

## Administrative Rules

Created: 10-2-2007

### Rule 3.3 Administrative Rules

Edited

Approved: 10-29-2007

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#### I. PURPOSE

To establish the criteria for agreements between the Deschutes Public Library System (DPL) and a reciprocal library (RL) under which residents of both libraries would be entitled to use identified library services without paying out-of-district library fees.

Reciprocal borrowing agreements identify the specific services that would be shared, such as:

- On-site circulation;
- Reference services;
- Programming;
- Holds;
- Interloans between the reciprocal libraries;
- Interloans from external libraries.

#### II. POLICY IMPLICATIONS

##### Results Policy:

“Library patrons who are not residents receive the same benefits as District residents as long as the increased competition for District resources will not result in a significant reduction of services to District residents.”  
(Global Results Policy)

“A significant reduction in services” shall be considered to exist when one or more of the following conditions occur as a result of non-resident library usage:

- A 5% or higher staffing increase is needed at a branch library to maintain service levels in areas such as shelving, circulation, and/or programming;
- The local library should be expanded to offset congestion created by providing services to the non-resident population.

##### Executive Limitations Policy:

The Director shall not fail to “enter into partnerships with local agencies whenever such partnerships would be cost-effective and of mutual benefit.” (Management Practices Executive Limitations Policy)

Partnerships shall be considered to be “cost-effective and of mutual benefit” under the following conditions:

- The agreement is between two municipal corporations that allocate revenue to fund public library services;
- It is practical to establish procedures to implement the agreement;
- In instances in which one library provides substantially more services, and when it is determined that providing these services would result in a significant reduction of services to the residents of a participating library, contractual fees are negotiated to offset the impact;
- The costs of negotiating, maintaining, and implementing the reciprocal borrowing agreement can be justified by the estimated benefit to the residents of both library systems.

### **III. BEST PRACTICES AND CRITERIA FOR ESTABLISHING AGREEMENTS**

Best practices indicate that reciprocal borrowing agreements are appropriate under the following conditions:

- The establishment of an agreement supports and does not hinder planned library development within the respective library systems and at the regional level;
- The agreement provides services that supplement adequately funded local library services;
- Both library systems receive roughly offsetting benefits;
- Neither partnering library assumes the service responsibilities of the other without appropriate compensation;
- Residents of the participating libraries receive improved services as a result of the reciprocal borrowing agreement.

A proposed reciprocal borrowing agreement shall be considered to conform to best practices when the following conditions are met:

- Each library system has developed and funded implementation strategies to provide library services throughout their respective service areas, such as branch libraries, bookmobile services, and contractual agreements with neighboring libraries;
- Each library funds collection development that equals or exceeds the median per-capita allocation for Oregon public libraries.

### **IV. PROCESS FOR ESTABLISHING RECIPROCAL BORROWING AGREEMENTS**

Reciprocal borrowing agreements may be established as follows:

1. Informal contact is initiated between DPL and RL to determine a shared interest in establishing an agreement;
2. DPL and RL collect information to complete the “Reciprocal Borrowing Agreement” proposal (see Rule \_\_\_\_ Appendix A: Reciprocal Borrowing Agreement Proposal);
3. The District issues the following findings in the context of the criteria outlined above:
  - Will the proposed agreement result in a significant reduction in services for the residents of the Deschutes Public Library District?
  - Would the proposed agreement be cost effective and of mutual benefit?
  - Would the proposed agreement support local and regional library development?
  - Is the partnering library sufficiently funded to meet its obligations under the agreement?

4. An invitation to participate in a reciprocal borrowing agreement will be issued to the proposed library when the findings in each area support the proposals. If the proposed library wishes to participate in a reciprocal borrowing agreement, an agreement will be negotiated consistent with the criteria outlined in this document.
5. Should DPL decline the proposed reciprocal borrowing agreement, DPL will advise the proposed RL of its findings. DPL will discuss methods of addressing the negative findings with the proposed RL if requested.

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### Reciprocal Borrowing Agreements

#### Appendix A – Reciprocal Borrowing Agreement Proposal

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1. Name of library and contact
2. Contact information for agent of Municipal Corporation authorized to execute legal agreements.
3. List of proposed reciprocal services
4. Current and planned service delivery systems that are currently used by each library to provide services to the populations most likely to utilize the proposed reciprocal services. (Branches, bookmobiles, etc.)
5. Current and two-year projections: total expenditure per capita for library services; expenditure per capita for collection development?
6. Projected usage of reciprocal services by the residents of each library system, including: location of residents likely to use services; library cards; circulation; attendance; and programs. Include a brief explanation of the methodology used to project usage.
7. Discuss how services would be improved and efficiencies be achieved through the proposed agreement