

BLACK GOLD COOPERATIVE LIBRARY SYSTEM

# CIRCULATION AND INTERLIBRARY LOAN MANUAL

September 18, 2020

Automation and Technical Services Operations Committee approved on September 2, 2020.

Approved by Black Gold Administrative Council on September 18, 2020.

Updates made after September 2020 in Red

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.

Distribution: Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, Joanne Britton, SM; Sarah Bleyl, LM; Kristina Hernandez, Sandra Vose, Molly Wetta, SB; Justin Formanek, Nancy Duenas, SP; Glynis Fitzgerald, Matt Duhon & Kimberly Hunter, BG; Library Directors: PR, SLO, SM, LM, SB, SP

## Table of Contents

PURPOSE.....	4
INTRODUCTION.....	4
NOTIFICATIONS.....	5
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 .....	6
ONLINE.....	6
PATRON INFORMATION .....	6
INPUT STANDARDS PATRON REGISTRATION.....	6
BARCODE .....	6
SCANNER – PATRON ENTRY.....	6
LAST NAME.....	7
FIRST NAME .....	8
MIDDLE NAME .....	8
TITLE/SUFFIX.....	8
REGISTERED AT .....	8
PATRON CODE.....	9
ADDRESS.....	9
TELEPHONE/EMAIL, ETC. ....	10
PHONE FIELD ENTRY GUIDELINES .....	10
TELEPHONE INPUT STANDARDS FORMAT.....	10
GENDER.....	11
STATISTICAL CLASS.....	11
PASSWORD .....	11
LANGUAGE .....	11
FORMER BARCODE .....	11
BIRTHDATE.....	11
UNIQUE ID .....	11
GUARDIAN.....	12
DATA ENTRY .....	12
STANDARDS FOR PATRON NOTES IN POLARIS .....	12
PATRON REGISTRATION REQUIREMENTS.....	13
BEST PRACTICE FOR LIBRARY CLOSURE.....	13
LIBRARY CARDS .....	13
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 .....	15
HOLDS (ILL) .....	15
UNCLAIMED HOLD ITEMS .....	15
RENEWAL LIMITS.....	16
MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE .....	17
PAPERBACK.....	18
OVERRIDING DUE DATES FOR STAFF/OTHERS .....	18
EXCEPTIONS TO OVERRIDES.....	18
MAXIMUM NUMBER OF EACH MATERIAL TYPE .....	18
MAXIMUM NUMBER OF ITEMS BY PATRON TYPE .....	19
FEES AND FINES.....	19
SPECIFIC AGENCIES' REPLACEMENT COSTS FOR LOST ITEMS.....	19
REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY.....	20
BLACK GOLD OVERDUE FINES .....	21
FINE LIMITS ON SERVICE .....	22
BLACK GOLD FEES AND CHARGES.....	22
CHECK-IN.....	22
UNIFORM CHECK-IN PROCEDURES.....	22
RFID.....	23
IN TRANSIT .....	23
LOST MATERIALS.....	23
REFUNDS FOR LOST AND PAID ITEMS .....	23
WAIVING FEES FOR LOST OR DAMAGED ITEMS .....	24
Lost/Missing Items Contacts .....	24
T-MOBILE HOTSPOT: SUSPEND/ACTIVATE .....	24
BEST PRACTICES FOR DAMAGED/INCOMPLETE ITEMS.....	25
CLAIMS.....	26
CLAIM RETURNED .....	26
NUMBER OF CLAIM RETURNED ALLOWED .....	27
COLLECTION POLICIES.....	28
LOCATION CODES .....	28
LIBRARY JURISDICTION CODES.....	28
ATS LIBRARY JURISDICTION AND BRANCH CODES.....	28
BLACK GOLD HEADQUARTER CODES .....	29
DELIVERY .....	29
BLACK GOLD DELIVERY.....	29
BLACK GOLD DELIVERY SCHEDULE .....	30
LIBRARY BRANCH DELIVERY SCHEDULES .....	30
MISC .....	31
LIBRARY HOURS.....	31
INTERLIBRARY LOAN CONTACTS.....	31

LIBRARY FAX NUMBERS .....	31
GLOSSARY .....	32
STATISTICS .....	32
APPENDIX .....	33
NOTICE TEXT .....	33
TYPICAL NOTICE AND BILLING CYCLE – POLARIS .....	36
COLLECTION CYCLE – POLARIS .....	36

## 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 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.

### **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 patron account using the following methods in this order:
  - a. Search by name using the patron's last name, comma and first three letters of the first name (using \* as a wildcard can help yield results). Confirm results using date of birth.
  - b. Search using driver's license number. Note: If a patron used a passport or other ID to obtain a library card their record will not be found. Confirm results using date of birth.
  - 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. 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.

1. If the patron wishes to change libraries – assign a new barcode and change the registered library. The barcode prefix and library should match.
2. 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 Former Barcode field. This allows staff to verify the previous barcode when troubleshooting e material issues (Overdrive, Hoopla, etc.).

### 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.

<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.

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

Middle name (initial if full name unavailable)

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

## 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

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 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 (also, add "Internet Only" block to account)

## 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																								
<p>Enter street address and apartment number (if applicable), or PO box number.</p> <p>Do not enter any periods.</p> <p>Use the following abbreviations:</p> <table style="width: 100%; border: none;"> <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	Ste	<p><b>Address:</b> 15 Main St</p> <p><b>Address:</b> 123 W 45 St Apt 67</p> <p><b>Address:</b> 89 Grand Ave Ste 10</p> <p><b>Address:</b> PO Box 333</p>
Apartment	Apt																								
Avenue	Ave																								
Boulevard	Blvd																								
Building	Bldg																								
Circle	Cir																								
Highway	Hwy																								
Lane	Ln																								
Place	Pl																								
Road	Rd																								
Room	Rm																								
Street	St																								
Suite	Ste																								
<p>If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW</p> <p>If a street name is a numbered street, use the cardinal number only, (without the "-st", "-nd", "-rd", "-th")</p>	<p><b>Address:</b> W Main St Apt 4B</p> <p><b>Address:</b> 1200 Parks Ave NW</p> <p><b>Address:</b> 13 E 67 St</p>																								

## 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: As of September 5, 2018, if the system web application (LEAP) is used to register a patron, and the patron refuses to provide a phone number, please leave the phone number field blank and insert a ‘non-blocking note’ in the patron record using standard note format indicating the patron refused to provide a phone number.

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.
  
- 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 for statistical purposes.

### **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 01-01-1900.

### **UNIQUE ID**

Enter the number, followed by the type of ID.  
Use these forms of ID in this order:

<b>RULE</b>	<b>EXAMPLE</b>
<b>DRIVER'S LICENSE</b> 1. Enter the number, followed by a space. 2. Enter the abbreviation of the issuing stated, followed by <b>DL</b> to denote Driver's License (with the exception of California which would be entered as <b>CDL</b> ). 3. Do not place a space between the two (i.e., AZDL, not AZ DL).	N6579760 CDL SM541721 WADL
<b>STATE ID</b>	N6579760 CID

Follow the same entry procedure as Driver's License; use <b>ID</b> to denote identification.	
<b>MILITARY ID</b> Enter the number, followed by a space, then <b>MLID</b>	495950628 MLID
<b>ALIEN RESIDENT NUMBER</b> 1. Enter the number, followed by a space 2. Enter <b>INSID</b> (Immigration & Naturalization Identification) and the issuing country.	8030497 INSID Mexico
<b>PASSPORT NUMBER</b> 1. Enter the number followed by a space. 2. Enter <b>PPN</b> followed by a space. 3. Enter the country of origin, or the country's abbreviation (e.g., USA).	8679023 PPN USA 1234568 PPN FRA
<b>BORDER CROSSING CARD</b> 1. Use the back of the card (no photo) 2. At the bottom, on the first line, enter the information beginning with MEX	MEX004214033
<b>Matricula Consular ID</b> 1. Enter the number in the lower right corner on the picture side of the ID located below the expiration date followed by a space 2. Enter country abbreviation followed by a space then <b>MAT CON</b>	0302447 MX MAT CON
<b>Employment Authorization Document</b> 1. Use the front of the card (photo) 2. Under the name is a USCIS number, enter the information beginning with the number followed by USEA.	000-000-702-USEA

## 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	see below <sup>1</sup>
Group Cards	n/a	n/a	n/a	n/a	see below <sup>1</sup>	n/a	see below <sup>1</sup>
Juvenile	parent ID	parent ID	parent ID	parent ID	see below <sup>1</sup>	parent ID & proof of address	see below <sup>1</sup>
Temporary	n/a	n/a	n/a	ID	see below <sup>1</sup>	ID & \$10 deposit, \$20 if no ID	see below <sup>1</sup>
Youth	parent ID & signature	n/a	parent ID	n/a	n/a	n/a	Age 3-17 issued w/out ID

<sup>1</sup> SB and 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. SB and 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 22063E). Libraries are assigned based on zip code designations through a 3rd party vendor that does an 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 exceptions to standard loan practices are Rental Collections (materials which patrons pay to use) and Express 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.

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. 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/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
Goleta	GO	Marie Crusinberry	<a href="mailto:mcrusinberry@cityofgoleta.org">mcrusinberry@cityofgoleta.org</a>	805.964.7878
Lompoc	LM	Dominic Keen	<a href="mailto:D_keen@ci.lompoc.ca.us">D_keen@ci.lompoc.ca.us</a>	805.875.8782
	LV	Sarah Starbuck	<a href="mailto:S_starbuck@ci.lompc.ca.us">S_starbuck@ci.lompc.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 <sup>3</sup>	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
Library of Things	0	0	0	0	0	0	0
Periodicals	5	n/a	5	5	5	no	5
Read Along	5	5	5	5	5	5	5
Reference/ Special Loans	case by case	case by case	no	case by case	case by case	no	Case by case
Laptops	n/a	n/a	n/a	0	1 <sup>1</sup>	no	n/a
Videos	5	n/a	5	n/a	n/a	n/a	n/a
<p>*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along  <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.  <sup>3</sup>Lompoc Bookmobile items have a renewal of 1.</p>							

## 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	7
Laptop	In-house	n/a	n/a	1 week	1 hour	7	2 hours in-house
Library of Things	n/a	n/a	n/a	21	n/a		21
Periodicals	7	n/a	21	21	21	21	21
Reference/Special Loans	0 or 7	case by case	case by case	2	case by case	case by case	Case by case
Rental Book	21	7	n/a	n/a	n/a	n/a	n/a
Rental DVD	n/a	3 movies/ 7 series	n/a	n/a	n/a	n/a	n/a
Uncataloged Paperback	no limit	n/a	n/a	no limit	no limit	21	No limit
Video Cassette	21	n/a	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 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.

<b>TYPE</b>	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SLO</b>	<b>SB</b>	<b>SM</b>	<b>GV</b>
Total # of All Items	30	50	50	99	99	50	99
Audio Cassettes	6	n/a	50	n/a	n/a	n/a	n/a
Blu-ray/Blu-ray Set	10	no limit	50	no limit	no limit	50	99
Books on CD	6	no limit	50	no limit	no limit	50	99
Books on Tape	6	n/a	50	n/a	n/a	n/a	n/a
CDs	6	no limit	50	no limit	no limit	50	99
DVD/DVDSET	10	no limit	50	10	no limit	50	99
Encyclopedia	2	no limit <sup>1</sup>	50	no limit	no limit	50	99
Hotspots	1	1	1	1	1	1	1
Library of Things	1	1	1	1	1	1	3
Pamphlets/Vertical Files	no limit	no limit	50	no limit	no limit	5	99
Periodicals (same title)	6	n/a	50	no limit	no limit	5A 5J	99
Periodicals (total)	6	n/a	50	no limit	no limit	5A 5J	99
Videos	4	n/a	50	n/a	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.)

<b>TYPE</b>	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SLO</b>	<b>SB</b>	<b>SM</b>	<b>GV</b>
Adult	30	50	50	99	99	5	99
Juvenile	4 *	50	50	99	99	5	99
Student			5	99	3		
Temporary	n/a	n/a	5	5	n/a	5	5
Teen	4 *	n/a	50	99	99	5	99

\*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 allow patrons to replace the item themselves. \*6 A service fee may be charged.

<b>TYPE</b>	<b>SP <sup>1, 4</sup></b>	<b>LM <sup>2</sup></b>	<b>PR <sup>2</sup></b>	<b>SLO <sup>2</sup></b>	<b>SB <sup>1, 2, 3, 4</sup></b>	<b>SM <sup>1, 2, 4</sup></b>	<b>GV</b>
Adult Fiction	35.00	30.00	36.00	30.00 <sup>1</sup>	30.00	35.00	30.00

Adult Non-fiction	40.00	30.00	42.00	35.00 <sup>1</sup>	30.00	40.00	30.00
Audio Cassettes	10.00/ cassette	n/a	n/a	n/a	n/a	n/a	10.00/cas sette
Blu-ray <sup>5</sup>	40.00	20.00	n/a	40.00 <sup>1</sup>	20.00	40.00	20.00
Blu-ray Set	50.00	30.00	n/a	50.00 <sup>1</sup>	20.00	50.00	30.00
Book on CD	10.00/disc	10.00/disc	10.00/disc	20.00/disc <sup>1</sup>	50.00	50.00	20.00disc/ 50.00set
Book on Tape	10.00/ cassette	n/a	n/a	n/a	n/a	n/a	10.00/cas sette
Compact Discs (music)	30.00	10.00	20.00	20.00/disc <sup>1</sup>	20.00	30.00	20.00
DVD	30.00	20.00/2 or less discs	20.00	35.00/disc <sup>1</sup>	20.00	30.00	20.00
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	30.00/disc
Hotspot Unit <sup>7</sup>	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$100/unit
Hotspot Cord <sup>7</sup>	10.00	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	10.00
Hotspot Case <sup>7</sup>	10.00	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	10.00
Juvenile Blu-ray	30.00	20.00	n/a	40.00 <sup>1</sup>	30.00	30.00	20.00
Juvenile Fiction	25.00	30.00	28.00	25.00 <sup>1</sup>	30.00	25.00	20.00
Juvenile Non-fiction	25.00	30.00	28.00	25.00 <sup>1</sup>	30.00	25.00	20.00
Laptops	1200.00	n/a	n/a	List price	600.00	List price	n/a
Lease Book Fiction	35.00	n/a	n/a	n/a	n/a	35.00	n/a
Lease Book Non- fiction	40.00	n/a	n/a	n/a	n/a	40.00	n/a
Library of Things	n/a	n/a	n/a	150.00 <sup>1</sup>	n/a	n/a	150.00 <sup>1</sup>
Pamphlets	n/a	n/a	5.00	n/a	n/a	3.00	n/a
Paperbacks Chargeable	10.00	10.00	10.00	22.00/Adult 15.00/Juv	10.00	10.00	n/a
Periodicals	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Read Along/VOX	n/a	n/a	n/a	n/a	30.00	n/a	n/a
Reference	60.00	60.00	60.00	65.00 <sup>1</sup>	60.00	60.00	60.00
Video Cassettes	25.00	n/a	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, 3 months for Lompoc.

<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

LOMPOC	
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	7.00 <sup>1</sup>
Juvenile CD-Book	40.00 <sup>1</sup>
Juvenile trade paperback	7.00 <sup>1</sup>
<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<sup>4</sup></b>	<b>SB<sup>1</sup></b>	<b>SM<sup>2</sup></b>	<b>GV</b>
Adult Books	0	.25-8.00	0	0	0	.25-8.00	0
Audios & Books on Tape	0	.25-8.00	0	0	0	.25-8.00	0
Blu-ray & Blu-ray Set	0	.25-8.00	0	0	0	.25-8.00	0
DVD/DVDSET	0	.25-8.00	0	0	0	.25-8.00	0
Book Club Kits	n/a	.25-8.00	0	0	0	1.00-8.00	0
Express Books	n/a	n/a	0	0	0	n/a	0
ILL – out of system	0	.50-cost of book	0	0	0	.25-8.00	0
Hotspot	.25-8.00	.25-8.00	0	0	0	.25-8.00	0
Juvenile Books	0	.25-8.00	0	0	0	.25-8.00	0
Laptops	8.00-1200.00	n/a	n/a	0	0	.25 - 8.00/hour	0
Library of Things	n/a	n/a	n/a	0.00	0	.25-8.00	0
Paperback Cataloged	0	.25-8.00	0	0	0	.25-8.00	0
Periodicals	0	.25-8.00	0	0	0	.25-8.00	0
Reference/Special Loans	0	.50-8.00	0	0	0	.25-8.00	0
Rental Books	0	1.00-8.00	n/a	0	0	.25-8.00	0
Video Game	0	.25-8.00	n/a	0	0	.25-8.00	0
Videos	0	.25-8.00	n/a	0	0	n/a	0

<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

<sup>4</sup> SLO – fine free as of 2/1/19

### FINE LIMITS ON SERVICE

	SP	LM	PR	SLO	SB	SM	GV
Fine Limits	10.00	10.00	10.00	25.00	25.00	10.00	25.00

### BLACK GOLD FEES AND CHARGES

	SP	LM	PR	SLO	SB	SM	GV
Hold fee *	n/a	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	n/a
Replacing Cards	1.00 1 <sup>ST</sup> replacement cards; 5.00 thereafter	2.00	1.00	n/a	2.00	1.00	2.00
Requests – out of system	5.00	15.00	8.00	n/a	15.00	4.00	15.00
Temporary Cards	n/a	n/a	n/a	no charge	n/a	10.00 deposit 20.00 if no ID	n/a

\*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 CAPRIA (app) and ITIVA (phone renewal) fines charged at renewal.

## 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 through the ILS toolbar 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.

## 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 6 months of payment for the lost item
SLO	Yes, within 3 months of payment for the lost item
GO	No refunds
SM	<b>No refunds</b>
LM	Yes within 3 months of payment for the lost item
SB	No refunds
SP	?

## 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.**

### Lost/Missing Items Contacts

Library	Contact	Phone#	Ext.	Fax #	Email
PR	Christiansen, Karen	805.237.3871		805.238.3665	kchristiansen@prcity.com
SLO	Cunningham, Marci	805.781.5777		805.781.1166	<a href="mailto:mcunningham@slolibrary.org">mcunningham@slolibrary.org</a>
GO	Acton, Michele	805.964.7878		805.683.3721	macton@cityofgoleta.org
SM	Fierro, Selena	805.925.0951	2514	805.922.2330	<a href="mailto:sfierro@cityofsantamaria.org">sfierro@cityofsantamaria.org</a>
LM	Keen, Dominic	805.875.8782		805.736.6440	<a href="mailto:D_keen@ci.lompoc.ca.us">D_keen@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	Justin.formanek@blanchardlibrary.org

### **T-MOBILE 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	Ilovelylibrary	ACTIVE

BG has made the technical assistance 'tips' that our staff use to troubleshoot T-Mobile devices available on the ATS website.

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:

<b>IF ITEM IS NOT CHECKED IN:</b>	
<b>IF PATRON IS PRESENT:</b>	<b>IF PATRON IS NOT PRESENT:</b>
<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>
<b>IF ITEM IS CHECKED IN:</b>	
<b>IF PATRON IS PRESENT:</b>	<b>IF PATRON IS NOT PRESENT:</b>
<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 is 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>	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.

## 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	Case by case	5	3	2	3
C/R to lost	manually set @ 60 days *	leave in C/R status	Case by case	leave in C/R status	leave in C/R status	manually set @ 42 days *	Leave in C/R status

\*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”
3. 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  
 bm Montecito Branch  
 bov **Santa Barbara Outreach Van**

##### **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**

**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
- pr Paso Robles City Library

**SP Blanchard/Santa Paula Public**

- sp Blanchard/Santa Paula Library

<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>			
NORTH ROUTE		SOUTH ROUTE	
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	<b>Village</b>	<b>Arroyo Grande</b>	Monday-Friday
		<b>Atascadero</b>	Monday-Friday
<b>SANTA BARBARA</b>		<b>Bookmobile</b>	out of service
Monday, Wednesday, Friday	<b>Carpinteria</b>	<b>Cambria</b>	Monday-Friday
Monday, Wednesday, Friday	<b>Eastside</b>	<b>Cayucos</b>	Tuesday, Thursday
Monday, Wednesday, Friday	<b>Montecito</b>	<b>Creston</b>	Thursday
		<b>Los Osos</b>	Monday-Friday
		<b>Morro Bay</b>	Monday-Friday
		<b>Nipomo</b>	Monday-Friday
		<b>Oceano</b>	Tuesday, Thursday
		<b>San Miguel</b>	Thursday
<b>SANTA MARIA</b>		<b>Santa Margarita</b>	Monday, Wednesday
Every other Monday	<b>Cuyama</b>	<b>Shandon</b>	Thursday

Every Monday	<b>Guadalupe</b>	<b>Shell Beach</b>	Tuesday, Thursday
Every Thursday	<b>Los Alamos</b>		
Monday, Thursday	<b>Orcutt</b>		
<b>GOLETA VALLEY</b>			
Monday, Wednesday, Friday	<b>Buellton</b>		
Saturday	<b>Los Olivos</b>		
Saturday	<b>Santa Ynez</b>		
Monday, Wednesday, Friday	<b>Solvang</b>		
<b>SINGLE BUILDING JURISDICTIONS</b>			
<b>BLANCHARD/SANTA PAULA</b>		<b>PASO ROBLES</b>	

## 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
<b>SP</b>	Nancy Duenas	805.525.3615 x 101
<b>GO</b>	Brent Field	805.964.7878
<b>LM</b>	Dominic Keen	805.875.8782
<b>PR</b>	Karen Christiansen	805.237.3871 x801
<b>SLO</b>	Marci Cunningham	805.781.5777
<b>SB</b>	Sandra Vose	805.564.5647
<b>SM</b>	Kathy Lambert	805.925.0994

### LIBRARY FAX NUMBERS

Jurisdiction	Branch	Fax Number
<b>SP</b>		805.933.2324
<b>GV</b>	Goleta Valley Library	805.683.3721
<b>LM</b>	Lompoc (Main)	805.736.6440
	Village	805.733.3323 (phone first, shares with voice)
<b>PR</b>		<del>238-3665</del>
<b>SLO</b>	San Luis Obispo (Main)	805.781.1166
	Arroyo Grande	805.473.7173
	Atascadero	805.461.6045
	Cambria	805.927.3524

	Cayucos	805.995.0573
	Creston	805.237.3021
	Los Osos	805.528.7835
	Morro Bay	805.772.6396
	Nipomo	805.929.5476
	Oceano	805.474.7479
	San Miguel	805.467.3224
	Santa Margarita	805.438.4879
	Shandon	805.237.3022
	Shell Beach	805.773.2891
	Simmler	805.475.2759
<b>SB</b>	All branches	805.564.5626
<b>SM</b>	Santa Maria (Main) (branches do not have faxes)	805.928.7432

<b>GLOSSARY</b>	
A	Adult
ATS	Automation and Technical Services (BG libraries sharing the ILS)
AV	Audio visual material
BA	Santa Barbara Public Library
BG	Black Gold Cooperative Library System
GV	Goleta Valley Library
ILS	Integrated Library System
J	Juvenile
LM	Lompoc Public Library
MM	Santa Maria Public Library
OO	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 by Unique)</b>	<b>BILL BODY</b>	
	<b>Custom</b>	The goal of the library is to recover the library materials listed above. If items are not returned promptly, non-payment of this bill will cause your account to be referred to a collection agency. While you will not be reported to any credit bureaus, the library utilizes a collection agency to assist us with materials recovery. Should you be referred to the agency, an additional fee may be added to your account.
	<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 by Unique)</b>	<b>FINE HEADER</b>	
	<b>Default</b>	FINE NOTICE
	<b>FINE BODY</b>	
	<b>Custom</b>	<p>This notice is to inform you that our records indicate your account has accrued fines/fees due to past due materials. If this situation is not addressed promptly, your account may be referred to a collection agency.</p> <p>The library's goal is to have our materials returned for use by our community. While you will not be reported to the credit bureaus, we do utilize a collection agency to assist us with materials recovery. Should you be referred to the agency, an additional fee may be added to your account.</p>

	<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>	HOLD HEADER	
	<b>Default</b>	Requested items are ready for you
	HOLD BODY	
	<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) has 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 cont.</b>		
<b>Hold mail (only if phone not answered)</b>	HOLD HEADER	
	<b>Default</b>	Requested items are ready for you
	HOLD BODY	
	<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>	HOLD BODY	
	<b>Default</b>	You may pick up [TITLE] at [BRANCH] until [DATE].
<b>Overdue email</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	
	<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 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>	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
<b>Overdue mail (only if phone not answered) cont.</b>	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.
	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>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
	<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 AND BILLING 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.”
17 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.”
30 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.
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!

## COLLECTION CYCLE – POLARIS

The patron account goes to Unique when \$40 in fines/fees have accumulated and the fines/fees have ‘aged’ 30 days (see Fine aging). Submission to collections is based on the item’s owning branch.

- Fine aging example: If the min balance is \$25 and the patron had \$20 in existing charges on the account and \$5 additional charges were added 30 days ago then that account would now be eligible to be sent to collections. If the same patron made a \$1 payment on the account toward either of the charges on day 29 of the \$5 charge then the account would not be eligible to go to collection on day 30 since they are only at \$24, even though all the existing charges are old enough. The patron would then need an additional \$1 or more added to the account for at least 30 days before the account is sent.

Unique Submission	\$40 in fines/fees aged 30 days on patron account. \$10 collection agency fees will be 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.

SUPPLEMENTAL NOTICE PROCESSING EXPLANATION

