Possible outcomes to measure include:

- Participants will report an increased knowledge level because of the homebound program.
- Participants will read/listen to more books and view more videos because of the homebound program.
- Participants will increase their use of related library services such as reader's advisory, reference services, or other programs because of the homebound program.
- Participants will report an increase in knowledge about community news and events because of the homebound program.
- Participants will report an increased value placed on lifelong learning because of the homebound program.

## **Anecdotal evidence**

Homebound programs do not generally produce high output numbers. It is an uphill struggle to find and enroll new participants, and many drop from enrollment due to health issues, residential changes, or even death. Outcomes are usually positively reported, but data is sometimes hard to gather. It is tempting to become discouraged by slow growth and low participation numbers as compared to other library programs. To truly measure success of a homebound program, it is important to realize that while the output numbers may not rival summer reading club or children's programming, the impact on the lives of the participants is uniquely deep and meaningful. Anecdotal evidence reported by homebound patrons, their caregivers, and outreach staff and volunteers are often the best way to illustrate the benefits of your program. Collecting and reporting these stories is strongly recommended.

## **Conducting surveys**

While some of your participants may complete and send in written surveys, it is likely that data will need to be collected verbally. Document the answers on the survey instrument. In addition to asking questions to measure specific outcomes, take this opportunity to ask questions which will help you fine-tune marketing efforts, tweak reader's profiles, update emergency contact information, etc. Be sure to give patrons the opportunity to provide comments, questions, and anecdotes.

## **Procedures**

Having written procedures facilitates training of staff and volunteers, protects the library and homebound participants, and ensures equitable access for everyone. While policies are broad-based and general, procedures are more specific and will need updating and revising more frequently. Procedures should be written for the following homebound tasks and processes:

**Registering new homebound participants**

**Creating library cards, handling circulation, and adapting ILS procedures**

**Making deliveries**

**Providing outreach to group facilities**

**Collecting and reporting statistics**

**Handling lost and damaged materials**

**Ensuring safety and handling emergencies**

## **Circulation rules for homebound patrons**

It is likely rules associated with homebound patron library accounts will differ from those for other patrons. Since outreach staff and volunteers manage much of the circulation activities for the patron, decisions will need to be made regarding overdue fees, checkout periods, placing holds, and other circulation-related issues.

It is helpful to know what settings can be managed by your ILS and to automate these changes whenever possible. Depending on the capabilities of your ILS and the ability of library staff to change ILS settings, consider implementing the following ILS features:

- Create a unique account profile type for homebound patrons and customize the circulation rules associated with this profile type. This enables your ILS to automate much of the account management for homebound cardholders and will facilitate easy statistical reporting. Customizations for homebound profile types include:
  - Longer check-out periods
  - No overdue fines assessed
  - No automated hold and/or overdue notices sent
  - Check-out histories retained
  - Specialized statistical reports
- Use fine-free or exempt check-in if this cannot be automated by account profile type.
- Add notes to the patron record with emergency contact information, format preferences, special delivery notes, etc. This is especially helpful if more than one person is involved with homebound deliveries and/or shipments.
- To bypass system-generated calls and emails, move phone numbers and email addresses from the normal fields to a note field so that it is on file with the patrons record.
- Create a special homebound account number to place holds on behalf of patrons to ensure that available holds are routed to outreach staff rather than placed on the regular holds pickup shelf.
- If you allow homebound patrons to place their own holds online, take steps to make sure notifications go to homebound staff instead of those patrons. This will help staff manage the process, and the patron will not send in a family member to pick up an item that has been mailed out nor wonder why it is taking a week to receive their hold. You may need to “trick” your ILS to keep these automated notices from going out to patrons. Create a special staff email account for homebound communications and enter this into the email field in the patron’s record. Instead of the patron’s phone number, enter a staff member’s work phone number into the phone field. In this way, automated email and telephone hold notices will go to the outreach staff instead of directly to the patron, so outreach staff will know to look for a hold.
- Test these ILS changes by setting up a “dummy” account or modifying a staff account to make sure everything works as intended *before* going live with patron accounts.
- Create a homebound workspace in the library to house supplies, gather incoming and outgoing deliveries, check-in and check-out materials, collect available holds, etc. If more than one person is involved with homebound deliveries or shipments, consider keeping a shared notebook, journal, spreadsheet or word document to record communications with patrons, tasks completed, pending issues, and other relevant information.

## V. Marketing, promotion, and community partnerships

Most libraries which offer programming for adults understand that building any successful adult program takes a lot of time and effort. It may take several failed attempts and years of repeating a program to see output numbers which come close to the numbers which youth programs seem to gain quickly. Adults are autonomous individuals with a wide variety of interests, while children are often captive audiences spurred on by schools and parental guidance. Homebound programs are even more difficult to grow; as mentioned previously, reaching people who cannot easily leave their homes poses a unique marketing challenge for outreach staff.

As you develop marketing strategies, consider the unique characteristics of your target market. Age, diversity, background, disabilities, access to and comfort with technology, and communication preferences all affect the success of your promotional efforts. The most effective strategy is to develop a clear message and broadcast it in as many different ways as possible. Consider reworking the message several ways in order to reach different target audiences. Marketing efforts may reach homebound individuals as well as friends, family members, and caregivers. Promote your program in these ways:

- Create posters, fliers, and bookmarks to distribute inside the library.
- Ask permission to distribute fliers to places where homebound individuals may go occasionally, such as doctors' offices and hospitals, dialysis centers, treatment and rehabilitation facilities, recreation and senior centers, banks, insurance agencies, churches, hair salons and beauty schools.
- Ask businesses and organizations which deliver goods and services to homebound individuals to include fliers with the deliveries.
- Use marketing pieces such as magnets, magnifiers, key rings, and booklets which are less likely to be glanced at and discarded.
- Make sure all library staff are aware of the program, and encourage them to talk up the program to patrons. Circulation staff members are a great resource, as they interact with most patrons who use the library regularly, know many patrons by name, and are aware of patrons who are in declining health or who send family members in to pick up and return material. A quick description of the new homebound program from a caring circulation staff person, accompanied by a bookmark or brochure with additional information, has a greater chance of resulting in a new homebound registration than hundreds of fliers left around the community.
- Promote your program to other city departments.
- Include homebound information on water bills.
- Include homebound program information on electronic signs at the library and other city departments. Ask churches, schools, and businesses if they will include it on their electronic signs.
- Saturate electronic avenues with your message, including e-newsletters, blogs, and social networking sites such as Facebook and Twitter.

- Have a presence at all community and civic events and actively promote the homebound program.
- Offer to speak to civic groups, social clubs, churches, charities, and the Friends of the library.
- Ask your current homebound participants for referrals.

### **Developing effective community partnerships**

NTP and the homebound pilot libraries discovered that the most successful way to spread the word about homebound services is through word-of-mouth promotion. While some homebound individuals might see a flier, hear a podcast, or see something online and contact the library to enroll, this is the exception rather than the rule. Survey responses provided by homebound participants to NTP indicate that most heard about the program through a friend, relative, clergy member, home health care provider, or other word-of-mouth avenues.

How can a library enlist a loyal band of homebound program “ambassadors” to promote the program? Developing community partnerships with organizations and businesses which serve homebound people—the same organizations you identified during the community needs assessment—are the best places to start. Community partnerships are the most effective way to promote your service, increase the visibility of the library, generate goodwill between organizations, and potentially increase the reach of both the library and the partner organization.

Developing effective community partnerships is like any relationship—it takes time and effort to create and nurture the bond. Be prepared to invest a significant amount of time in the process, as carefully chosen partners who will talk up your program are pivotal to the success of your homebound program. The ideal community partner:

- Has similar mission, goals, and services,
- Serves the demographic you are trying to reach,
- Has a history of working with other organizations, and
- May be a non-profit or a for-profit organization

Once you have identified potential partners, decide how you will make initial contact. Consider sending out [letters](#) or emails to introduce the library and the homebound program, and follow up with a phone call. Enter the contact information into a log, spreadsheet, or word-processing document to keep track of your efforts and to avoid re-contacting an organization which is not interested in participating. Having a log is especially useful when more than one person is making the calls. If possible, include the name of the decision maker or marketing person in the spreadsheet, even if it means calling ahead to ask to whom to address the letter. Document all contact efforts under “notes” in your log, and, if more than one person participates, be sure that each initials his/her notes in case anyone has questions later.

When you have reached organizations which are interested in partnering with the library, it is helpful to meet with them individually or as a group. Consider hosting a luncheon or tea, especially if the organizations are similar to each other. During these meetings and throughout the process:

- Make sure you are speaking to the correct person.
- Take time to understand the goals of the organization. Ask lots of questions.
- State your goals, share your literature, and explain clearly what you envision for the partnership.
- Do not get discouraged if your initial vision cannot be implemented.
- Be willing to negotiate and develop solutions that will work for both sides
- Thank the person/organization for their time.
- Ask for referrals, suggestions, and input.
- For complex partnerships, develop a Memorandum of Understanding (MOU).
- Communicate positively and frequently. Let them know their efforts were fruitful. Keep them apprised of the growth of your program.

It is also important to remember that what works well in one community might not translate into yours. This includes program design elements, marketing efforts, and partnerships with similar organizations. Be patient and diligent, and success will follow.

## **VI. Other ways to serve**

Perhaps your library is not quite ready to implement a full-blown homebound delivery program, but you would like to begin reaching out in small but meaningful ways to homebound people. Below are some suggestions that can be implemented without a large outlay of expense or staff time:

- Start doing outreach to group homes, residential facilities, etc. You can do programs for groups of people (Bi-Folkal kits are programs in a box) and/or leave carts of donated or discarded materials at targeted places.
- Invite groups from these same places into the library for programs or library visits.
- Explore options for transporting homebound individuals into the library.
- Develop and host programs for seniors such as adult reading clubs, gaming days, etc.
- Host a telephone or virtual chat book discussion.
- Consider doing homebound delivery on a trial basis.

Another way to reach underserved people in your community is by promoting your state's chapter of the National Library Service (NLS) for the Blind and Physically Handicapped, a [program](#) which provides free braille and audio materials to eligible borrowers in the United States by postage-free mail. Texas residents are served by the [Texas Talking Book](#) program, administered by the Texas State Library and Archives Commission. While not everyone who is homebound qualifies, this invaluable and free service can extend the reach to underserved segments of your population.

## VII. Conclusion

NTPP hopes that this ToolKit is useful to libraries wishing to develop or expand homebound programs. Comments, questions, feedback, and success stories are welcome. Please contact Marci Chen at [mchen@ntrls.org](mailto:mchen@ntrls.org) for more information or to share your insights regarding library services to homebound individuals.

## **Appendix A - Sample Forms**

### **Forms:**

- Sample 1 - Outreach Librarian Job Description**
- Sample 2 - Homebound Program Coordinator Job Description**
- Sample 3 - Participant Application (In-Person Delivery)**
- Sample 4 - Participant Application (By-mail Delivery)**
- Sample 5 - Homebound Reader's Profile**
- Sample 6 - Homebound Service Policy**
- Sample 7 - Route schedule log**
- Sample 8 – Survey**
- Sample 9 – Letter to churches**



## Sample 1 - Outreach Librarian Job Description

**Definition:** Coordinates and performs professional library functions relative to area of assignment; provides reference services and technical assistance to library patrons; participates in collection development and/or maintenance activities; and performs other related duties as assigned.

### **Essential Job Functions:**

- Assists homebound customers in locating materials and information
- Formulates goals, plans, and procedures for promoting homebound library services
- Selects books and materials for homebound customers
- Delivers community outreach services at local schools, senior citizen facilities, and businesses; conducts off-site library card registration; provides library materials to homebound patrons.
- Assists in maintaining the library's facilities, equipment, and vehicles; performs minor maintenance as required.
- Monitors the project budget and/or materials budget
- Makes presentations or speaks to community groups
- Provides instructions on the use of library resources including electronic sources
- Maintains records/statistics and prepares reports as directed
- Publicizes homebound services through programs and literature
- Oversees and coordinates volunteers who help with homebound delivery
- Ability to get along with customers and co-workers
- Regular and punctual attendance
- Performs other duties as assigned

### **Physical Requirements:**

- Must be able to lift 25 pounds to deliver library materials to homebound patrons

### **Minimum Qualifications:**

- Master of Library Science or equivalent from an ALA accredited school
- One year of progressively responsible experience in a public library

### **Required Knowledge of:**

- Principles and practices of library science
- Library operations, services, policies, and procedures
- Circulation, reference, and readers' advisory principles and practices
- Library equipment, materials, and technology
- Customer service standards and protocol

### **Conditions of Employment:**

- Must have a valid Class "C" Driver's License prior to employment
- Must pass a drug test
- Must be able to reach above shoulder height and stoop below knee level

## Sample 2 - Homebound Program Coordinator Job Description

**Definition:** Responsible for day-to-day operation of special projects and services to assist homebound library customers in locating needed information and materials and to promote library services to the homebound population.

### **Essential Job Functions:**

- Assists homebound customers in locating materials and information
- Formulates goals, plans, and procedures for promoting homebound library services
- Selects books and materials for homebound customers
- Pulls holds and mails materials to homebound customers
- Monitors the project budget and/or materials budget
- Makes presentations or speaks to community groups
- Provides instructions on the use of library resources including electronic sources
- Maintains records/statistics and prepares reports as directed
- Publicizes homebound services through programs and literature
- Oversees and coordinates homebound program volunteers
- Ability to get along with customers and co-workers
- Regular and punctual attendance
- Performs other duties as assigned

### **Physical Requirements:**

- Must be able to lift 25 pounds to deliver library materials to homebound patrons

### **Minimum Qualifications:**

- Master of Library Science or equivalent from an ALA accredited school
- One year of progressively responsible experience in a public library

### **Required Knowledge of:**

- Principles and practices of library science
- Library operations, services, policies, and procedures
- Circulation, reference, and readers' advisory principles and practices
- Library equipment, materials, and technology
- Customer service standards and protocol

### **Conditions of Employment:**

- Must have a valid Class "C" Driver's License prior to employment
- Must pass a drug test
- Must be able to reach above shoulder height and stoop below knee level

## Sample 3 - Homebound Application (In Person Delivery)

### Anytown Public Library Homebound Application

**Participant:**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

**Emergency Contact Person:**

Name: \_\_\_\_\_  
Phone/Email: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Authorized to get information about account? (Initial)  Yes  No

**Library Card Information:**

I have a library card. My number is: \_\_\_\_\_  
 I don't have a library card yet. Please contact me about setting up a card.

I am unable to easily come to the library because of (check one):

Age-related issues  Illness or disability  Other: \_\_\_\_\_

I understand that I am responsible for materials delivered to me through the homebound program.

---

Signature of participant

Date

**Frequency of Deliveries:**

Weekly  Every two weeks  Every three weeks

**Reading Interests(circle all that apply):**

<b><u>Fiction</u></b>			<b><u>Non-Fiction</u></b>
Romance	Classic Literature	Biographies	History
Mystery	Christian	Philosophy	Fine Arts
Science Fiction	Poetry	Religion	Travel
Westerns	Other: _____	Self Help	Other: _____

My favorite authors are: \_\_\_\_\_

**Formats/Types of Materials (check all that apply):**

Books:  Large Print  Regular Print  Paperback  
Movies:  Videocassettes  DVDs  BlueRay  
Music:  Audiocassettes  Compact Discs  
Audiobooks:  Audiocassettes  Compact Discs  Playaways

**Sample 4 - Homebound Participant Application (By-Mail Delivery)**

Anytown Public Library – Application for Homebound Services

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Emergency contact:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Relationship to homebound applicant: \_\_\_\_\_

I understand that I assume responsibility for the materials I receive. I will make sure the materials are returned by placing the items in the labeled envelope supplied by the Anytown Public Library and mailing it back at no charge if the envelope supplied is used. I understand that I will become ineligible for this service if I do not return library materials.

\_\_\_\_\_  
Applicant's Signature

**CERTIFICATION:**

To be filled out by physician, nurse, clergy, or social worker

I consider \_\_\_\_\_

physically unable to travel to the library.

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ Phone \_\_\_\_\_

## Sample 5 - Homebound Reader's Profile

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### GENRES (1=low interest 3 = high interest)

Literary Fiction \_\_\_\_\_ Mysteries \_\_\_\_\_ Fantasy \_\_\_\_\_

Historical Fiction \_\_\_\_\_ Romance \_\_\_\_\_ Thrillers \_\_\_\_\_

Action/Adventure \_\_\_\_\_ Horror \_\_\_\_\_ Inspirational/Religious \_\_\_\_\_

Science Fiction \_\_\_\_\_ Urban/Hip Hop \_\_\_\_\_ Romantic Suspense \_\_\_\_\_

Western \_\_\_\_\_ Chick Lit \_\_\_\_\_

### FORMATS (check all that apply)

\_\_\_ Large Print preferred

\_\_\_ Paperback binding preferred

\_\_\_ Audiobooks formats: \_\_\_\_\_ CD \_\_\_\_\_ Cassette Tape \_\_\_\_\_ Playaway \_\_\_\_\_ Any

### READING HISTORY

Please list at least 3 of your **favorite** books and/or authors and what you enjoy about them.

Please list up to 3 books or authors you have read and **not** enjoyed.

### PLEASE CHECK YOUR PREFERENCES:

Happy/Light/Uplifting \_\_\_\_\_ Dark/Ironic \_\_\_\_\_ Funny \_\_\_\_\_

Serious \_\_\_\_\_ Safe/Relaxing \_\_\_\_\_ Suspenseful/Tense \_\_\_\_\_

One Plot Line \_\_\_\_\_ Multiple Plot Lines \_\_\_\_\_

Resolved Ending \_\_\_\_\_ Leaves You Thinking \_\_\_\_\_

Focus on Characters \_\_\_\_\_ Focus on Action and Events \_\_\_\_\_

Just a few characters \_\_\_\_\_ Many characters \_\_\_\_\_

Quirky Characters \_\_\_\_\_ Clever Dialogue/Wordplay \_\_\_\_\_

Humorous Situations/Events \_\_\_\_\_ Slapstick/Physical Humor \_\_\_\_\_

Dark Humor/Irony \_\_\_\_\_ Absurd Humor – Bizarre or Surreal \_\_\_\_\_

**SETTING:** Indicate any setting about which you would particularly like to read (country, state, time period)

### PET PEEVES

Sexual Themes \_\_\_\_\_ Explicit Sexual Content \_\_\_\_\_

Rough/Obscene Language \_\_\_\_\_ War \_\_\_\_\_ Violence \_\_\_\_\_

Death \_\_\_\_\_ Disease \_\_\_\_\_ Religion \_\_\_\_\_ Addiction \_\_\_\_\_

Crime Portrayed Sympathetically \_\_\_\_\_

Dark or Cynical Humor \_\_\_\_\_ Death \_\_\_\_\_

**Anything else we should take into account for our suggestions?**

## **Sample 6 – Policy**

**POLICY STATEMENT:** The Homebound Library Service program helps fulfill the library's mission by offering services to residents who are homebound due to illness, disability or age and physically unable to visit the library.

Customers must have a full-service library card to qualify for this service. Customers must complete an application and have it certified by their physician, nurse, or social worker. Applications will then be reviewed by library staff and the customer notified of the beginning service date.

The Library will mail up to two items at a time to customers, including a return-postage paper in the envelope. The customer is responsible for getting the items returned to the library within a reasonable time frame. Additional materials may be requested and sent after the current items checked out are returned. Customers participating in the program will become ineligible for the service if they do not return library materials.

The Homebound Library Service program may be discontinued at any time for any reason.

### Sample 7 – Route Schedule Log

<b>Patron Name</b>	<b>Address &amp; Phone</b>	<b>Estimated Arrival</b>	<b>Estimated Departure</b>	<b>Call In/ Notes</b>
Mr. Jones	123 Main Street Anytown, USA 888-555-5555	1:00 p.m.	1:15 p.m.	
Mrs. Smith	789 Reading Rd Anytown, USA 888-555-5555	1:30 p.m.	2:00 p.m.	

## Sample 8 – Participant Survey

We want to know what you think about our Homebound Services Program. Will you tell us a little bit about yourself and answer a few questions? Please fill out this survey and return it with your materials.

What's your zip code? \_\_\_\_\_

How old is the Homebound Services Program participant?

- 0-19     
  20-24     
  25-39     
  40-54     
  55-69     
  Over 70

What language is spoken most often in your home?

- English     
  Spanish     
  Other - Which one? \_\_\_\_\_

Please circle the number that best describes how much the Homebound Services Program participant agrees/disagrees with these statements.

	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Before joining the Homebound Services Program, I checked out materials from Anytown Public Library.	1	2	3	4	5
After joining the Homebound Services Program, I check out materials at least once a month from Anytown Public Library.	1	2	3	4	5
I have learned something new from the materials received through the Homebound Services Program	1	2	3	4	5
I now have materials to read because of the Homebound Services Program.	1	2	3	4	5

How did you hear about Anytown Public Library's Homebound Services Program?

- Posters around town  
 Newspaper  
 Website  
 Friends/Family member  
 At the Library  
 Other: \_\_\_\_\_

Is there anything you want to tell us about the Homebound Services Program this year? What was your favorite part? What was your least favorite part?

Feel free to use the back of the form for additional comments and thank you for sharing your thoughts.



## Sample 9 – Letter to Churches

Dear Reverend or Imam \_\_\_\_\_,

Do you have members who are homebound and can no longer make it to service because of illness, disability or age? If so, Anytown Public Library shares your concern about their well-being, and has found a way to reach out to your homebound members!

I wanted to let you know that Anytown Public Library has launched a new service which makes library materials available to Anytown residents who are unable to visit our physical library locations due to illness, disability or age. Our *Homebound Library Service Program* participants can borrow books, DVDs, music CDs and more by mail. All items arrive to our homebound residents in their mail box and include a prepaid postage label for return.

To qualify for our Homebound Library Service Program, an individual must have a full service Anytown Public Library card. An application certified by a physician, nurse or social worker is required. Applications can be picked up at any location of the Anytown Public Library. After the application is approved, participants can have up to two items from the library mailed to their home. Additional items may be requested after these items are returned.

If you have members who would be interested in this program, or if you would like additional information, I can be contacted at

---

Thanks so much for your assistance in helping us reach out to your homebound members!

Sincerely,

Homebound Program Coordinator  
Anytown Public Library

## Appendix B – Additional Resources

### **Resources for Statistics and Demographics**

Administration on Aging. (2011). *Aging Integrated Database (AGid)*, <http://agidnet.org/>

Administration on Aging (2010). *Profile of older Americans*.  
[http://www.aoa.gov/AoARoot/Aging\\_Statistics/Profile/index.aspx](http://www.aoa.gov/AoARoot/Aging_Statistics/Profile/index.aspx)

American Community Survey Website. (2011). <http://www.census.gov/acs/www/>

Bureau of Transportation. (2003). *Transportation difficulties keep over half a million disabled at home*.  
[http://www.bts.gov/publications/special\\_reports\\_and\\_issue\\_briefs/issue\\_briefs/number\\_03/html/entire.html](http://www.bts.gov/publications/special_reports_and_issue_briefs/issue_briefs/number_03/html/entire.html)

Federal Interagency Forum on Aging-Related Statistics. (2010). *Older Americans 2010: key indicators of well-being*. U.S. Government Printing Office: Washington;  
[www.agingstats.gov](http://www.agingstats.gov)

National Association of Regional Councils. (2011). *Listing of COGs and NPOs by state*.  
<http://narc.org/regional-councils-mpos/listing-of-cogs-and-mpos-2.html>

National Institute of Mental Health. (2009). *Anxiety disorders*, NIH publication No. 09 3879. U.S. Department of Health and Human Services: Washington;  
<http://www.nimh.nih.gov/health/publications/anxiety-disorders/nimhanxiety.pdf>

U.S. Census Bureau. (2003). *Disability status: 2000*.  
<http://www.census.gov/prod/2003pubs/c2kbr-17.pdf>

U.S. Census Bureau. (2008). *Americans with disabilities: 2005*.  
<http://www.census.gov/prod/2008pubs/p70-117.pdf>

U.S. Census Bureau Website. (2000 and 2010) <http://www.census.gov/>

### **Supplies**

United States Postal Service (USPS) approved online postage vendors  
<https://www.usps.com/business/online-postage.htm?>

A. Rifkin - Mailing bags with sewn in pockets, mailing tags, zip ties  
<http://www.arifkin.com/index.php?section=store&subsection=search&type=subcat&subcatidn=142>

### **Sample Homebound Policies**

Denton Public Library  
<http://www.cityofdenton.com/Modules/ShowDocument.aspx?documentid=7568>

Washington County Cooperative Library [http://www.wcccls.org/library\\_services/homebound](http://www.wcccls.org/library_services/homebound)

Santa Cruz Public Library <http://www.santacruzpl.org/services/detail/31/>

Missouri River Regional Library <http://www.mrrl.org/content/homebound-services-policy>