



LIBRARY OPERATIONS COMMITTEE AGENDA Wednesday, November 6, 2024– 10:00 a.m. Webinar

- 1) **10:00 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding
Recorder; Brenda Goldy, Blanchard Library.
- 2) **ADOPT AGENDA** —
- 3) ****APPROVE MINUTES** — September 4, 2024, by Meg Weber (PR)
- 4) **CIRCULATION**
 - a) **Reports**
 - i) **Report 975** - Displays items with top # of checkouts for weeding by collections and branch. Demonstrate ability to select more than one collection at a time.
 - ii) **Report 983** – Incorrect Age Category Patrons Including Date Last Seen. Original report created by Theo (LM); Last Seen option added by GF (BG). View patrons with the wrong patron type listed by branch.
 - b) ***Circ Manual – Circulation** – Review the Circulation portion of the Circulation Manual for changes. Special attention to the tables included in the section for updates by library.
- 5) **TECHNICAL**
 - a) **Alexander Street Videos** – Discussion – Preview what the Alexander Street collection looks like in the Aspen catalog. Discuss other options for display and determine what libraries prefer.
 - b) **CloudNine – Discussion** – Although they will support PCRes after December 31, 2024, Envisionware will no longer be providing any updates to the product. Instead, they are promoting their web-based product CloudNine Reservation Service, to include not only computers, but room bookings, 3D printer time, game console use, etc. Discuss the possibility of a future live product presentation by Envisionware.
 - c) **Koha/Aspen Issues** – Discussion – A chance to talk about issues happening in Koha or Aspen. Discuss possible changes of global settings to optimize Koha functionality.
- 6) **BLACK GOLD UPDATE**
- 7) **ROUNDTABLE**
- 8) **ITEMS TO BE FORWARDED**
- 9) **AGENDA BUILDING**
- 10) **NEXT MEETING** — 10:00 a.m., Wednesday, January 8, 2024 (Online)
- 11) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Meg Weber, PR; Joanne Britton-Holland SM; Shannon St. Arnaud, SM; Dominic Keen, LM; Lyric Nicolini, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];

Circulation

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.

One exception to standard loan practices is Leased Collections (copies of high demand titles with no additional charge). These items can only be checked out from and returned to the owning jurisdiction; they are not holdable throughout Black Gold. Hold limits are determined by Branch.

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. The 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.

The current holds limit is 20.

This varies by jurisdiction.

Held items will be on the hold shelf for 10 open 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. The Library of Things holds are determined at the jurisdictional level but should not exceed the maximum hold limit of 10.

HOLDABLE/NONHOLDABLE PARITY

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

UNCLAIMED HOLD ITEMS

Unclaimed reports should be run every day 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.

Located in "Holds waiting over 10 days" tab in Koha. The tab is in the Circulation module under "Holds awaiting pickup."

The patron is also contacted to determine if they have the item.

Claimed & Missing from Hold shelf Contacts

JURISDICTION	BRANCH	CONTACT	EMAIL ADDRESS	PHONE NUMBER
Goleta	GO	Nicole Lvoff	nlvoff@cityofgoleta.org	805.964.7878
Carpinteria	CC	Eric Castro	ericc@carpinteriaca.gov	805.684.4314
Lompoc	LM	Dominic Keen	D_keen@ci.lompoc.ca.us	805.875.8789
	LV	Sierra Foster	S_foster@ci.lompoc.ca.us	805.733.3323
Paso Robles	PR	Don Rader	drader@prcity.com	805.237.3871
Santa Maria	MM	Stacy Brigman	sxbrigman@cityofsantamaria.org	805.925.0994x1508
Santa Paula	SP	Nancy Duenas	nancy.duenas@blanchardlibrary.org	525.3615x 102

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, the Administrative Council approved increasing the renewal limit to 5 renewals on eligible items.

TYPE	SP	LM	PR	SM	GV	CC
Audio*	3	3	3	3	3	3
Blu-ray/Blu-ray Set	3	3	3	3	3	n/a
Books	3	3	3	3	3	3
Book Club Kit	0	0	0	0	0	0
DVD/DVDS ET	3	3	3	3	3	3
Encyclopedia	3	3	3	3	3	3
Hotspots ²	0	0	0	0	0	0
ILL – ATS	1	1	1	1	1	1
ILL – out of system	contact original library	contact original library	contact original library	contact original library	contact original library	contact original library
Library of Things	0	0	0	0	0	0
Passes	3					3
Periodicals	3	n/a	3	no	3	3
Read Along	3	3	3	3	3	3
Reference/Special Loans	case by case	case by case	case by case	no	n/a	Case by case
Tablet		n/a	n/a	n/a	n/a	n/a
Laptops	0	n/a	0	0	n/a	n/a
Videos	3	n/a	n/a	n/a	n/a	n/a
Connectivity Kits	0					

*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along
² Device suspension for overdue device branch determined. Contact Black Gold to suspend service for device.

³Lompoc Bookmobile items have a renewal of 1.

MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE

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

TYPE	SP	LM	PR	SM	GV	CC
Audio*	21	21	21	21	21	21
Book	21	21	21	21	21	21
Book Club Kit	n/a	42	42	42	42	42
Connectivity Kit	21					
DVD/Blu-ray	21	21	21	21	21	21
DVDSET/Blu-ray Set (3+ playing surfaces not incl. bonus discs)	21	21	21	21	21	21
Hotspots ²	7	7	7	7	7	7
Laptop	In-house	n/a	7	7	2 hours in-house	7 hours in-house
Library of Things	21	n/a	n/a	21	21	21
Passes	21	7	21	7	21	7
Playaway	n/a					
Periodicals	7	n/a	21	21	21	21
Reference/Special Loans	0 or 7	case by case	case by case	case by case	Case by case	Case by case
Special Loan			42			
Tablet	21					
Uncatalogued Paperback	no limit	n/a	n/a	21	No limit	No limit

*Audio includes Book on CD, Book on Tape, Cassette, CD
² 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, Uncatalogued (short title entries)

Juvenile: Cataloged, Uncatalogued, 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 Koha function to extend due dates for items checked out to self, other staff members, or the public without noted approval by a supervisor. 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 the maximum numbers of items allowed to be checked out. Current maximum limits are listed in the following table.

Total # of All Items	50	50	50	50	99	50
Audio Cassettes	n/a	n/a	50	n/a	n/a	n/a
Blu-ray/Blu-ray Set	10	no limit	50	50	99	n/a
Books on CD	10	no limit	50	50	99	50
Books on Tape	n/a	n/a	50	n/a	n/a	n/a
CDs	n/a	no limit	50	50	99	50
DVD/DVDSET	10	no limit	50	50	99	50
Encyclopedia	No limit ¹	no limit ¹	50	50	n/a	n/a
Hotspots	1	1	1	1	1	1
Library of Things	1	1	1	1	3	3
Pamphlets/Vertical Files	no limit	no limit	50	5	99	3
Passes	1	1	1	1	1	1
Periodicals (same title)	10	n/a	50	5A 5J	99	6
Periodicals (total)	10	n/a	50	5A 5J	99	6
Videos	n/a	n/a	50	n/a	n/a	n/a
Connectivity Kit	1 ²	n/a	n/a	n/a	n/a	n/a
¹ LM, SP – Encyclopedias that are part of reference do not circulate. ² SP – 6-month waiting period for new library card holders.						

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	SM	GV	CC
Adult	50	50	50	50	99	50
Juvenile	50	50	50	50	99	50
Student	n/a	n/a	5	n/a	n/a	n/a
Welcome	3	5	5	n/a	n/a	n/a
Teen	n/a	n/a	50	50	99	50

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 allow patrons to replace the item themselves. *A service fee may be charged.

TYPE	SP ^{1,4}	LM ²	PR ²	SM ^{1,2,4}	GV	CC
Adult Fiction	35.00	30.00	37.00	35.00	35.00	30.00
Adult Non-fiction	40.00	30.00	43.00	40.00	40.00	30.00
Audio Cassettes	n/a	n/a	n/a	n/a	n/a	n/a
Blu-ray 5	40.00	20.00	n/a	40.00	25.00	n/a
Blu-ray Set	50.00	30.00	n/a	50.00	36.00	n/a
Book on CD	10.00/disc 50.00 set	10.00/disc	75.00	50.00	51.00	20.00 disc 50.00 set
Book on Tape	n/a	n/a	n/a	n/a	n/a	n/a
Compact Discs (music)	n/a	10.00	n/a	30.00	20.00	20.00
DVD	30.00	20.00/2 or less discs	21.00	30.00	25.00	20.00
DVDSET (3+ playing surfaces not incl. bonus discs)	50.00	30.00/3+ discs	50.00	50.00	36.00	30.00/set
Hotspot Unit ⁷	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$103.00	\$100/unit
Hotspot Cord ⁷	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot Charger ⁷	10.00	10.00	10.00	10.00	10.00	10.00

Hotspot Case ⁷	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot SIM Card ⁷	10.00	10.00	10.00	10.00	10.00	10.00
Juvenile DVD	30.00					
Juvenile Blu-ray	30.00	20.00	n/a	30.00	25.00	n/a
Juvenile Fiction	25.00	30.00	29.00	25.00	25.00	25.00
Juvenile Non-fiction	25.00	30.00	29.00	25.00	25.00	25.00
Laptops	1200.00	n/a	800.00	List price	n/a	300.00
Lease Book Fiction	35.00	n/a	n/a	35.00	n/a	n/a
Lease Book Non-fiction	40.00	n/a	n/a	40.00	n/a	n/a
Library of Things	Actual Cost	n/a	n/a	n/a	Actual Cost	Actual Cost
Pamphlets	n/a	n/a	5.00	3.00	n/a	n/a
Paperbacks Chargeable	10.00	10.00	15.00	10.00	n/a	n/a
Periodicals	8.00	8.00	9.00	8.00	8.00	10.00
Read Along/VOX	n/a	n/a	n/a	n/a	n/a	n/a
Reference	60.00	60.00	43.00	60.00	62.00	60.00 ¹
Video Cassettes	n/a	n/a	n/a	n/a	n/a	n/a
Juvenile BkCD	10.00 disc. 50.00 set		50.00			
Juvenile BK + CD	30.00		25.00			
Book Club Kit	n/a		180.00			

¹ Or list price

² Standard practice to not offer refund after 6 months, 3 months for Santa Maria, 3 months for Lompoc.

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

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

⁶ Individual item charges must be added manually to patron account in Koha.

REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY

LOMPOC

Books on CD – full 50.00

set

ILL – out of system Cost of item

Trade paperback 20.00

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

*PR & SP charges \$10.00 processing fee for items replaced by patrons. SM charges \$5.

BLACK GOLD OVERDUE FINES

Daily¹ charge listed first, followed by the maximum charges per item.

TYPE	SP	LM	PR ³	SM ²	GV	CC
Adult Books	0	0	0	.25-8.00	0	0
Audios & Books on CD	0	0	0	.25-8.00	0	0
Blu-ray & Blu-ray Set	0	0	0	.25-8.00	0	n/a
Connectivity Kits	5.00 – 150	0	0	.25 – 8.00		
DVD/DVDSE T	0	0	0	.25-8.00	0	0
Book Club Kits	n/a	0	0	1.00-8.00	0	0
Express Books	n/a	0	0	n/a	0	0
ILL – out of system	Lending institution charges	0	0	.25-8.00	0	0
Hotspot	1.00-30.00	0	0	.25-8.00	0	0
Juvenile Books	0	0	0	.25-8.00	0	0
Laptops	8.00-1200.00	0	n/a	.25 -8.00	0	0
Library of Things	n/a	0	n/a	.25-8.00	0	0
Paperback Cataloged	0	0	0	.25-8.00	0	0
Periodicals	0	0	0	.25-8.00	0	0
Reference/Special Loans	0	0	0	.25-8.00	0	0
Video Game	0	0	n/a	.25-8.00	0	n/a
² SM – Pamphlets and Spanish paperbacks .25-8.00						
³ PR – Charges billed by lending institution.						

FINE LIMITS ON SERVICE

	SP	LM	PR	SM	GV	CC
Fine Limits	10.00	10.00	10.00	10.00	10.00	10.00

BLACK GOLD FEES AND CHARGES

	SP	LM	PR	SM	GV	CC

Hold fee *	n/a	n/a	n/a	n/a	n/a	n/a
Microfilm Requests	n/a	n/a	2.00/roll	n/a	n/a	n/a
Replacing Cards	1.00* **	2.00	1.00	1.00	2.00	1.00
Requests – out of system	Case by case	15.00	n/a	15.00	15.00	15.00
Temporary Cards	n/a	n/a	n/a	10.00 deposit 20.00 if no ID	n/a	n/a
<p>*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.</p> <p>**Effective October 2020, Administrative Council voted to drop fines to \$0.00 for the Cataloging Branch which controls CAPIRA (app) and ITIVA (phone renewal) fines charged at renewal.</p> <p>***1ST replacement cards; 5.00 thereafter</p>						

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. Library of Things (LOT) items should be checked in and returned at the owning library. If a LOT item is returned to a non-owning library, it should be checked in and placed in transit/sent back to the owning library immediately after check in.

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. The exception to this is items that are a part of a 'LOT' collection. LOT items may not be immediately checked out upon return. 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.

IN TRANSIT

The report will be available in Koha reports under custom reports for each jurisdiction. 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. It is recommended that libraries run the report on a quarterly basis as a Best Practice.

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.

REFUNDS FOR LOST AND PAID ITEMS

Refund practices vary by jurisdiction. Patrons must apply for a refund (if applicable) at a library within the jurisdiction where the charges for the lost item were paid.

Jurisdiction	Refund Given and Timeframe
PR	Yes, within 3 months of payment for the lost item
GO	No refunds
SM	No refunds
LM	Yes within 3 months of payment for the lost item
SP	Yes within 12 months
CC	Yes within 12 months

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 that have an existing item attached to the patron account without first consulting supervisory staff at the owning library. An exception to this is made for juvenile/teen patron types aging up to an adult patron for “deleted” item charges only. In this case, charges associated with a “deleted” item in the juvenile/teen account would be removed prior to the change in patron type, or if the patron in the juvenile or teen patron category is to be deleted from Polaris Koha.

Lost/Missing Items Contacts

Library	Contact	Phone #	Ext.	Email
PR	Christiansen, Karen	805.237.3871		kchristiansen@prcity.com
GO	Ronkainen, Jil	805.964.7878		jronkainen@cityofgoleta.org
SM	Brigman, Stacy	805.925.0994	1508	sxbrigman@cityofsantamaria.org
LM	Keen, Dominic	805.875.8789		D_keen@ci.lompoc.ca.us
SP	Duenas, Nancy	805.523.3615	102	Nancy.duenas@blanchardlibrary.org
CC	Casto, Eric	805.684.4314		ericc@carpinteriaca.gov

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

CLAIMS

CLAIM RETURNED

Claim Returned in Koha does NOT move to Lost automatically.

Once library staff move an item into claim status (Claims Returned/Claims 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:

SP Patrons do not lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at staff discretion.

- LM** 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.
- PR** Patrons may lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at the staff’s discretion.
- SM** 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.
- GV** Patrons are allowed 3 Claim Returned that do not go to lost. These are items owned by Goleta’s system. They do not lose borrowing privileges.
- CC** Patrons do not lose borrowing privileges due to the number of their Claim Return items. Items are Claim returned at staff discretion.

NUMBER OF CLAIM RETURNED ALLOWED

The table below shows:

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

	SP	LM	PR	SM	GV	CC
Limit of C/R items	case by case	3	Case by case	2	3	Case by case
C/R to lost	Case by case	leave in C/R status	Case by case	manually set @ 42 days *	Leave in C/R status	Leave in C/R status

*Koha 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”
3. Put a manual replacement charge on the patron’s account with a note, if that is the local policy.