

## Comments to the questions

**1) All automated libraries have agreed to follow the JAB policy created years ago. There seems to be confusion with the word POLICY. The committees would like to ask this question: Should the policy be divided into two sections titled as follows:**

**Agreed Upon Circulation Standards**

**Agreed Upon Cataloging/Barcoding Standards**

Comments:

Why not leave out "agreed upon" it sounds awkward; "minimum xxxxx standards" ?

Wording is not the problem, if the policies are clear.

The policy should be logically laid out in a single computer file with appropriate section headings

**2) Mandatory training for all staff – The committees felt that this was important for setting standards and cutting down on errors that are occurring. An addition to the JAB Policy; "Mandatory training for all library staff using the SIRSI System will be conducted by NCLS staff or library staff certified as SIRSI trainers by NCLS prior to using the circulation system."**

COMMENTS:

Only if training can be done at the individual libraries.

would be costly- can it be combined with new Sirsi training in the spring? A suggestion- training for non-automated libraries in using IBISTRO

"prior" is not always feasible to MTN, maybe other small libraries too. I'd feel more comfortable agreeing with wording along the lines of, "as soon as possible."

Having member library staff trainers makes sense when they are training, for example, teens who may be only temp employees.

THERE ARE TIMES WHEN PART TIME PEOPLE CAN'T MAKE THE TIMES SET BY THE SYSTEM AND THEY SHOULD BE ABLE TO BE TRAINED BY MAIN LIBRARY STAFF

**3) To assist with standardizing cataloging practices, the committee would like to meet with libraries in the four counties. The meeting would be conducted in each county to review, demonstrate and share cataloging/barcoding procedures with library staff. Would your library staff attend?**

COMMENTS:

Every effort would be made to send someone; difficult to do with a staff of only 2.

Definitely!

We would like to, but most of our staff have other jobs and would need to attend evening training sessions.

staff involved in cataloging would attend

MANY TIMES YOU CAN'T GET TO CLASSES OFFERED AT ONE TIME ONLY

**4) To assist with standardizing circulation practices, the committee would like to meet with libraries in the four counties. The meeting would be conducted in each county to review, demonstrate and share circulation procedures with library staff. Would your library staff attend?**

COMMENTS:

Some would attend.

Every effort would be made to send someone; difficult to do with a staff of only 2.

Can't wait!

We would like to, but most of our staff have other jobs and would need to attend evening training sessions.

If it were at our library

**5) Some titles are produced in many formats, regular print, large print, audio, video, etc.. Then within some formats are hardcover or paperback. A perfect example would be "Gone with the wind". There are multiple records in the database that leave staff and patrons confused. We would like to create Bibliographic records that combine similar formats in order to cut down on the number of Bibliographic records for titles. Recommendation: Adult fiction material will have a bibliographic record that covers all the paperbacks for that particular title and another record for the hardcover. LP paperbacks and LP hardcover will also be separated. A notation after the ISBN # in parenthesis will have the publisher's name. Example: 9780123456789 (Jove : pbk.) We have cleaned up the records associated with "Pagan Stone by Nora Roberts" for you to see the change in the database. Do you agree or disagree with the recommendation**

COMMENTS:

This would be particularly helpful with the uncataloged paperbacks; help patrons who are looking through the online catalog that don't know of the "uncataloged paperbacks" and they might be using ILL for nothing...

This is so important. I can't imagine how confusing this must be to the patron trying to place a hold or find a title when confronted with pages of items in the catalog for one title!

different types definitely need to be separate- ie pbk, hardcover, LP, since patrons have definite preferences

Large Print do not need to be separated in our opinion Paperback and hardcover fiction separation is a good idea

**6) Are there item types that can be added or removed? Below is a list of possible changes. Any Item Types you would like added to the existing list, please specify and also state the quantity of these items in your collection. Add for second half of 2010: A-AUD A-DVD A-MUSIC A-VHS J-AUDIO J-DVD J-MUSIC J-VHS Remove after second half of 2011: A-CASSBK A-CDBK A-DVD-FIC A-DVD-NF A-MUS-CASS A-MUS-CD A-VID-FIC A-VID-NF J-CASSBK J-CDBK J-DVD-FIC J-DVD-NF J-MUS-CASS J-MUS-CD J-VID-FIC J-VID-NF**

COMMENTS:

I would like to see added: YA MAGAZINE A-LP NEW YA-LP NEW J-LP NEW Removed: LP-NEW

A-Aud, not sure how that would work with cassettes and cds. We still have a large collection of the cassettes.

Less to choose from would be nice but AUD should be that or AUDIO. Should only be one way.

Wouldn't it make more sense to have A-AUDIOBK instead of A-AUD[IO], distinguishing it further from Music Category? Is it possible for report purposes, like tracking circ and weeding to have categories for YA (Magazine and Audiobook)? Also, it would be nice to have a A and J New Music category.

A-CDBK=278 A-CASSBK=407 A-DVD-FIC=259 A-DVD-NC=17 A-MUS-CASS=2 A-MUS-CD=431 J-CASS-BK=11 J-CD-BK=14 J-DVD-FIC=112 J-MUS-CD=21 A-VID-FIC=209 A-VID-NF=41 J-VID-FIC=167 J-VID-NF=21

keep: A DVD FIC A DVD NF A VID FIC A VID NF J DVD FIC J DVD NG J VID FIC J VID NF

I hope holds etc. will still display enough info that we won't have to go to the bibliographic record to find out what to look for.

Much easier to search and run reports with the different formats included in item types You can never get back specificity once you remove it

NO to A-AUD and J Audio. Not specific enough. I want to keep the cass and cdbk item types for both A and J. I also want to add VG for Video Game.

Patrons and staff need to know if an audio is a cassette or CD. Where would this information be if it is removed as an item type?

something for LP new non fiction

CONCERNED THAT CASSBK SHOULD BE NOT TAKEN AWAY UNTIL WE KNOW THAT NO ONE HAS OR CIRCULATES ANY THAT THEY CURRENTLY HAVE

**7) Standardizing the Call Number field – The call number serves multiple purposes; to locate the item in the building, where it falls in a report, & grouping for holds. Below are examples where call numbers can cause confusion for the patrons. Please search each of these titles in iBistro. 30 years of National Geographic [DVD] - Search for the record, click on Details - which is the call number 422 or 508? Slumdog millionaire [DVD] - Search for the record, click on Details. Look at the call numbers that are assigned to the items. Would a patron look for the item under call number 503 or 936? Now place a hold. The discription "Oscar Winner 2008" is displayed as if it is a special volume or edition, thus making the patron choose, rather than giving him the first available copy. If both are selected, the patron will receive 2 copies. Fruits basket (the book)- Search for the record, click on Details. All the libraries did not follow the approved standards for "open entries & multi volume sets." Now place a hold. Potsdam and Heuvelton are listed together on V 1, while all other libraries are listed separately because the format used in adding the volumes was done differently by each library. If a patron places a hold for V 1, only the POT or HEU copy will be considered to fill the hold. If the patron selects all the Volume "1"s, he will receive multiple copies of the same book. All libraries must catalog using same format for correct grouping to take place. Please now look at our "examples of Call numbers and item types" posted on our website under Member libraries - Library Automation. Click on sheet two (Other examples) to view Multi-Volume Sets and open entries. Can we create a standard call number list, or agree to use this one, for all staff to follow? Please give us your thoughts.**

COMMENTS:

I agree with the pre-existing call number list.

unsure, but I guess it would work if you could get all libraries to comply.

I think it would be tough to get 65 libraries to agree on the same call number list. I think it would make things easier though.

As long as libraries can be allowed to put items where they think they will work best for their library, then the way the call number is entered should be standard, no matter where it ends up in the collection. We have to concentrate on making it easy for the patron. When staff is having problems placing the holds on multi-volume items, then what we are doing is not working and has to be addressed. It all goes back to mandatory training!!!

This may be difficult to do but a good idea.

How many libraries are currently following the call number example sheet that NCLS produced already? Weren't libraries asked to follow this previously?

Good idea. Will make it easier to identify items and locate them.

YES it would be MUCH EASIER for staff and patrons to order if each volume had its own call number, for ex, Fruits Basket and Little House on the Prarie tv shows/seasons

Yes-it would make this much simpler if everyone followed the same method.

yes, it woul make things easier for everyone

create a standard callnumber list

The added description for Slumdog should be accomplished through location or notes, not through the call number. We saw no confusion as to the various call numbers since libraries have it in DVD, Video, etc. If they are consistent in their call numbers internally, finding items on their shelf should be possible. The volumes issue is a concern and needs to be dealt with by a standard. The one posted looks fine. Another issue: when a patron searches the catalog they are only shown that we own V 2...75 copies of it (YA - GRAPHIC NOVEL V 2 at top of search result). Now that is confusing!

Just create a standard call number list and EVERYONE use it.

I'm for it.

The list on the web site looks OK. I think we should consider adding J to the Juvenile Audio, Video, & magazines, as is done with the books to have some conformity. We have to remember that we have volunteers and patrons of all ages. We need to be consistent so items will be easily found. If we are going to do this, we need to make a decision and stick with it. When we barcoded, we were been instructed to use FICTION, than we found we had to do FICTION BELL to run reports in alphabetical order, and now we will have to change again to FIC BELL. I think you have to understand that this process will take our library quite a while to accomplish as we are very busy.

Agree to use one posted on NCLS website

WHAT ABOUT ALL THE NON AUTOMATED LIBRARIES THAT WE STILL BORROW FROM? ARE THEY GOING TO USE THE SAME LIST?

mostly with reference materials

To identify accelerated readers (AR) is placed after regular call number. To identify series with multiple authors the name of the series follows the regular call number.

we label some here as graphic novel, NEW (for YA) , series name or holiday. this helps us to easily identify for shelving

We enter the volume number in this field.

### **8) Have you considered using the dewey numbers to classify the non-fiction audios & videos?**

COMMENTS:

currently using the local dewey call number when cataloging nonfiction types

We do that.

We do not have more than half a dozen non-fiction dvds at this time.

Using with audio, not doing with videos.

we do

We don't have alot of these to have given it much thought.

they are shelved seperately

We have so few non-fiction items at this time that we simply shelve them separately. Audios are shelved by author so finding them is no problem.

Audios are alphabetically by author's last name. Videos/DVDs are alphabetically by title

I haven't yet added a nonfiction DVD

we have very few non fiction audios and videos to do this with

Already do this.

We have very few. I know not a good answer!

THEY ARE FILED ON SHELF BY TITLE IN THE RATING CODE

**9) In an item record there is a field called "Number of Pieces". The field reflects the number of physical items. Example: 6 CDs for the audio book. When a number other than 1 is in the field an override is requested. This is a reminder to staff to stop & check the physical items before checking out or discharging the material. Should all libraries be required to fill in the "number of pieces" field?**

COMMENTS:

It is nice to have but if a library doesn't use the field it is there extra work to find missing pieces.

If it is not part of your daily routine, when checking in multi-volume items, then we all suffer. We get audio books back with missing CDs, etc. If this would help people stop and do that extra step, then everyone ought to take advantage of what the system can remind us to do.

This is a service not an obligation.

Doing this has substantially solved our problem of shelving without an item and finding out too late that there's one missing. There was the guy who sold his car with a disc in the player.

we have many volunteers here and it gets very confusing when the checkout line is long and the volunteer cant remember an additional password

It will save having to discard perfectly good items just because patrons forget to get the last CD out of their players!

It reminds us to count. Keeps the collection in better shape, and records are consistent.

WOULD HELP IF ALL DID IT BUT I KNOW THAT AT FIRST WE DIDN'T AND CAN SEE WHERE THIS MAKES A DIFFERENCE. NOW DO WE GO BACK AND HAVE TO CHECK ALL RECORDS?

**10) The SIRSI System has an element called Hold Map. This allows Item Types to have specified permission and/or priority when dealing with holds. Below is a list containing the libraries' Item Types they don't ILL according to the SIRSI System. The committee would like to know what are the reasons for not loaning certain materials? BLR - A-DVD-FIC, J-DVD-FIC, A-CD-BK, J-CD-BK, A-PBK CAN - RENTAL(Lucky Day Books) CAV - A-Magazine, J-Magazines, A-MISC & J-MISC CLA - A-CDBK, A-CASBK, J-CDBK, J-CASBK, J-MUS-CD, A-MUS-CD, SOFTWARE, AV-EQUIP LOW - A-VID-NONFIC, A-VID-FIC, J-VID-NONFIC, J-VID-FIC, A-DVD-NONFIC, A-DVD-FIC, J-DVD-NONFIC, J-DVD-FIC OGD - A-MAGAZINE, J-MAGAZINE OSW - A-MAGAZINE, J-MAGAZINE POT - A-DVD-FIC, A-DVD-NF, J-DVD-FIC, J-DVD-NF, A-CDBK, J-CDBK, NEW-BOOK WAT - AV (New music CDs)**

COMMENTS:

PHI loans any and all materials as long as they are not NEW to the shelves.

we do not require any special permissions

we loan everything except reference

We loan everything except reference - but under special circumstances, we do.

We buy a lot of popular music CDs that we want to let our patrons get first crack at before they leave the building for other libraries (which due to different checkout times can be nearly 5 or 6 weeks before we see that CD again. New CDs are only new for a six month period, then we open it up for patrons at other libraries. (WAT) Concern: Whose checkout system would apply? If we only allow 2 weeks for new fiction, how long would title be not available for browsing in our library if other libraries allow longer checkout times and longer and more times to renew? This is an argument for more standardized circulation rules. Question: Would non-automated libraries benefit? Can they place holds in ICICILL for the new items? Concern: Different standards of "new".

we are not on this list

because of difficulties we have had with dvds going out and not being returned our policy requires a \$5 deposit on any dvd - we do not allow dvds to go out via ILL

Better control and location of items. Could consider making some changes.

don't know

PLY doesn't circulate certain local history books that are out of publication and irreplaceable.

age of item, damage and replacement cost

Most items are eligible for borrowing. New items after 3 months.

No idea

I didn't know that option existed, but I personally would like to use it with the Wizardology, Dragonology-type books.

We don't lend lucky day books because they are available on a first come first serve basis within the library, the whole point of the collection - my decision! Anybody can check them out but only from here.

n/a - we loan everything. That's what it is here for.

We loan all materials except those listed as NEW

OURS IS DAMAGE IN SHIPPING, TIME AWAY FROM THE LIBRARY AND NOT KNOWING WHERE THEY HAVE BEEN IF THERE IS DAMAGE. THESE WERE THE REASONS WE DID'T DO IT BEFORE AUTOMATION TOO.

**11) What is your library's procedure for damages to another library's materials? Do you assess a cost, notify the patron, notify the owning library, etc.. How do you resolve it with the owning library?**

COMMENTS:

I would consider adding a policy to our library for this...accidents happen; borrower should do everything in its power to repair the book to good circulating condition or as it was received; if they do not have the proper tools or equipment to repair for the book perhaps the owning library may and as long as the book is still in good circulating condition either before or after repairs then I believe no fines or fees should be assessed.

notify owning library, then charge patron.

charge the patron and charge the library

I call the owning library and see what they would like us to do.

We contact the owning lib and they set the cost, we let the patron know and then send it to the owning lib.

I can tell you that we do not send a damaged item back to the owning library without a note or anything, which has happened to us! We contact the library, explain that there item has been damaged, ask if there an additional charge on top of what is in the record, or if there is no price, ask about that. We contact the patron and do our upmost to collect for the damaged item.

we contact the library and the patron

if a patron damages another library's materials we would contact the library in question for instructions and then inform the patron

We charge the patron for all damages and then pay the owning library. If we receive it in a damaged state we will notify the owning library when we return it.

notify owning library to ask what their policy is, then contact the patron with what they need to do to replace item

We notify the owning library to ask what they want done about the book, then we notify our patron of the action the owning library wants carried out.

ask what they would like us to do first and then how they want it done: money or item replaced

We contact the owning library to assess a cost and bill the patron. We keep the book for patron show and tell until the issue is resolved. We currently send the fee along when we collect it. It might be better if we simply paid the library and collect and retain the fee. But I would want to pay the other library replacement costs- not retail- or replace the book and add processing. This varies from library to library. We prorate value to some degree based on the age and whether we would actually replace the book. That would translate to \$5 PB "patron training and nuisance charge" and \$10 HC. If we're going to replace it- it's cost plus a couple of dollars for processing and shipping where applicable.

We contact the patron. If they do not pay, the library does.

Notify the owning library and then inform our patron of the charge.

Contact owning library. Send payment thru the bins.

We collect from the patron when possible, if not we pay for the item ourselves.

BEFORE AUTOMATION, WE CONTACTED LOANING LIBRARY AND ASKED IF THEY WANTED IT REPLACED OR MONEY FOR ITEM. TRY TO GET IT FROM PATRON BUT HAVE PAID IN THE PAST FROM THE LIBRARY.

**12) Standardizing limits – Can we come up with a standard for any of the configurations on the system? In an effort to become more consistent between libraries, the following recommendations were made: Number of holds allowed per patron would be 10.**

COMMENTS:

sometimes patrons don't always get all of their holds quickly, but don't want them taken off

Home school patrons (parents) often need more because they are getting what they are using now and ordering what they will be using the next lesson. I know there is an override but that means they can't order at home and I now have to spend 1/2 hour or more finding right editions to many books.

The exception being "New" patrons, if their hold limit is different.

patrons should be able to place as many holds as books they are permitted to check out.

10 holds is too time intensive for ILL staff and takes up too much room on the ILL cart. There is also the option to override the limit for homeschoolers and tutors. I would be willing to go to 7, but I still think 5 is sufficient for the majority of our patrons.

PEOPLE DOING COLLEGE COURSES SOMETIMES DON'T KNOW IF THIS IS WHAT THEY WANT FOR A PAPER OR NOT AND DON'T HAVE TIME ALWAYS TO REORDER MORE IF WHAT CAME WASN'T WHAT THEY COULD USE

**13) Standardizing the Card expiration time to be 3 years**

COMMENTS:

Don't Care. Tell me what it is and I go with it!

Expiration times need to be shortened as a standard. People are more mobile and often change their phone and email addresses.

we like 5 years

I like the "never" option. doesn't the system delete patrons that haven't used their card in X amount of time?

We prefer 5 years.

I think five years would be better

MORE WORK WHEN PATRONS ARE USING RIGHT ALONG AND THEN HAVE TO DO OVER

**14) Create "NEW" patron profile . This will aid the libraries in the problem of new patrons never returning the items. It will eliminate large losses of materials from the "one visit patron". Watertown Library is using this with good success. The patron would have this profile for a 3 month period. Maximum number of items allowed would be 3 Maximum number of holds placed would be 3 Maximum overdues before Blocked would be 1 Maximum fines would be \$5.00 Do you think this would be a good idea?**

COMMENTS:

how does the patron record change from New; is this automatically done after the initial period?

if we could be automatically notified when they can be changed to regular status. How would we make that change?

YES YES and definitely YES. We all like this one!

It will penalize the large majority of new patrons, many of whom are working on school assignments, by not allowing them to check out the items they NEED. Not to mention avid readers being severely inconvenienced.

It's hard to set a maximum fine when many libraries have different overdue fines.

I UNDERSTAND THE REASON BUT AGAIN THE COLLEGE STUDENT OR HIGH SCHOOL STUDENT AND PAPERS. CAN SEE WHERE I WOULD BE USING THE OVERRIDE.

**15) A definition of a Barred Patron needs to be established. The recommended definition would be: "Extreme or illegal behavior that goes against library policy".**

COMMENTS:

Agree, agree, agree!!

Please give examples of extreme behavior and would a patron be barred from all libraries?

Define extreme.

Patron would be barred from that particular library, not all libraries?

POLICIES ARE DIFFERENT AND WHAT IS EXTREME IN ONE ISN'T ALWAYS IN OTHERS

**16) Is your library staff using the BARRED status for something other than the previous recommendation? (You may want to run a report on your library patrons that have a BARRED status.)**

COMMENTS:

We were using it to stop patrons if they had any other issue, but we are trying to get that cleared up and out of the record.

I am not sure if every person sitting at the front desk uses the same procedure but they all should be handling it in the same manner.

We've yet to bar anyone. Blocking solves most of our patron problems.

**17) What is your procedure for handling Expired Users records from another library? Do you update any patron information, notify the library of changes or that you have extended the privileged date?**

COMMENTS:

I update the patrons profile in the system, and make a general note of the date the information was updated.

we update all information and notify the other library

yes

We usually update the information unless there is a charge or alert.

If the patron has moved to my lib. i change, update and notify.

Update the patron information, renew the expiration date to three years or whatever the system automatically does. Have not been notifying library of changes. This is all done if the patron's address has not changed to our service area.

no

notify the library in question

We update the information and extend privileges unless there is a problem on the record.

if patron is in the library, we update info, and extend privileges. We do not notify the patron's home library. We consider this a courtesy and have no problem if another library does this for our patrons providing there are no outstanding fines, books not returned, etc

We update patron info and try to remember to notify the other library.

we will update if the patron has no notes or if they are in good standing at their library

We would update info. We've not regularly contacted the other library.

Expired users are requested to return to the library where they applied for a card. We update records when a patron gives us new information.

We update their information and then extend the privileged date.

I only update the information. I cannot imagine any library staff having the time to view/use the information, but if they did I imagine they could generate a monthly report.

We just start over with a new record here

We update address information and notify the patron's library via email. We extend the privilege only if we know the library's user privilege date.

Update information and extend date.

We update patron information but do not notify another library unless we give the patron a new bar-code # from our library

UPDATE PATRON INFO. & IF THEY ARE NOW IN OUR AREA WITH THEIR CONSENT REDO AS OURS