

BLACK GOLD COOPERATIVE LIBRARY SYSTEM

# CIRCULATION AND INTERLIBRARY LOAN MANUAL

August, 2017

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Later additions:

Most loans covered in this manual are between Black Gold member libraries.  
Loans and rules to non-Black Gold libraries are at the discretion of each library jurisdiction.

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## PURPOSE

To serve as a written statement of agreements on circulation and interlibrary loan policies and guidelines of the members of the Black Gold Cooperative Library System. The manual also functions as a compendium of local library circulation and interlibrary loan policies. It is a goal to have and follow uniform policy whenever possible for patron convenience.

## INTRODUCTION

Black Gold Cooperative Library System circulation and interlibrary loan policies and procedures serve as reference for staff members in the Black Gold Cooperative Library System. The manual includes information on patron registration standards, lending materials, renewals, loan periods and notifications, fees and fines, check-in procedures, etc. for each of the member libraries.

An automated circulation system is utilized by Black Gold member libraries to facilitate loaning of materials between jurisdictions. The seven members share the Polaris automated circulation system and are also known as the Automation and Technical Services (ATS) libraries. ATS libraries can lend and borrow from each other using the “holds” feature provided by the automated circulation system.

Holds are placed into the computer at any point in the system, and any point in the system can be designated as the pick-up point. Held books are trapped automatically by the computer and routed to the selected pick up point.

In addition, Black Gold permits holds to be placed through the Web OPAC. The URL for the shared OPAC is [www.blackgold.org](http://www.blackgold.org). The Black Gold office in Grover Beach supports the automated system for its users.

Members of the Black Gold Cooperative Library System:

Blanchard/Santa Paula Public Library	San Luis Obispo County Library
Goleta Valley Library	Santa Barbara Public Library
Lompoc Public Library	Santa Maria Public Library
Paso Robles City Library	

## **NOTIFICATIONS**

(See Appendix for more information and notice text).

To ensure items move to 'Lost' on a patron record, patrons **MUST** have a notification option (other than print) to receive overdue and fine notices. Please see 'patron entry standards' for more information.

Patrons have several options for notifications.

### **AUTOMATED TELEPHONE SYSTEM**

1. Notifies patrons of available holds and overdue.

### **EMAIL**

2. If there is an email address, and an option to receive email is selected in the patron record, the patron will receive holds and overdue notification via email.

### **TEXT MESSAGE**

3. Patrons may also select to receive text messages as a notice delivery option, or in addition to email and telephone notices.

## **OVERDUE NOTIFICATION**

As of January 3, 2011, overdue notices are available by telephone or email/text message only.

### **OVERDUE NOTIFICATION (non-Black Gold libraries)**

Overdue notices to non-Black Gold libraries will be sent by the lending library to the patron in conformance with its internal policy, usually within 5 days after the due date.

## **PAPER NOTIFICATION**

Bills for lost items and fine notices are always in paper format.

## **RENEWALS**

### **AUTO RENEW**

If items can be renewed (renewals available and no holds) they will automatically be renewed by Polaris with an email notification going to the patron. Auto-renewals are done at the same time the reminder notices are sent out.

Renewals of checked out items may be done by:

### TELEPHONE

1. Telephone (iTiva) — The toll free number is (800) 354-9660. Patrons can also reach the system by dialing (805) 546-0499. iTiva follows the standard renewal rules set up on the Polaris system.

### ONLINE

2. Access is provided at [www.blackgold.org](http://www.blackgold.org). Overdue items may be renewed online following standard renewal rules.

## PATRON INFORMATION

### INPUT STANDARDS PATRON REGISTRATION

1. When a patron applies for a library card, check for a pre-existing account. When searching by **name use the patron's last name, comma, and first three letters of the first name**. Confirm date of birth. **Using \* as a wildcard can help yield results**. Other methods are to use the driver's license number in the Unique ID field.

One problem with using the driver's license is that the patron may have used a passport or Matricula Consular\* to obtain the library card.

**\*If the ID is a Matricula Consular, ask the patron what last name they use and then put the other name in the middle name field.**

Please allow yourself the time needed to do these searches, as they are very important to prevent a duplicate card being issued which may bypass a large amount of fines/fees due on an original card.

2. If Step 1 yields no results, perform a second search using patron's date of birth to confirm that no previous account exists.

### BARCODE

Scan account number from library card.

### SCANNER – PATRON ENTRY

As of Polaris 4.1R2 a patron can be registered by scanning a driver's license. All information in the patron record is entered with ALL Caps in this instance. You do not need to change the entry to standards as below (re. Capitalization of first letter only). Please confirm the information on the license is correct.

### LAST NAME

Legal last name printed on identification. First letter capitalized. Names with punctuation or spaces should be entered exactly as seen on the ID.

**INPUT STANDARDS PATRON REGISTRATION** cont.

<b>RULE</b>	<b>EXAMPLE</b>
Enter exactly as spelled on the ID, omitting diacritical marks.	ID: Laurence Quarri <b>Last name:</b> Quarri
If the last name consists of more than one name, enter all parts in the Last name field exactly as ID has it printed.	ID: John Van Duzer <b>Last name:</b> Van Duzer
	ID: James Madison-Park <b>Last name:</b> Madison-Park
	ID: Roberto Gonzales Chavez <b>Last Name:</b> Chavez
	ID: Toby O'Connor <b>Last name:</b> O'Connor
If "Jr" or any other addition appears as a part of the last name, enter it in the <b>Suffix</b> field.	ID: Eli Jackson Jr <b>Last name:</b> Jackson
	ID: John Jones III <b>Last name:</b> Jones

**FIRST NAME**

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized.

<b>RULE</b>	<b>EXAMPLE</b>
Enter exactly as spelled on ID.	ID: Tommy Smith <b>First name:</b> Tommy
If the first name is hyphenated, enter both names in the First name field exactly as printed on ID.	ID: Mary-Jane Jones <b>First name:</b> Mary-Jane
	ID: Jean-Pierre Smith <b>First name:</b> Jean-Pierre

**MIDDLE NAME**

Middle name (initial if full name unavailable)

<b>RULE</b>	<b>EXAMPLE</b>
Enter the whole middle name as spelled	ID: John Quincy Adams <b>Middle name:</b> Quincy
If only a middle initial is available, enter that in the <b>Middle name</b> field. Do <b>not</b> type a period.	ID: Lou Q. Stewart <b>Middle name:</b> Q
If more than one middle name is given, enter them all.	ID: John Francis Xavier Smith <b>Middle name:</b> Francis Xavier

## TITLE/SUFFIX

Use as appropriate

RULE	EXAMPLE
Use the following suffixes: Jr, Sr, II, III, 2 <sup>nd</sup> , 3 <sup>rd</sup>	
Do not use any honorary degree designations (Esq, PhD, etc.)	

## REGISTERED AT

Automatically set

## PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes. The following are examples only:

Adult, Teen, Juvenile, Internet Only (also, add “Internet Only” block to account)

### INPUT STANDARDS PATRON REGISTRATION cont.

## ADDRESS

A valid home address is required for all patrons except for “internet only.” State law requires that patrons receive written notices before being sent to collections.

**It is imperative we have a valid address.**

To add a new address, select “Add” button.

Enter zip code; select city.

If entering two or more addresses identify the mailing address or local address as “Primary.” If entering only one address, leave “Home” as the address type (the default).

For “internet only” patrons, enter “internet only” in the address field and add the library’s zip code.

RULE	EXAMPLE
Enter street address and apartment number (if applicable), or PO box number.	<b>Address:</b> 15 Main St
Do not enter any periods.	<b>Address:</b> 123 W 45 St Apt 67
Use the following abbreviations:	<b>Address:</b> 89 Grand Ave Ste 10
Apartment                      Apt	<b>Address:</b> PO Box 333
Avenue                              Ave	
Boulevard                      Blvd	
Building                              Bldg	



Circle	Cir	
Highway	Hwy	
Lane	Ln	
Place	Pl	
Road	Rd	
Room	Rm	
Street	St	
Suite	Ste	
If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW		<b>Address:</b> W Main St Apt 4B
If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)		<b>Address:</b> 1200 Parks Ave NW
		<b>Address:</b> 13 E 67 St

### TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron’s choice.

RULE	EXAMPLE
Enter the number in the Phone 1 field. If a second number has been provided, enter it in the Phone 2 field.	Telephone #: 805-777-7777

### PHONE FIELD ENTRY GUIDELINES

“Voice phone 1” is a mandatory field in the current automated system. For patrons who do not have a telephone, or refuse to give a telephone number, as of November 17, 2010, the agreed upon standard for this field on the patron registration screen is “none” or “refused” (no note in the patron record).

**Note: The patron notification option selected will need to be something other than telephone if “none” or “refused” is placed in the phone field.**

If a patron refuses to give either an email address or a telephone number, the staff member should put an agreed upon staff email address in the email field. Failure to do so will result in a patron account with fees/fines over \$40 going to Collections without any prior notice, or not going to Collections at all if the notice cycle cannot begin/complete. Email or telephone notification is required for the notice cycle to begin. Telephone overdue/hold notices that are not completed (answered) will roll to print.

### TELEPHONE INPUT STANDARDS FORMAT

The acceptable format for telephone numbers for automated calling is: AAA-PPP-NNNN. “AAA” is area code, “PPP” is prefix, “NNNN” is number.

Some general rules:

- Format applies to all telephone fields in the record.  
**INPUT STANDARDS PATRON REGISTRATION** cont.
- Only one telephone number per field (not “PPP-NNNN or PPP-NNNN” in the same line)
- The iTiva system can only call a direct number. If the phone number contains any of the following, it cannot be used:
  - An extension number
  - A work number that needs to go through a switchboard
  - A call blocking service access number such as \*82
- Words in the telephone number are acceptable as the iTiva system ignores them. Examples: parents home, work, cell.
- **Do no enter any symbols such as # or \*.**
- Do not use a contiguous set of numbers such as 1111111 or 999. This could result in the automated system dialing 9-1-1 as it uses dialing formats to reach outside lines.

## **GENDER**

The default is n/a and should not be changed.

## **STATISTICAL CLASS**

Enter the 4 digit resident/non-resident code if patron resides outside of the default region. For example, 1656 is automatically set for the Lompoc Public Library System. This code is used to acquire Direct Loan statistics.

## **PASSWORD**

Passwords will vary by jurisdiction. Will default overnight to last four digits of phone number if nothing is entered.

## **LANGUAGE**

If the patron has chosen to receive account information in Spanish, change the language field to Spanish. This will allow the patron to receive notifications in Spanish as well.

## **FORMER BARCODE**

If the patron is replacing their card rather than creating a new account, copy and paste the former account number into this field.

## **BIRTHDATE**

Check the birth date box and enter the date of birth, which is required. If patron refuses to provide the year of birth, enter the birth year as 1900.

## UNIQUE ID

Enter the number, followed by the type of ID.

Use these forms of ID in this order:

RULE	EXAMPLE
<b>DRIVER'S LICENSE</b> <ol style="list-style-type: none"><li>1. Enter the number, followed by a space.</li><li>2. Enter the abbreviation of the issuing state, followed by <b>DL</b> to denote Driver's License (with the exception of California which would be entered as <b>CDL</b>).</li><li>3. Do not place a space between the two (i.e., AZDL, no AZ DL).</li></ol>	N6579760 CDL SM541721 WADL
<b>STATE ID</b> Follow the same entry procedure as Driver's License; use <b>ID</b> to denote identification.	N6579760 CID
<b>MILITARY ID</b> Enter the number, followed by a space, then <b>MLID</b>	495950628 MLID
<b>ALIEN RESIDENT NUMBER</b> <ol style="list-style-type: none"><li>1. Enter the number, followed by a space</li><li>2. Enter <b>INSID</b> (Immigration &amp; Naturalization Identification) and the issuing country.</li></ol>	8030497 INSID Mexico
<b>PASSPORT NUMBER</b> <ol style="list-style-type: none"><li>1. Enter the number followed by a space.</li><li>2. Enter <b>PPN</b> followed by a space.</li><li>3. Enter the country of origin, or the country's abbreviation (e.g., USA).</li></ol>	8679023 PPN USA 1234568 PPN FRA

## GUARDIAN

Only use for Juvenile or Teen cards. Input information in Unique ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., N6579760 P/CDL, N6579760 P/CID, 495950628 P/MLD, etc. Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

## DATA ENTRY

Use your library's 2-letter code as used in Polaris and a forward slash and your initials:  
**LM/ss**

## STANDARDS FOR PATRON NOTES IN POLARIS

Select the appropriate type of note to deliver the message to patron and/or staff.

- All notes should be brief and include only pertinent facts.
- All free-text notes should include date first, then Branch/staff initials.
- In Patron Status Notes put most recent note at the top, date first, then Branch/staff initials.

If notes field is full, refer to supervisor for review.

## PATRON REGISTRATION REQUIREMENTS

A jurisdiction should only change another library's patron codes if the individual has moved to that jurisdiction.

TYPE	SP	LM	PR	SLO	SB <sup>1</sup>	SM <sup>2</sup>	GV
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	see below <sup>1</sup>	ID & proof of address	
Group Cards	n/a	n/a	n/a	n/a	see below <sup>1</sup>	n/a	
Juvenile	parent ID	parent ID	parent ID	parent ID	see below <sup>1</sup>	parent ID & proof of address	
Temporary	n/a	n/a	n/a	ID	see below <sup>1</sup>	ID & \$10 deposit, \$20 if no ID	
Youth	parent ID & signature	n/a	parent ID	n/a	n/a	n/a	

<sup>1</sup> SB will issue a card with government-issued ID with photo and proof of address. If there is no proof of address the patron will be asked to write the address on a preprinted confirmation postcard which will be mailed. The subsequent presentation of this card with its postmark shall constitute proof of address. SB issues card to institutions with proper institutional ID and with individual associated with institution accepting personal responsibility.

<sup>2</sup> SM will mail cards to patrons who have no other way to verify their mailing address. Patron is allowed to check out 2 items before card is mailed.

## BEST PRACTICE FOR LIBRARY CLOSURE

- Notification to member libraries – Optimal is at least 3 weeks.
- Holds processing – If library is closed for 3 weeks or less, holds processing remains the same.
- Hold Pickup Point – Remove at library's discretion.
- PAC – If library is closed less than 3 weeks, items will not be removed from the catalog

## LIBRARY CARDS

It is a common practice to issue library cards to individuals only, with the exception of ILL institutions.

Lompoc issues cards to the prison. The prison gets a higher checkout limit and the hold fee is waived.

## **ONLINE REGISTRATION**

Patrons may register online and receive a temporary barcode starting with 'PACReg'. PacReg cardholders may place holds and use online services such as Overdrive. Online registrations should be deleted if there is no activity on the account for more than six months.

## **CARD EXPIRATION**

On March 23, 2013, the Administrative Council voted to set Card Expiration to 99 years. Address Check is determined by jurisdiction.

## **REPLACEMENT LIBRARY CARDS**

No agency charges replacement fees for normal wear and tear or for name changes. Patron must purchase a replacement card if they have lost or misplaced card. An ID is required to replace a library card.

The patron's previous barcode should be noted in the Former Barcode field. This allows staff to verify the previous barcode when troubleshooting OverDrive issues.

~~Santa Maria requires a library card in order to check out material. (DELETE)~~

## **LENDING MATERIALS**

### **CIRCULATING MATERIALS**

Black Gold member libraries make their circulating books available to each other's respective patrons. Requests for individual items are on a "prefer my patron" basis and are processed in accordance with the procedures of the lending library.

Renewal of loan items may be possible.

However, rental collections, defined as books patrons pay to use, are not loaned to other libraries.

Book Club Kits are holdable and are reserved on the PAC. Library branches adding or removing kits should notify the Black Gold System Cataloger so that book club specific fields and supplemental materials may be added to the record. Library should indicate if they will provide supplementary materials or if Black Gold staff should locate generic discussion questions.

## **NON-CIRCULATING MATERIALS INCLUDING REFERENCE, SPECIAL COLLECTIONS AND MICROFORMS**

The loan of reference and special collections items is subject to the lending library's consent, based on considerations such as demand, rarity, and the condition of the requested material. The loan period is determined by the lending library. It is assumed that the items are restricted to use within the receiving library unless special permission to circulation has been granted separately.

### **HOLDS**

#### **HOLD LIMITS**

Effective July 1, 2014, the Administrative Council approved a limit of 10 holds at a time. Patrons will receive a block message if they attempt to place more than that. As of November, 2016, only one hotspot may be placed on hold. For the following patron types the hold limit per account is:  
Institution = 99, Library = 30, Elementary = 5.

Held items will be on the hold shelf for 7 days.

Effective May, 2016, the Administrative Council approved holds placement over the PAC for 'Book Club Kits'. Patrons may place a hold on another jurisdiction's book club kit and pick it up at a library of their choice.

#### **HOLDABLE/NONHOLDABLE PARITY**

On July 27, 2012, the Administrative Council approved a change to the holdable/nonholdable parity policy: within each jurisdiction, the threshold will be parity between holdable and non-holdable (rental and express) copies.

#### **HOLDS (ILL)**

Each library participating in reciprocal borrowing within the Black Gold system agrees to process holds in a timely manner by exercising the hold mechanism in the automated circulation system at least every open day.

As of February 2014, the following jurisdiction is using the handwritten yellow/gold transit slips: Santa Paula.

## UNCLAIMED HOLD ITEMS

Unclaimed report should be run every day in order to transfer items to the next patron. If an item has a status of "Unclaimed" but is not found, wait for 1 month from the unclaimed date and contact the owning library for a shelf check. If it is not located, the item's status should be changed to "Missing" by the owning library.

## Claimed & Missing From Holdshelf Contacts

JURISDICTION	BRANCH	CONTACT	EMAIL ADDRESS	PHONE NUMBER
Lompoc	LM	Christine Bolivar	<a href="mailto:C_Bolivar@ci.lompoc.ca.us">C_Bolivar@ci.lompoc.ca.us</a>	805.875.8789
	LV	Alex Newman	<a href="mailto:A_Newman@ci.lompoc.ca.us">A_Newman@ci.lompoc.ca.us</a>	805.733.3323
Paso Robles	PR	Don Rader	<a href="mailto:drader@prcity.com">drader@prcity.com</a>	805.237.3871
San Luis Obispo	OO	Marci Cunningham	<a href="mailto:mcunningham@slolibrary.org">mcunningham@slolibrary.org</a>	805.781.5777
Santa Barbara	BA	Sandra Vose	<a href="mailto:svose@santabarbaraca.gov">svose@santabarbaraca.gov</a>	805.564.5647
Santa Maria	MM	Selena Fierro	<a href="mailto:sfierro@cityofsantamaria.org">sfierro@cityofsantamaria.org</a>	925.0951 x514
Santa Paula	SP	Nancy Duenas	<a href="mailto:nancy.duenas@blanchardlibrary.org">nancy.duenas@blanchardlibrary.org</a>	525.3615 x101

## RENEWAL LIMITS

On January 27, 2012, the Administrative Council iterated that regardless of fines, patrons should be allowed to renew items.

By common agreement, items may only be renewed according to the owning library's policies. All member libraries allow renewals on most materials except items on hold.

On March 1, 2018, Administrative Council approved increasing the renewal limit to 5 renewals on eligible items.

TYPE	SP	LM	PR	SLO	SB	SM	GV
Audio*	5	5	5	5	5	5	5
Blu-ray/Blu-ray Set	5	5	5	5	5	5	5
Books	5	5	5	5	5	5	5
Book Club Kit	0	0	0	0	0	0	0

DVD/DVDSET	5	5	5	5	5	5	5
Encyclopedia	5	5	5	5	5	5	5
Hotspots <sup>2</sup>	0	0	0	0	0	0	0
ILL – ATS	1	1	1	1	1	1	1
ILL – out of system	contact original library	contact original library	contact original library	contact original library	0-1	contact original library	contact original library
Periodicals	5	n/a	5	5	5	no	5
Reference/ Special Loans	case by case	case by case	no	case by case	case by case	no	
Laptops	n/a	n/a	n/a	n/a	1 <sup>1</sup>	n/a	n/a
Videos	3	n/a	3	n/a	n/a	n/a	3
*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD <sup>1</sup> Laptops loaned to SB in-house patrons only <sup>2</sup> Device suspension for overdue device branch determined. Contact Black Gold to suspend service for device.							

## MATERIAL TYPES

### LENGTH OF LOAN PERIODS BY MATERIAL TYPE

The loan period for most materials is 21 days <sup>1</sup>. Current loan periods (given in number of days) appear in this table according to item type.

TYPE	SP	LM	PR	SLO	SB <sup>1</sup>	SM	GV
Audio*	21	21	21	21	21	21	21
Book	21	21	21	21	21	21	21
Book Club Kit	n/a	42	42	42	42	42	42
DVD/Blu-ray	21	21	21	7	21	21	21
DVDSET/Blu-ray Set (3+ playing surfaces not incl. bonus discs)	21	21	21	21	21	21	21
Express (Book, Music, DVD)	n/a	n/a	7	n/a	7	n/a	n/a
Hotspots <sup>2</sup>	7	7	7	7	7	7	
Laptop	n/a	n/a	n/a	2 hours In-house	1 hour	n/a	
Periodicals	7	n/a	21	21	21	21	
Reference/Special Loans	0 or 7	case by case	case by case	2	case by case	case by case	
Rental Book	21	7	n/a	n/a	n/a	7	
Rental DVD	n/a	3 movies/ 7 series	7	n/a	n/a	3	
Uncataloged Paperback	no limit	n/a	21	no limit	no limit	21	
Video Cassette	21	n/a	n/a	n/a	n/a	n/a	
*Audio includes Book on CD, Book on Tape, Cassette, CD <sup>1</sup> SB – Laptops loaned one hour and to Santa Barbara in-house patrons only <sup>2</sup> No loans on “internet only” patron type (all); No loans to “Juvenile – no internet” patron type (PR)							



## **PAPERBACK**

The definitions and descriptions of “Paperbacks” vary widely, as do the policies concerning them. Variation not only occurs between library jurisdictions, but sometimes between branches within a jurisdiction. The breadth of the variation makes it difficult to be sure that what one library means by “Paperback” is precisely what any other library means by “Paperback.”

### **A PARTIAL LIST OF TYPES OF PAPERBACKS**

Adult:	Cataloged, Uncataloged (short title entries)
Juvenile:	Cataloged, Uncataloged, Generic
Comic Books	
Fotonovelas	
Spanish	

## **OVERRIDING DUE DATES FOR STAFF/OTHERS**

Library staff members are held to the same loan rules as all other patrons. Library staff may not use the Renewal Override, Set Due Date, or any other Polaris function to extend due dates for items checked out to self, other staff members, or the general public without noted approval by a supervisor. Black Gold will periodically run reports listing occurrences of these actions and send to library director. Changing a due date inappropriately may result in disciplinary action.

## **EXCEPTIONS TO OVERRIDES**

It is permissible for library staff to override the hold queue only in these two instances:

1. Patron has found the item in the stacks and presents it for checkout.
2. The item is damaged or has missing parts.

Staff should be sure to reactivate the hold request so that the patron remains at the top of the holds queue.

**MAXIMUM NUMBER OF EACH MATERIAL TYPE  
ALLOWED OUT PER PATRON**

There is no common practice concerning maximum numbers of items allowed to be checked out. Current maximum limits are listed on the following table. When there is a slash between numbers (i.e., 2/6) the first number refers to the daily limit, the second to the total limit.

TYPE	SP	LM	PR	SLO	SB	SM	GV
Total # of All Items	30	50	20	99	99	20/45	
Audio Cassettes	6	n/a	20	n/a	n/a	6	
Blu-ray/Blu-ray Set	4	no limit	20	10	no limit	6	
Books on CD	6	no limit	20	no limit	no limit	6	
Books on Tape	6	n/a	20	n/a	n/a	6	
CDs	6	no limit	20	no limit	no limit	6	
DVD/DVDSET	4	no limit	20	10	no limit	no limit	
Encyclopedia	2	no limit <sup>1</sup>	20	no limit	no limit	6	
Hotspots	1	1	1	1	1	1	
Pamphlets/Vertical Files	no limit	no limit	4/subject/ 20 max	no limit	no limit	5	
Periodicals (same title)	6	n/a	20	no limit	no limit	5A 5J	
Periodicals (total)	6	n/a	20	no limit	no limit	5A 5J	
Videos	4	n/a	20	n/a	n/a	n/a	
<sup>1</sup> LM – Encyclopedias that are part of reference do not circulate.							

**MAXIMUM NUMBER OF ITEMS BY PATRON TYPE  
ALLOWED OUT PER PATRON (TOTAL)**

(This does not supersede limits on the number of types of items.)

TYPE	SP	LM	PR	SLO	SB	SM	GV
Adult	30	50	20	99	99	45	
Juvenile	4 *	50	20	99	99	45	
Temporary	n/a	n/a	n/a	5	n/a	5	
Youth	4 *	n/a	20	n/a	99	45	
*Unless parent approves							

# FEES AND FINES

## SPECIFIC AGENCIES' REPLACEMENT COSTS FOR LOST ITEMS

All member libraries charge replacement fees for lost items. Information about replacement costs is available online in the ILS circulation system. Some locations allows patrons to replace the item themselves. \*<sup>6</sup> A service fee may be charged.

TYPE	SP <sup>1, 4</sup>	LM <sup>2</sup>	PR <sup>2</sup>	SLO <sup>2</sup>	SB <sup>1, 2, 3, 4</sup>	SM <sup>1, 2, 4</sup>	GV
Adult Fiction	35.00	30.00	36.00	30.00 <sup>1</sup>	30.00	35.00	
Adult Non-fiction	40.00	30.00	42.00	35.00 <sup>1</sup>	30.00	40.00	
Audio Cassettes	10.00/ cassette	n/a	n/a	n/a	n/a	10.00/ cassette	
Blu-ray <sup>5</sup>	40.00	20.00	n/a	40.00 <sup>1</sup>	20.00	40.00	
Blu-ray Set	50.00	30.00	n/a	50.00 <sup>1</sup>	20.00	50.00	
Book on CD	10.00/disc	10.00/disc	10.00/disc	20.00/disc	50.00	50.00	
Book on Tape	10.00/ cassette	n/a	n/a	n/a	n/a	10.00/ cassette	
Compact Discs (music)	30.00	10.00	31.00	20.00/disc <sup>1</sup>	20.00	30.00	
DVD	30.00	20.00/2 or less discs	31.00	35.00/disc <sup>1</sup>	20.00	30.00	
DVDSET (3+ playing surfaces not incl. bonus discs)	50.00	30.00/ 3+ discs	50.00	50.00 <sup>1</sup>	20.00/disc	50.00	
Hotspot Unit <sup>7</sup>	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$100/unit	
Hotspot Cord <sup>7</sup>	\$10	\$10	\$10	\$10	\$10	\$10	
Hotspot Charger <sup>7</sup>	\$10	\$10	\$10	\$10	\$10	\$10	
Hotspot Case <sup>7</sup>	\$10	\$10	\$10	\$10	\$10	\$10	
Hotspot SIM Card <sup>7</sup>	\$10	\$10	\$10	\$10	\$10	\$10	
Juvenile Blu-ray	30.00	20.00	n/a	40.00 <sup>1</sup>	30.00	30.00	
Juvenile Fiction	25.00	30.00	26.00	30.00 <sup>1</sup>	30.00	25.00	
Juvenile Non-fiction	25.00	30.00	26.00	30.00 <sup>1</sup>	30.00	25.00	
Laptops	n/a	n/a	n/a	List price	600.00	List price	
Lease Book Fiction	35.00	n/a	n/a	n/a	n/a	35.00	
Lease Book Non-fiction	40.00	n/a	n/a	n/a	n/a	40.00	
Pamphlets	n/a	n/a	5.00	n/a	n/a	3.00	
Paperbacks Chargeable	10.00	10.00	10.00	22.00/Adult 15.00/Juv	10.00	10.00	
Periodicals	8.00	8.00	8.00	8.00	8.00	8.00	
Reference	60.00	60.00	60.00	65.00 <sup>1</sup>	60.00	60.00	
Video Cassettes	25.00	n/a	n/a	n/a	n/a	n/a	

<sup>1</sup> Or list price

<sup>2</sup> Standard practice to not offer refund after 6 months, 3 months for Santa Maria.

<sup>3</sup> Laptops loaned to SB in-house patrons only

<sup>4</sup> If the entire set of multi-disc items needs to be replaced, then the replacement cost will be charged.

<sup>5</sup> Effective June 4, 2010, the Administrative Council approved a \$40 standard replacement cost for Blu-ray.

<sup>6</sup> Effective March 5, 2016, Lompoc will charge a processing fee of \$11 for replacement items brought in by the Patron.

<sup>7</sup> Individual item charges must be added manually to patron account in Polaris.

## REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY

<b>LOMPOC</b>	
Books on CD – full set	50.00
ILL – out of system	Cost of item
Trade paperback	20.00

<b>SAN LUIS OBISPO</b>	
Adult trade paperback	22.00
Juvenile CD-Book	40.00 <sup>1</sup>
Juvenile trade paperback	15.00
<sup>1</sup> Or list price if higher	

<b>SANTA BARBARA</b>	
Laptop	600.00

On July 25, 2013, the Administrative Council approved different default replacement costs for individual jurisdictions.

## BLACK GOLD OVERDUE FINES

Daily <sup>1</sup> charges listed first, followed by the maximum charges per item

<b>TYPE</b>	<b>SP</b>	<b>LM</b>	<b>PR<sup>3</sup></b>	<b>SLO</b>	<b>SB <sup>1</sup></b>	<b>SM <sup>2</sup></b>	<b>GV</b>
Adult Books	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Audios & Books on Tape	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Blu-ray & Blu-ray Set	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	1.00-8.00	.25-8.00
DVD/DVDSET	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	1.00-8.00	.25-8.00
Book Club Kits	n/a	.25-8.00	.25-8.00	.25-8.00	.25-8.00	1.00-8.00	.25-8.00
Express Books	n/a	n/a	.25-8.00	.25-8.00	.25-8.00	n/a	.25-8.00
ILL – out of system	.25-8.00	.50-cost of book	.25-8.00	.25-cost of book	2.00-24.00 or charges billed by lending institution, whichever is greater	.25-8.00	2.00-24.00 or charges billed by lending institution, whichever is greater
Hotspot	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Juvenile Books	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Laptops	n/a	n/a	n/a	n/a	8.00/hour replacement cost	8.00/hour	8.00/hour replacement cost

Paperback Cataloged	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Periodicals	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00	.25-8.00
Reference/Special Loans	.25-8.00	.50-8.00	.25-8.00	1.00-8.00	.25-8.00	.25-8.00	.25-8.00
Rental Books	.25-8.00	1.00-8.00	n/a	n/a	n/a	.25-8.00	n/a
Video Game	.25-8.00	.25-8.00	n/a	.25-8.00	1.00-8.00	.25-8.00	1.00-8.00
Videos	.25-8.00	.25-8.00	n/a	n/a	n/a	n/a	n/a
<sup>1</sup> SB – Laptop fee is per hours; laptops loaned to Santa Barbara in-house patrons only <sup>2</sup> SM – Pamphlets and Spanish paperbacks .25-8.00 <sup>3</sup> PR – Charges billed by lending institution							

### FINE LIMITS ON SERVICE

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SLO</b>	<b>SB</b>	<b>SM</b>	<b>GV</b>
Fine Limits	10.00	10.00	10.00	25.00	10.00	10.00	10.00

### BLACK GOLD FEES AND CHARGES

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SLO</b>	<b>SB</b>	<b>SM</b>	<b>GV</b>
Hold fee *	n/a	n/a	n/a	n/a	n/a	n/a	
Microfilm Requests	case by case	15.00	2.00/roll	2.00/reel	case by case	case by case	
Replacing Cards	1.00 1 <sup>ST</sup> replacement cards; 5.00 thereafter	2.00	1.00	n/a	2.00	1.00	
Requests – out of system	5.00	15.00	2.00	n/a	15.00	4.00	
Temporary Cards	n/a	n/a	n/a	no charge	n/a	10.00 deposit 20.00 if no ID	

\*Effective July 1, 2014, the Administrative Council approved the elimination of an official hold fee. However, if desired, a jurisdiction can manually charge hold fees.

## **CHECK-IN**

### **UNIFORM CHECK-IN PROCEDURES**

Black Gold libraries will check-in all types of materials including books and AV (audio visual) that are returned to their library regardless of which Black Gold library owns the item.

Patrons who happen to see another Black Gold library's item that has been returned to the counter and wants to check it out, may do so if there are no holds on the item. However, returned items that belong to another Black Gold library should not be made browsable for the public, but returned expediently via delivery to the owning library.

### **RFID**

RFID tagged items from a different jurisdiction with incorrect information/blank tags can be programmed by the receiving library or the item may be sent back to the owning library.

### **IN TRANSIT**

Black Gold will run a quarterly In-Transit report for items which have had that status for 1 month or longer. The report will be emailed to the ATS Operations Committee representative. Each library should search its shelves within 2 weeks of receipt of the report and change item status accordingly. Items In-Transit to another library from the owning library should be checked first; then items In-Transit from libraries other than the owning library should be searched.

## **LOST MATERIALS**

On September 24, 2004, at the recommendation of the ATS Operations Committee, the Administrative Council agreed to end the requirement that libraries reconcile payments between libraries for damaged and lost items. It was thought that the administrative costs of keeping and tracking the information cancelled out the amounts collected.

It had been a past practice of Black Gold member libraries to collect money for damaged and lost items on behalf of other jurisdictions and to keep a record of those charges. Twice a year these would be reconciled and payment returned to the owning library.

### **LOST AND PAID ITEMS FROM ANOTHER JURISDICTION**

It is the recommended practice that libraries refund lost and paid for items for no longer than three months after the item has been paid for, in the event a patron returns a lost and paid for item, and the library agrees to refund any part of the payment.

## WAIVING FEES FOR LOST OR DAMAGED ITEMS

When an item has had charges for damages or loss placed on it by a jurisdiction, staff at another jurisdiction will not remove or waive fees without first consulting supervisory staff at the owning library.

### Lost/Missing Items Contacts

Library	Contact	Phone#	Ext.	Fax #	Email
PR	Christiansen, Karen	805.237.3871		805.238.3665	<a href="mailto:kchristiansen@prcity.com">kchristiansen@prcity.com</a>
SLO	Cunningham, Marci	805.781.5777		805.781.1166	<a href="mailto:mcunnigham@slolibrary.org">mcunnigham@slolibrary.org</a>
GO					
SM	Fierro, Selena	805.925.0951	2514	805.922.2330	<a href="mailto:sfierro@cityofsantamaria.org">sfierro@cityofsantamaria.org</a>
LM	Bolivar, Christine	805.875.8785		805.736.6440	<a href="mailto:C_bolivar@ci.lompoc.ca.us">C_bolivar@ci.lompoc.ca.us</a>
SB	Vose, Sandra	805.564.5647		805.564.5660	<a href="mailto:SVose@santabarbara.gov">SVose@santabarbara.gov</a>
SP	Formanek, Justin	805.523.3615	102	805.933.2324	<a href="mailto:Justin.formanek@blanchardlibrary.org">Justin.formanek@blanchardlibrary.org</a>

## T-MOBILE HOTSPOT: SUSPEND/ACTIVATE

Black Gold manages Hotspots for circulation to patrons. When a hotspot is not returned on time, service on that Hotspot should be suspended so the monthly service payment is stopped. It will be up to each library's discretion about how soon they want to suspend service for an overdue or missing device. Call or send an email to BG with device ID and request suspension. *A suspension through T-Mobile is good for 90 days after which it automatically reactivates.* Prior to the 90-day auto-renewal, the library will have to inform BG to either cancel the device or extend the suspension. If a device is cancelled, the library may request a replacement device be ordered. Replacements should be ordered as soon as the device is determined to be lost, do not wait and batch cancellation requests.

To reactivate service on a device that has been suspended, call or send an email to BG with device ID and request re-activation. BG will notify library once item is re-activated.

## BEST PRACTICES FOR DAMAGED ITEMS

When a damaged item is returned to a library, follow the applicable procedure below when the damage is noticed:

IF ITEM IS NOT CHECKED IN:	
IF PATRON IS PRESENT:	IF PATRON IS NOT PRESENT:
<ul style="list-style-type: none"> <li>• Do not check the item in.</li> <li>• Renew item, if necessary.</li> <li>• Tell patron it will stay on their record while it is being evaluated.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>	<ul style="list-style-type: none"> <li>• Do not check the item in.</li> <li>• Renew item, if necessary.</li> <li>• Attempt to contact the patron to let them know that the item will remain on their account and that the item in being forwarded to the owning library.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>
IF ITEM IS CHECKED IN:	
IF PATRON IS PRESENT:	IF PATRON IS NOT PRESENT:
<ul style="list-style-type: none"> <li>• Recheck the item out to the patron.</li> <li>• Tell patron it will stay on their record while it is being evaluated.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>	<ul style="list-style-type: none"> <li>• Recheck the item out to the patron.</li> <li>• Attempt to contact the patron to let them know that the item will remain on their account and that the item in being forwarded to the owning library.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>

## CLAIMS

### CLAIM RETURNED

Claim Returned in Polaris does NOT move to Lost automatically. The item goes to Lost status in Polaris ONLY after going through the entire notice cycle in a patron's account.



Once library staff move an item into claim status (claim returned or claim never had) for a patron, the process becomes manual.

Staff must manually check in that item, which severs the link to the patron's account.

Staff must then move the item to "missing" status manually by opening the item record and changing the status from "on-shelf" to "missing."

All libraries allow patrons to claim that library materials currently out on their cards have been returned. Below are specific library policies for Claim Returned:	
<b>SP</b>	Patrons do not lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at staff discretion.
<b>LM</b>	Patrons are allowed 3 Claim Returned that do not go to lost. These are items owned by Lompoc's system. They do not lose borrowing privileges.
<b>PR</b>	Patrons may lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at the staff's discretion.
<b>SLO</b>	Patrons lose their borrowing privileges when they have 5 current Claim Returned items. Non-system ILL items may not be Claim Returned.
<b>SB</b>	Patrons are allowed 3 Claim Returned that do not go to lost. These are items owned by Santa Barbara Public Library System. They do not lose borrowing privileges.
<b>SM</b>	Up to 2 items may be set to Claim Returned until 6 weeks after due date. Notices sent during search period. If 3 or more items, shelf search has to be done first. Patron is billed for items 6 weeks after due date and then lose borrowing privileges.
<b>GV</b>	

## NUMBER OF CLAIM RETURNED ALLOWED

The table below shows:

- The number of Claim Returned (C/R) items allowed before borrowing privileges are suspended;
- How and when Claim Returned items are set to Lost.

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SLO</b>	<b>SB</b>	<b>SM</b>	<b>GV</b>
Limit of C/R items	case by case	3	no limit	5	3	2	
C/R to lost	manually set @ 60 days *	leave in C/R status	manually set @ 42 days *	leave in C/R status	leave in C/R status	manually set @ 42 days *	

\*Polaris system – Items appear on a sequence of lists throughout a 60-day period.

At the end of the period, staff must manually do 1 of 3 things:

1. Return the item
2. Change the items status to "Missing"

Put a manual replacement charge on the patron's account with a note, if that is the local policy.

## COLLECTION POLICIES

As of October 2012, all Black Gold libraries use Unique Management for collections.

## LOCATION CODES

### LIBRARY JURISDICTION CODES

BLACK GOLD COOPERATIVE SYSTEM LIBRARY JURISDICTION CODES					
<b>B</b>	Santa Barbara		<b>O</b>	San Luis Obispo	
<b>GV</b>	Goleta Valley		<b>PR</b>	Paso Robles	
<b>L</b>	Lompoc		<b>SP</b>	Santa Paula	
<b>M</b>	Santa Maria				

### ATS LIBRARY JURISDICTION AND BRANCH CODES

#### **B Santa Barbara Public Library**

ba Santa Barbara Central  
bc Carpinteria Branch  
be Eastside Branch  
bg \* Goleta Branch  
bl Los Olivos Branch  
bm Montecito Branch  
bs Solvang Branch  
bu Buellton Branch  
by Santa Ynez Branch

#### **G Goleta Valley Library**

#### **L Lompoc Public Library**

lc Charlotte's Web Mobile Library  
lm Lompoc (Main)  
lv Vandenberg Village

#### **M Santa Maria Public Library**

ma Los Alamos  
mc Cuyama Branch  
mg Guadalupe Branch  
mm Santa Maria (Main)  
mo Orcutt Branch

#### **O San Luis Obispo County Library**

oa Atascadero Branch  
ob Bookmobile (out of service)  
oc Cambria Branch  
od SLO Administration  
oe Oceano Branch  
og San Miguel Branch  
oh Shandon Branch  
oi Simmler Branch  
ol Shell Beach Branch  
om Morro Bay Branch  
on Nipomo Branch  
oo San Luis Obispo (Main)  
or Santa Margarita Branch  
os Arroyo Grande Branch  
ot Creston Branch  
ou Cayucos Branch  
oy Los Osos Branch

#### **PR Paso Robles City Library**

prs Library Study Center

#### **SP Blanchard/Santa Paula Public Library**

## **SP Blanchard/Santa Paula Library**

~~\*Note: The "BG" code is used for both Goleta Branch Library and Black Gold office.~~

<b>BLACK GOLD HEADQUARTER CODES</b>			
<b>ATS</b>	Automation and Technical Services	<b>CU</b>	Cataloging Unit
<b>BG*, BGCLS, BGHQ</b>	Black Gold office		

## **DELIVERY**

### **BLACK GOLD DELIVERY**

The Black Gold Cooperative Library System sponsors delivery to each of the member jurisdictions. A summary of the regular schedule follows:	
Monday & Friday (non-holiday weeks)	Deliveries to the main library of all member jurisdictions and to Black Gold headquarters
Wednesday (non-holiday weeks)	Deliveries to the main library of all member jurisdictions, Black Gold headquarters and Kennedy Library at Cal Poly
Holiday week delivery	See current Black Gold Holiday Delivery Schedule for alternate delivery days during certain holiday weeks (posted @ <a href="http://www.ats.blackgold.org">www.ats.blackgold.org</a> )

### **BLACK GOLD DELIVERY SCHEDULE**

<b>Regular Delivery Schedule</b> (last modified 06.14.18)			
<ul style="list-style-type: none"><li>• Times are approximate.</li><li>• Schedules fluctuate with traffic conditions and delivery volume.</li><li>• Delivery schedules are subject to change.</li></ul>			
<b>NORTH ROUTE</b>		<b>SOUTH ROUTE</b>	
8:15 a.m.	Paso Robles		
9:00 a.m.	San Luis Obispo		
9:45 a.m.	Black Gold HQ	8:30 a.m.	Santa Barbara
10:15 a.m.	Santa Maria	9:15 a.m.	Goleta
11:00 a.m.	Lompoc	11:00 a.m.	Lompoc
12:15 p.m.	Santa Maria	12:00 p.m.	Goleta
12:55 p.m.	Black Gold HQ	1:00 p.m.	Santa Barbara
1:25 p.m.	San Luis Obispo	2:30 p.m.	Santa Paula
1:40 p.m.	Cal Poly (Wed only)		
2:25 p.m.	Paso Robles		

## LIBRARY BRANCH DELIVERY SCHEDULES

MULT-BRANCH JURISDICTION DELIVERY			
LOMPOC		SAN LUIS OBISPO	
Tuesday, Thursday	Village	Arroyo Grande	Monday-Friday
		Atascadero	Monday-Friday
SANTA BARBARA		Bookmobile	out of service
Monday, Wednesday, Friday	Buellton	Cambria	Monday-Friday
Monday, Wednesday, Friday	Carpinteria	Cayucos	Tuesday, Thursday
Monday, Wednesday, Friday	Eastside	Creston	Thursday
Tuesday, Thursday, Friday	Goleta	Los Osos	Monday-Friday
Saturday (via Solvang staff)	Los Olivos	Morro Bay	Monday-Friday
Monday, Wednesday, Friday	Montecito	Nipomo	Monday-Friday
Saturday (via Solvang staff)	Santa Ynez	Oceano	Tuesday, Thursday
Monday, Wednesday, Friday	Solvang	San Miguel	Thursday
SANTA MARIA		Santa Margarita	Monday, Wednesday
Every other Monday	Cuyama	Shandon	Thursday
Every Monday	Guadalupe	Shell Beach	Tuesday, Thursday
Every Thursday	Los Alamos	Simmler	Thursday
Monday, Thursday	Orcutt		
SINGLE BUILDING JURISDICTIONS			
BLANCHARD/SANTA PAULA		PASO ROBLES	

## MISC

### LIBRARY HOURS

Via [www.ats.blackgold.org](http://www.ats.blackgold.org) > Admin Resources > Library Hours, there are links to the pages at the member jurisdiction websites that list library hours, phone numbers and locations.

### INTERLIBRARY LOAN CONTACTS

Jurisdiction	ILL Staff	Phone Number
SP	Nancy Duenas	525-3615 x 101
GV		
LM	Sara Bankston	875-8789
PR	Karen Christiansen	237-3871 x801
SLO	Marci Cunningham	781-5777

<b>SB</b>	Dolly Knight Sandra Vose	564-5629 564-5647
<b>SM</b>	Kathy Lambert	925-0994

### LIBRARY FAX NUMBERS

<b>Jurisdiction</b>	<b>Branch</b>	<b>Fax Number</b>
<b>SP</b>		933-2324
<b>GV</b>		
<b>LM</b>	Lompoc (Main)	736-6440
	Village	733-3323 (phone first, shares with voice)
<b>PR</b>		238-3665
<b>SLO</b>	San Luis Obispo (Main)	781-1166
	Arroyo Grande	473-7173
	Atascadero	461-6045
	Cambria	927-3524
	Cayucos	995-0573
	Creston	237-3021
	Los Osos	528-7835
	Morro Bay	772-6396
	Nipomo	929-5476
	Oceano	474-7479
	San Miguel	467-3224
	Santa Margarita	438-4879
	Shandon	237-3022
	Shell Beach	773-2891
	Simmler	475-2759
<b>SB</b>	All branches	564-5626
<b>SM</b>	Santa Maria (Main) (branches do not have faxes)	928-7432

### GLOSSARY

<b>A</b>	Adult
<b>ATS</b>	Automation and Technical Services (BG libraries sharing the ILS)
<b>AV</b>	Audio visual material
<b>BA</b>	Santa Barbara Public Library
<b>BG</b>	Black Gold Cooperative Library System
<b>GV</b>	Goleta Valley Library
<b>ILS</b>	Integrated Library System
<b>J</b>	Juvenile
<b>LM</b>	Lompoc Public Library
<b>MM</b>	Santa Maria Public Library
<b>OO</b>	San Luis Obispo County Library

OPAC	Online Public Access Catalog
PR	Paso Robles City Library
SLO	San Luis Obispo County Library
SB	Santa Barbara Public Library
SM	Santa Maria Public Library
SP	Blanchard/Santa Paula Public Library
TNS	Telephone Notification System
TRS	Telephone Renewal System

## **STATISTICS**

Statistics are dependent on local library policies and local circulation systems. The Black Gold ITS ILS provides statistics monthly to each member library.

## APPENDIX

- NOTICE TEXT
- TYPICAL NOTICE, BILLING, COLLECTION CYCLE - POLARIS
- SUPPLEMENTAL NOTICE PROCESSING EXPLANATION

### NOTICE TEXT

September 2014

<b>Bill (print only)</b>	<b>BILL BODY</b>	
	<b>Custom</b>	These charges have not been paid. Contact your LOCAL LIBRARY within 10 days or your account may be referred to a collection agency.
	<b>Default</b>	THIS IS A BILL. Your account has been charged for failure to return the following items. Please remit payment or contact the library as soon as possible.
<b>Cancel email</b>	<b>CANCEL HEADER</b>	
	<b>Default</b>	Your request has been cancelled
	<b>CANCEL BODY</b>	
	<b>Custom</b>	Material you requested is no longer available. Please contact your local library for more information. Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	Your request for:
	<b>EMAIL FOOTER</b>	
	<b>Custom</b>	View account at <a href="http://www.blackgold.org">www.blackgold.org</a> or renew items via phone at 1-800-354-9660.
	<b>Default</b>	If you do not wish to receive this information via email, please reply to this message or contact the library.
<b>Cancel text</b>	<b>CANCEL BODY</b>	
	<b>Default</b>	Your request has been cancelled for title: [TITLE].
<b>Fines (print only)</b>	<b>FINE HEADER</b>	
	<b>Default</b>	FINE NOTICE
	<b>FINE BODY</b>	
	<b>Custom</b>	This message is to inform you that our records indicate your account has accrued fines/fees that may cause you to be reported to a collection agency. To view your account and see these charges online, go to <a href="http://www.blackgold.org">www.blackgold.org</a> . If you have any questions regarding your account, please call your local library.
	<b>Default</b>	Our records show at least \$50.00 in fines for your account. If not paid, the account may go to collections 2 weeks from the date of this notice.

<b>Hold email</b>	<b>HOLD HEADER</b>	
	<b>Default</b>	Requested items are ready for you
	<b>HOLD BODY</b>	
	<b>Custom</b>	Material you requested is available for pickup and will be held until the date listed below. Please disregard this notice if this item(s) have already been picked up. Please bring your library card when picking up the item(s). Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	The following items are being held for you at the library. Please pick the items up on or before the date indicated.

<b>NOTICE TEXT</b> cont.		
<b>Hold mail (only if phone not answered)</b>	<b>HOLD HEADER</b>	
	<b>Default</b>	Requested items are ready for you
	<b>HOLD BODY</b>	
	<b>Custom</b>	Material you requested is available for pickup and will be held until the date listed below. Please disregard this notice if the item(s) have already been picked up. Please bring your library card when picking up the item(s). Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	The following items are being held for you at the library. Please pick the items up on or before the date indicated.
<b>Hold text</b>	<b>HOLD BODY</b>	
	<b>Default</b>	You may pickup [TITLE] at [BRANCH] until [DATE].
<b>Overdue email</b>	<b>OVERDUE HEADER</b>	
	<b>Custom</b>	1 <sup>st</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	<b>OVERDUE BODY</b>	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	<b>OVERDUE HEADER</b>	
	<b>Custom</b>	2 <sup>nd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	<b>OVERDUE BODY</b>	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	<b>OVERDUE HEADER</b>	
	<b>Custom</b>	3 <sup>rd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	<b>OVERDUE BODY</b>	
	<b>Custom</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return



		these items as soon as possible or you will be billed a replacement fee.
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Overdue mail (only if phone not answered)</b>  <b>Overdue mail (only if phone not answered) cont.</b>	OVERDUE HEADER	
	<b>Custom</b>	1 <sup>st</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	NOTICE TEXT cont.	
	<b>Custom</b>	2 <sup>nd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	3 <sup>rd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Custom</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these item(s) as soon as possible or you will be billed a replacement fee.
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Overdue text</b>	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Reminder email (email only)</b>	OVERDUE HEADER	
	<b>Custom</b>	Status of Library Items
	OVERDUE BODY	
	<b>Default</b>	JUST A REMINDER. The following items are due back to the library on the dates indicated. Please return or renew these items at your convenience.

## TYPICAL NOTICE, BILLING, COLLECTION CYCLE – POLARIS

3 Days after due date	<b>First Overdue Notice</b> “These items(s) are OVERDUE. Please return them to avoid increasing fines.”
10 Days after due date	<b>Second Overdue Notice</b> “The following item(s) are OVERDUE. Please return them as soon as possible to avoid increasing fines.”
24 Days after due date	<b>Third Overdue Notice</b> “FINAL NOTICE to return item(s) listed. If not returned you will be billed replacement cost. Contact YOUR LOCAL LIBRARY if you have questions.”
42 Days after due date	<b>Replacement Bill</b> “The following item(s) have been charged as lost. It is possible you may owe additional money for other items on your account.” When Polaris sends the bill the item is changed to ‘lost’ on the patron account.
After total of 63 days since overdue	Patron account goes to Unique Management Services, must have over \$40 in fines/fees. \$10 in collection agency fees applied to patron account.
Unique Management Services letters	<b>1<sup>st</sup> Letter</b> sent immediately upon receiving collections report from Black Gold (reports are now sent daily).
	<b>2<sup>nd</sup> Letter</b> sent 3 weeks after 1 <sup>st</sup> letter.
	<b>Reminder Letter</b> sent if patron has responded and there is a balance remaining.
Unique Management Services telephone call(s)	If patron has remaining balance 14 days after last letter, UMS will begin calling person.
Overdue and Bill notices are sent using the 'lending library' address. Fine notices are sent using the patron's registered library.	

Email, print, text and telephone notifications are sent daily (phone notices are not sent on Sundays).

If the telephone call attempts fail on overdue/hold notices (5 attempts made – 3 per cycle), then the notice goes to paper.

These attempts begin on the days noted in this cycle. If they fail, it can delay the receipt of the notification.

- Phone notices are sent:  
     9:30 am – 6:00 pm, 7:00 pm – 8:00 pm Monday-Friday (2 cycles)  
     10 am – 6:00 pm Saturday (1 cycle)
- Fee notices and Bills are sent by printed notice only.
- Almost overdue notices are sent by email only.
- Text notices occur twice per day: 7:30 am, 4:30 pm

Encourage patrons to use email, phone or text notifications methods!  
 SUPPLEMENTAL NOTICE PROCESSING EXPLANATION

