

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.

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 can be 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

In general, Patrons are allowed to place up to 20 holds on items. Hotspots are limited to one hold per patron. Libraries of Things hold limits are determined by jurisdiction. 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 10 open days. **Propose changing it to 7 days.**

HOLDABLE/NONHOLDABLE PARITY

Non-holdable items at any jurisdiction cannot exceed the number of holdable items.

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 #
Goleta	GO	Emery Baty	ebaty@cityofgoleta.org	805.964.7878
Carpinteria	CC	Eric Castro	ericc@carpinteriaca.gov	805.684.4314
Lompoc	LM	Michelle Homsher	M_homsher@ci.lompoc.ca.us	805.875.8784
	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	Shannon St. Arnaud	sstarnaud@cityofsantamaria.org	805.925.0994x 1684
Santa Paula	SP	Nancy Duenas	nancy.duenas@blanchardlibrary.org	525.3615x 102

RENEWAL LIMITS

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.

As a general rule, patrons are allowed 3 autorenewals unless a hold is placed on an item.

Renewal limits by Item type

TYPE	SP	LM³	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	1
Hotspots	0	0	0	0	0	0
ILL – out of system	contact original library	n/a	contact original library	contact original library	contact original library	n/a
Library of Things	0	0	0	0	3	0
Passes	3	0	n/a	n/a	n/a	0
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	In-house use only
Laptops	0	0	0	0	n/a	0
Connectivity Kits	0	0	n/a	0	n/a	0
*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along 3 Lompoc Bookmobile items have a renewal of 1.						

LOAN PERIODS BY ITEM TYPE BY BRANCH

As a general rule, the loan period for most materials is 21 days, exceptions listed below.

TYPE	SP	LM	PR	SM	GV	CC
Audio ¹	21	21	21	21	21	21
Book	21	21	21	21	21	21
Book Club Kit	42	42	42	42	42	42
Connectivity Kit ⁴	21	7	n/a	7	n/a	7
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 ³	7	7	7	7	7	7
Laptop	In-house	In-house	7	7	n/a	7 hours in-house
Library of Things	21	7	n/a	21	21	7
Passes	21	7	21	7	21 ²	7
Playaway	n/a	n/a	21	7	21	n/a
Periodicals	7	n/a	21	21	21	21
Reference/Special Loans	0 or 7	0	case by case	case by case	Case by case	0
Special Loan		7	42			7
Tablet	21	n/a				n/a
Uncatalogued Paperback	no limit	n/a	n/a	21	No limit	No limit

¹Audio includes Book on CD, Book on Tape, Cassette, CD
²Moxi passes = 7 days
³No loans to "internet only" patron type (all); No loans to "Juvenile – no internet" patron type (PR)
⁴No loans to "Welcome" patron types.

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 Override Renewal Restrictions, Renewal 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 FOR HOLDS

1. 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.
2. Staff should be sure to reactivate the hold request so that the patron remains at the top of the holds queue. Select checkout option. Do not cancel hold.

MAXIMUM NUMBER OF EACH MATERIAL TYPE ALLOWED OUT PER PATRON

There is no common practice concerning the maximum number of items allowed to be checked out. Current maximum limits are listed in the following table.

TYPE	SP	LM	PR	SM	GV	CC
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 ¹	5	no limit	50	50	n/a	n/a
Hotspots ²	1	1	1	1	1	1
Library of Things	1	1	1	1	3	3
Pamphlets/Vertical Files	no limit	n/a	50	n/a	99	n/a
Passes	1	1	1	1	1	1
Periodicals (same title)	10	n/a	50	50	99	6
Periodicals (total)	10	n/a	50	50	99	6
Videos	n/a	n/a	50	n/a	n/a	n/a
Connectivity Kit ²	1	1	n/a	1	n/a	1

¹ LM, SP – Encyclopedias that are part of reference do not circulate.
² SP – 3-month waiting period for new library card holders. LM 6 month waiting period for LoT, Moxi passes, hotspots, connectivity kits.

Juvenile DVD	30.00	20.00		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	700.00	800.00	List price	n/a	300.00
Lease Book Fiction	35.00	n/a	n/a	n/a	n/a	n/a
Lease Book Non-fiction	40.00	n/a	n/a	n/a	n/a	n/a
Library of Things	Actual Cost	Case by case	n/a	List price	Actual Cost	Actual Cost
Pamphlets	n/a	n/a	5.00	n/a	n/a	n/a
Paperbacks Chargeable	10.00	10.00	15.00	10.00	n/a	n/a
Periodicals	8.00	n/a	9.00	8.00	8.00	10.00
Read Along/VOX	n/a	50.00	n/a	20.00	n/a	n/a
Reference	60.00	60.00	43.00	60.00	62.00	60.001
Trade Paperback	n/a	20.00	n/a	n/a	n/a	n/a
Video Games	n/a	n/a	n/a	n/a	n/a	50.00
Juvenile BkCD	10.00 disc. 50.00 set	50.00	50.00	50.00		
Juvenile BK + CD	30.00	n/a	25.00			
Book Club Kit	180.00	200.00 or 20.00 per book	180.00	180.00		

¹ Or list price

² Standard practices to not offer refund after 6 months for PR, 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 PR & SP charges \$10.00 processing fee for items replaced by patrons.

⁷ Individual item charges must be added manually to patron account in Koha.

BLACK GOLD FEES AND CHARGES

	SP	LM	PR	SM	GV	CC
Microfilm Requests	n/a	n/a	2.00/roll	n/a	n/a	n/a
Replacing Cards	1.00 ¹	2.00	1.00	1.00	2.00	1.00
Requests – out of system	Case by case	n/a	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
¹ 1 st replacement cards; 5.00 thereafter						

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 (Needs Review)

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'.

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	St. Arnaud, Shannon	805.925.0994	1684	sstarnaud@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	Castro, 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. Staff will look for it for over 3 months. Patron will be charged if not found after 3 months.
- 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	90 days	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.

