

BLACK GOLD COOPERATIVE LIBRARY SYSTEM

# CIRCULATION AND INTERLIBRARY LOAN MANUAL

January 20, 2023

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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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## Table of Contents

PURPOSE.....	4
INTRODUCTION.....	4
NOTIFICATIONS.....	4
AUTOMATED TELEPHONE SYSTEM .....	5
EMAIL .....	5
TEXT MESSAGE .....	5
OVERDUE NOTIFICATION .....	5
OVERDUE NOTIFICATION (non-Black Gold libraries).....	5
PAPER NOTIFICATION.....	5
RENEWALS .....	5
AUTO RENEW.....	5
TELEPHONE .....	5
ONLINE.....	6
PATRON INFORMATION .....	6
INPUT STANDARDS PATRON REGISTRATION.....	6
BARCODE .....	6
SCANNER – PATRON ENTRY.....	6
LAST NAME.....	7
FIRST NAME .....	7
PATRON CODE.....	8
ADDRESS.....	8
TELEPHONE/EMAIL, ETC. ....	9
PHONE FIELD ENTRY GUIDELINES .....	9
TELEPHONE INPUT STANDARDS FORMAT.....	11
PASSWORD.....	11
PREVIOUS BARCODE.....	11
UNIQUE ID .....	11
GUARDIAN.....	12
STANDARDS FOR PATRON NOTES IN Koha .....	13
PATRON REGISTRATION REQUIREMENTS.....	13
BEST PRACTICE FOR LIBRARY CLOSURE.....	14
LIBRARY CARDS .....	14
ONLINE REGISTRATION .....	14
CARD EXPIRATION .....	14
REPLACEMENT LIBRARY CARDS.....	14
LENDING MATERIALS.....	14
CIRCULATING MATERIALS.....	14
NON-CIRCULATING MATERIALS.....	15
HOLDS.....	15
HOLD LIMITS.....	15
HOLDABLE/NONHOLDABLE PARITY .....	16
HOLDS (ILL) .....	16
UNCLAIMED HOLD ITEMS .....	16
RENEWAL LIMITS.....	17
MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE .....	18
PAPERBACK .....	18

OVERRIDING DUE DATES FOR STAFF/OTHERS .....	19
EXCEPTIONS TO OVERRIDES .....	19
MAXIMUM NUMBER OF EACH MATERIAL TYPE .....	19
MAXIMUM NUMBER OF ITEMS BY PATRON TYPE .....	20
FEEES AND FINES.....	20
SPECIFIC AGENCIES' REPLACEMENT COSTS FOR LOST ITEMS.....	20
REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY.....	21
BLACK GOLD OVERDUE FINES .....	22
FINE LIMITS ON SERVICE .....	22
BLACK GOLD FEES AND CHARGES.....	22
CHECK-IN.....	23
UNIFORM CHECK-IN PROCEDURES.....	23
RFID.....	23
IN TRANSIT .....	23
LOST MATERIALS.....	24
REFUNDS FOR LOST AND PAID ITEMS .....	24
WAIVING FEES FOR LOST OR DAMAGED ITEMS .....	24
Lost/Missing Items Contacts .....	24
HOTSPOT: SUSPEND/ACTIVATE .....	25
BEST PRACTICES FOR DAMAGED/INCOMPLETE ITEMS.....	26
CLAIMS.....	27
CLAIM RETURNED .....	27
NUMBER OF CLAIM RETURNED ALLOWED .....	27
COLLECTION POLICIES.....	28
LIBRARY JURISDICTION CODES .....	28
ATS LIBRARY JURISDICTION AND BRANCH CODES.....	28
DELIVERY .....	29
BLACK GOLD DELIVERY.....	29
MISC .....	29
LIBRARY HOURS.....	29
INTERLIBRARY LOAN CONTACTS.....	29
LIBRARY FAX NUMBERS .....	30
GLOSSARY .....	30

## 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 six members share the Koha 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, each Library Jurisdiction has a customizable homepage through Aspen that allows patrons to view items specific to their home library as well as what is available from other libraries in the Cooperative. The Black Gold office in Arroyo Grande supports the automated system for its users.

### Members of the Black Gold Cooperative Library System:

Blanchard/Santa Paula Public Library ([sp.blackgold.org](http://sp.blackgold.org))

Carpinteria Community Library ([ccl.blackgold.org](http://ccl.blackgold.org))

Goleta Valley Library ([gvl.blackgold.org](http://gvl.blackgold.org))

Lompoc Public Library ([lom.blackgold.org](http://lom.blackgold.org))

Santa Maria Public Library ([sm.blackgold.org](http://sm.blackgold.org))

Paso Robles City Library ([pr.blackgold.org](http://pr.blackgold.org))

## 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 overdues.

### **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. **A mobile number must be entered into the SMS number field in the patron record. Include the carrier as indicated.**

## **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 Koha **two days before the due date** with an email notification going to the patron. Auto-renewals are done at the same time the reminder notices are sent out. Some itypes are not renewable or renewable only by phone request. **The new auto-renewal due date is effective from the original due date (i.e., 23 days if renewed 2 days prior to the original due date).**

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 Koha system.

## ONLINE

2. Access is provided at [www.blackgold.org](http://www.blackgold.org).  
Overdue items may be renewed online following standard renewal rules. Items cannot be renewed until 2 days before the item's due date.

## PATRON INFORMATION

### INPUT STANDARDS PATRON REGISTRATION

1. When a patron applies for a library card, check for a pre-existing patron account using the following methods in this order:
  - a. Search by name using the patron last name, ~~comma and first three letters of the first name~~. Confirm results using date of birth.
  - b. Search using privacy-protected format of driver's license number. Confirm results using date of birth. **Entering the Full driver's license will not retrieve no longer pulls up patron account; must enter the last four digits of the ID. license number with privacy format included (i.e., AXXX1234).** Koha will search for other IDs so long as the format includes the privacy format.
  - c. Search using patron's date of birth.

## BARCODE

New patrons – scan account number from library card.

Existing patrons – If a pre-existing account for a patron is located do not assign a new barcode. See "Replacement Library Cards".

## REPLACEMENT LIBRARY CARDS

No agency charges replacement fees for normal wear and tear or for name changes. Some agencies may charge for a replacement card if the patron has lost or misplaced a card. An ID is required to replace a library card.

If a patron is currently registered at your library and wishes to have the card replaced, assign a new barcode. For Best Practice, the barcode prefix and registered library should match.

If a patron is not currently registered at your library and wishes to have the card replaced, confirm the patron wants to change their registered library. If necessary, update all fields and add new barcode.

1. If the patron wishes to change libraries – assign a new barcode and change the registered library. The barcode prefix and library should match. Online digital accounts may also need to be updated or deleted.

- If the patron does not wish to change libraries – follow best practices at your location to allow checkout and have the patron, follow up at their registered library to obtain a new card.

The patron’s previous barcode should be noted in the Previous Barcode field. This allows staff to verify the previous barcode when troubleshooting e-material issues (Overdrive, Hoopla, etc.).

## SCANNER – PATRON ENTRY

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.

RULE	EXAMPLE
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>Last Name field. Suffix field.</b>	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. Optional ‘Legal name if different’ field available for patrons who use name other than their legal names for patron account.

RULE	EXAMPLE
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

Include Middle Name in 1<sup>st</sup> Name Field

Middle name (initial if full name unavailable). Enter in Initials field of patron registration.

RULE	EXAMPLE
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

## LIBRARY

New patrons – automatically set in patron registration wordform using the library location where the card is being created (barcode prefix matches branch).

Existing patrons – If a patron has moved or wishes to change their registered library the registered library should match the barcode prefix so the card may need to be replaced. See “Replacement Library Cards” to allow checkout.

## PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes. The following are examples only: Adult, Teen, Juvenile, Internet Only.

## ADDRESS

A valid home address is required for all patrons except for “internet only” and “Welcome”. State law requires that patrons receive written notices before being sent to collections. **It is imperative we have a valid address.**

To add an address, use Main Address field (or Alternate Address if adding multiple addresses). If entering a second address, list the mailing or local address in the Main Address section.

Enter zip code, select **city and state**.

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.  Use the following abbreviations:	<b>Address:</b> 15 Main St  <b>Address:</b> 123 W 45 St Apt 67  <b>Address:</b> 89 Grand Ave Ste 10  <b>Address:</b> PO Box 333																							
<table border="0"> <tr><td>Apartment</td><td>Apt</td></tr> <tr><td>Avenue</td><td>Ave</td></tr> <tr><td>Boulevard</td><td>Blvd</td></tr> <tr><td>Building</td><td>Bldg</td></tr> <tr><td>Circle</td><td>Cir</td></tr> <tr><td>Highway</td><td>Hwy</td></tr> <tr><td>Lane</td><td>Ln</td></tr> <tr><td>Place</td><td>Pl</td></tr> <tr><td>Road</td><td>Rd</td></tr> <tr><td>Room</td><td>Rm</td></tr> <tr><td>Street</td><td>St</td></tr> <tr><td>Suite</td><td>Ste</td></tr> </table>		Apartment	Apt	Avenue	Ave	Boulevard	Blvd	Building	Bldg	Circle	Cir	Highway	Hwy	Lane	Ln	Place	Pl	Road	Rd	Room	Rm	Street	St	Suite
Apartment	Apt																							
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  If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)	<b>Address:</b> W Main St Apt 4B  <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. Not required fields in Koha.

RULE	EXAMPLE
Enter the number in the <del>Phone-1</del> <b>Primary phone</b> field. If a second number has been provided, enter it in the <del>Phone-2</del> <b>Secondary phone</b> field.	Telephone #: 805-777-7777

### PHONE FIELD ENTRY GUIDELINES

“~~Voice phone-1~~” “Primary phone” 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).

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 receive a print bill notice after 30 days.

## 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.
- 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.

## PASSWORD

Will default overnight to last four digits of phone number if nothing is entered. If no phone number is entered, default to '1234'.

## PREVIOUS BARCODE

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

## DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If patron refuses to provide the year of birth, enter the birth year as 01-01-1900.

## UNIQUE ID

Enter the last four digits of the ID number, followed by the type of ID in this order:

### Driver's License

1. Enter the last four digits of the number, followed by a space.
2. Enter the abbreviation of the issuing state, followed by **DL** to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

**9760 CDL      1721 WADL**

### State ID

Follow the same entry procedure as Driver's License; use **ID** to denote identification.

**9760 CID**

### Military ID

1. Enter the last four digits of the number, followed by a space, then **MLID**

**0628 MLID**

### Alien Resident Number

1. Enter the last four digits of the number, followed by a space
2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.

**0497 INSID Mexico**

### Passport Number

1. Enter the last four digits of the number, followed by a space.
2. Enter **PPN**, followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g. **USA**).

**9023 PPN USA**

**4568 PPN FRA**

### Border Crossing Card

1. Use the back of the card (no photo)
2. Use the last four digits of the number at the bottom on the first line beginning with MEX

**MEX 6789**

### Matricula Consular

1. Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
2. Enter the country abbreviation followed by a space then **MAT CON**

**1244 MX MAT CON**

### Employment Authorization Document

1. Use the front of the card (photo)
2. Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then **USEA**

**1244 USEA**

## PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., 9760 P/CDL, 9760 P/CID, 0628 P/MLD, etc.

Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

## STAFF INITIALS

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

## STANDARDS FOR PATRON NOTES IN Koha

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	SM <sup>2</sup>	GV	CC
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address see below <sup>1</sup>	See below 1
Group Cards	n/a	n/a	n/a	n/a	parent ID & proof of address see below <sup>1</sup>	n/a
Juvenile	parent ID & proof of address	parent ID	parent ID	parent ID & proof of address	see below <sup>1</sup>	See below 1
Welcome	ID	ID	ID	ID	see below <sup>1</sup>	n/a
Teen	N/A	n/a	parent ID	n/a	Age 13-17 issued w/out ID and w/out proof of address	Ages 13-17 issued w/out ID
Internet Only	N/A		n/a		Age 18 & up issued w/out ID	Ages 18 & up issued w/out ID

<sup>1</sup> GO 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. GO issue cards 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 fewer, holds processing remains the same.
- Hold Pickup Point – Remove at library's discretion.
- PAC – If library is closed fewer 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.~~

In October 2020, the Administrative Council voted that juvenile or teen patrons 'aging up' to adult cards should have existing fines and fees removed from their account.

## **ONLINE REGISTRATION**

Patrons may register online and receive a temporary barcode starting with the library prefix and then an 'E' (example 22138E). Libraries are assigned based on zip code designations through a 3rd party vendor that does address verification. "E" cardholder registration expiration varies by jurisdiction. These 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.

## **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.

Two ~~One~~ exceptions to standard loan practices are Rental Collections (materials which patrons pay to use) and Express 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. 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. 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 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.

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

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

## Claimed & Missing from Holdshelf Contacts

JURISDICTION	BRANCH	CONTACT	EMAIL ADDRESS	PHONE NUMBER
Goleta	GO	Nicole Lvoff	nlvoff@cityofgoleta.org	805.964.7878
Carpinteria	CC	Eric Castro	<a href="mailto:ericc@carpinteriaca.gov">ericc@carpinteriaca.gov</a>	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	Selena Fierro Stacy Brigman	sfierro@cityofsantamaria.org sxbrigman@cityofsantamaria.org	805.925.0994x1508
Santa Paula	SP	Nancy Duenas	nancy.duenas@blanchardlibrary.org	525.3615 x 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, Administrative Council approved increasing the renewal limit to 5 renewals on eligible items.

TYPE	SP	LM <sup>3</sup>	PR	SM	GV	CC
Audio*	5	5	5	5	5	5
Blu-ray/Blu-ray Set	5	5	5	5	5	n/a
Books	5	5	5	5	5	5
Book Club Kit	0	0	0	0	0	0
DVD/DVDSET	5	5	5	5	5	5
Encyclopedia	5	5	5	5	5	5
Hotspots <sup>2</sup>	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	5					3
Periodicals	5	n/a	5	no	5	5
Read Along	5	5	5	5	5	5
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	5	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						
<sup>2</sup> Device suspension for overdue device branch determined. Contact Black Gold to suspend service for device.						
<sup>3</sup> Lompoc 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 <sup>1</sup>. 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
<b>Express</b> (Book, Music, DVD)	n/a	n/a	n/a	n/a	n/a	n/a
Hotspots <sup>2</sup>	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
<b>Rental Book</b>	n/a	7	n/a	n/a	n/a	n/a
<b>Rental DVD</b>	n/a	3-movies/ 7-series	n/a	n/a	n/a	n/a
Special Loan			42			
Tablet	21					
Uncataloged Paperback	no limit	n/a	n/a	21	No limit	No limit
Video Cassette	n/a	n/a	n/a	n/a	n/a	n/a
*Audio includes Book on CD, Book on Tape, Cassette, CD						
<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

## 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 general public without noted approval by a supervisor. ~~Black Gold will periodically run reports listing occurrences of these actions and send to library directors.~~ 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	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	No limit <sup>1</sup>	no limit <sup>1</sup>	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 <sup>2</sup>	n/a	n/a	n/a	n/a	n/a
<sup>1</sup> LM, SP – Encyclopedias that are part of reference do not circulate. <sup>2</sup> 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. \*<sup>6</sup> A service fee may be charged.

TYPE	SP <sup>1,4</sup>	LM <sup>2</sup>	PR <sup>2</sup>	SM <sup>1,2,4</sup>	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 <sup>5</sup>	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 <sup>7</sup>	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$103.00	\$100/unit
Hotspot Cord <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot Charger <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot Case <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot SIM Card <sup>7</sup>	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 <sup>1</sup>
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			

<sup>1</sup> Or list price

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

<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> 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 set	50.00
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

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

TYPE	SP	LM	PR <sup>3</sup>	SM <sup>2</sup>	GV	CC
Adult Books	0	0	0	.25-8.00	0	0
Audios & Books on-Tape-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/DVDSET	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	<del>.50-cost of book</del> 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
Rental Books	0	0	n/a	<del>.25-8.00</del>	0	n/a
Video Game	0	0	n/a	.25-8.00	0	n/a
Videos	0	0	n/a	n/a	0	n/a

<sup>2</sup> SM – Pamphlets and Spanish paperbacks .25-8.00

<sup>3</sup> 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.  **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.  ***1<sup>ST</sup> 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.

### 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 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.	Fax #	Email
PR	Christiansen, Karen	805.237.3871			kchristiansen@prcity.com
GO	Jil Ronkainen	805.964.7878		805.683.3721	jronkainen@cityofgoleta.org
SM	Fierro, Selena Stacy Brigman	<del>805.925.0954</del> 805.925.0994	2514 1508	805.922.2330	<del>sfierro@cityofsantamaria.org</del> sxbrigman@cityofsantamaria.org
LM	Keen, Dominic	805.875.8789		805.736.6440	<u>D_keen@ci.lompoc.ca.us</u>
SP	Duenas, Nancy	805.523.3615	102	805.933.2324	Nancy.duenas@blanchardlibrary.org



CC	Castro, Eric	805.684.4314		ericc@carpinteriaca.gov
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## **HOTSPOT: SUSPEND/ACTIVATE**

On 5/21/21 Admin Council voted to no longer share hotspots amongst jurisdictions (holds to patrons outside the owning jurisdiction are not allowed) effective July 1, 2021.

Black Gold manages Hotspots for circulation to patrons (T-Mobile is the vendor utilized). 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; Black Gold prefers individual requests rather than 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.

## **LIBRARY MANAGED HOTSPOTS**

Occasionally, libraries will purchase Hotspots outside of the contract Black Gold has with T-Mobile. These devices are generally paired with a laptop/Chromebook, used only by staff or for other specific uses. Black Gold staff cannot provide technical assistance for these hotspots. Individual jurisdictions will need to contact the carrier directly for technical support, to temporarily suspend devices, or any other issues that may arise.

These Hotspots owned by the libraries should be labeled in a manner that identifies to Cooperative members the individual jurisdiction's ownership. The SIM card unique ID needs to be noted in the item record as does the device name. The device name should not match the name of devices owned by BG and it should indicate the jurisdiction.

Labeling must:

- Be different than what BG uses
- Not use BG in the identification label
- Use a unique name that cannot be confused with other jurisdictions (ex: not hotspot 1)

For example:

*SMPL001 (Santa Maria Public Library)*

*Libraries are encouraged to keep a spreadsheet of pertinent information to help with hotspot troubleshooting. Example tracking spreadsheet:*

PW - ORIG	IMEI Number	PHONE NUMBER	SIM Number	BG WIFI SSID	BG WIFI PW	STATUS
21445358	868915021445358	805.574.0023	8901260511741985180	Bgc001	llovemylibrary	ACTIVE

If devices other than T-Mobile are purchased ATS does not have any technical support guidelines.

## 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"> <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 is being forwarded to the owning library.</li> <li>Add a note to the patron record with information about the damage and that it was re-checked out on [date]</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</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 is being forwarded to the owning library.</li> </ul>

<p>in an inter-office envelope with a note about the problem.</p> <ul style="list-style-type: none"> <li>The owning library will decide how to proceed once it received the item.</li> </ul>	<ul style="list-style-type: none"> <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>
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## CLAIMS

### CLAIM RETURNED

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

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:	
<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>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>	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.
<b>CC</b>	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.

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
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
<p>*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:</p> <ol style="list-style-type: none"> <li>1. Return the item</li> <li>2. Change the items status to “Missing”</li> <li>3. Put a manual replacement charge on the patron’s account with a note, if that is the local policy.</li> </ol>						

## COLLECTION POLICIES

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

## LIBRARY JURISDICTION CODES

BLACK GOLD COOPERATIVE SYSTEM LIBRARY JURISDICTION CODES					
<b>GV</b>	Goleta Valley		<b>PR</b>	Paso Robles	
<b>L</b>	Lompoc		<b>SP</b>	Santa Paula	
<b>M</b>	Santa Maria		<b>CC</b>	Carpinteria	

## ATS LIBRARY JURISDICTION AND BRANCH CODES

### **C Carpinteria Community Library**

CC Carpinteria Community Library

### **G Goleta Valley Library**

go Goleta Branch  
gl Los Olivos  
gs Solvang  
gu Buellton  
gy Santa Ynez  
gbv Goleta Valley Library Book Van

### **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  
mb Bookmobile

**PR Paso Robles City Library**

prs Library Study Center

pr Paso Robles City Library

**SP Blanchard/Santa Paula Public**

sp Blanchard/Santa Paula Library

**Black Gold Headquarters Codes**

ATS Automation and Technical Services

CU Cataloging Unit

BG Black Gold Office (BGCLS, BGHQ)

**DELIVERY**

**BLACK GOLD DELIVERY**

Currently, Black Gold runs a single round trip delivery schedule, Tuesdays and Fridays, to all the main library member jurisdictions and to Black Gold headquarters. Holiday week scheduling is determined based on library hours and availability of the Central Courier driver. Monthly deliveries that include San Luis County Library and Santa Barbara Public Library are being scheduled and are subject to approval by the Administrative Council Members.

The delivery route starts in Santa Paula with the driver arriving at the Blanchard Library at 6:30 a.m. Delivery schedules fluctuate with traffic conditions and delivery volume. Delivery times are delayed 60-80 minutes on days that include stops at Santa Barbara and San Luis Obispo.

**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**

<b>Jurisdiction</b>	<b>ILL Staff</b>	<b>Phone Number</b>
<b>SP</b>	Nancy Duenas	805.525.3615 x 102
<b>GO</b>	Elizabeth Saucedo	805.964.7878
<b>LM</b>	Dominic Keen	805.875.8789
<b>PR</b>	Karen Christiansen	805.237.3871 x801
<b>SM</b>	Kathy Lambert	805.925.0994
<b>CC</b>	Eric Castro	805.684.4314

## LIBRARY FAX NUMBERS

Jurisdiction	Branch	Fax Number
<b>SP</b>		805.933.2324
<b>SM</b>	Santa Maria (Main) (branches do not have faxes)	<b>805.922.2330</b>
<b>CC</b>	Carpinteria	n/a

## GLOSSARY

A	Adult
ATS	Automation and Technical Services (BG libraries sharing the ILS)
AV	Audio visual material
BG	Black Gold Cooperative Library System
GV	Goleta Valley Library
CC	Carpinteria Community Library
ILS	Integrated Library System
J	Juvenile
LM	Lompoc Public Library
MM	Santa Maria Public Library
OPAC	Online Public Access Catalog
PR	Paso Robles City 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.