



# NORTH COUNTRY LIBRARY SYSTEM

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Director: Stephen B. Bolton

## STEPS TO AUTOMATING YOUR LIBRARY'S CIRCULATION

### 1. Preliminary Steps and Discussion

Your NCLS Consultant will explain the benefits of automated circulation, along with the library's obligations. You will be given a copy of the agreement that must be voted upon and signed by your Board President, once other steps in the process have been completed. Your Consultant will discuss the following:

#### a. Timeline

The timeline of the project is, in general, set by your library completing the steps in this process. There may be other factors at NCLS that also enter into determining the timeline, such as the availability of personnel in our Technical Services Department, and the number of libraries currently barcoding their collections.

#### b. Demonstration

The library staff and the Board may want a demonstration of the circulation system. A visit to a nearby library that is using the circulation system may also be useful. Your Consultant can help arrange both of these events.

#### c. Costs

The fees for the circulation system are outlined in the agreement. Your Consultant will discuss these and will offer assistance in raising the library's level of support by approaching your municipalities or using a referendum on a municipal or school ballot. Many libraries have used the "automation issue" to raise their general level of support.

#### d. Staff

Many of the NCLS member libraries are essentially one-person operations. Your library may have paid part-time staff or volunteers or both. To ensure the operation of library business is not interrupted, the part-time staff and volunteers who run the circulation desk must be trained in the use of the circulation system. Just as libraries have used automation to increase their monetary support, libraries have also used the issue to solidify or improve their staffing situation. The library must have, whether paid or volunteers, regularly scheduled people who are able to use the circulation system.

#### e. Circulation Policy

Your Consultant will discuss revising the library's circulation policy. This may be necessary because each library's policy is entered into the circulation system, which has more detailed options than the policies of most libraries. Many libraries may not have provisions for renewals, grace periods, etc. in their circulation policies. The choice about each policy item is the decision of each Board. Your

Consultant will provide a circulation policy template that has all of the needed options. Some Boards will decide to act quickly to update their policy, others may decide that a period of discussion and deliberation is required.

f. Patron Registration

One of the advantages of a shared circulation system is the patron database. Having a shared patron database allows people to easily use more than one library by using the same library card. Each library on the circulation system has access to the same patron information. So, if a person has twenty books overdue at a neighboring library and comes to your library to borrow more, you will have the information and can make a decision about whether to lend to that person. Patron registration is usually part of the circulation policy, but is mentioned here separately because of the emphasis the NCLS member libraries have placed on collecting accurate patron information. The libraries have voted to require two forms of identification, one being a picture ID, when registering a patron.

g. Collection Review

During the barcoding process, each item in the library will be touched. Therefore, this project provides a good opportunity to look at the library's collection. Your Consultant will discuss weeding, the possible consolidation of disparate sections, etc. with the library's Director.

h. Shelf List Project

NCLS can provide a list of all of your library's holdings as they appear in the union catalog ([www.northcountrylibraries.org](http://www.northcountrylibraries.org)). Libraries can use this list to compare their current holdings and make note of necessary additions and deletions. NCLS then updates the catalog. Completing a shelf list project can make the process of barcoding a collection much easier and faster. All NCLS member libraries have completed a shelf list at some time in the past. Your Consultant will tell you when your library last completed such a project and will, at the very least, ask you to do a "test pass" on your collection to determine the need for a shelf list project. A shelf list project can take from one month to over a year, depending on the amount of staff and volunteer time that is available.

2. Computer Skills

Someone from the NCLS Technical Services Department will visit the library to gauge the computer skills of the staff and volunteers, and determine if preliminary training is required.

3. Network and Equipment Review

Someone from the NCLS Information Technology Department will, if necessary, visit the library to review the present equipment, equipment placement, and Internet capacity.

4. Review

The Consultant discusses the circulation system agreement with the Director and the Board, and confirms that all of the necessary steps above have been completed.

5. The Signed Agreement

Two copies of the agreement are signed by the Board President and Steve Bolton. The following sequence then takes place:

- a. The NCLS Business Manager submits an invoice to the library. NCLS must receive the start-up fee before ordering equipment and labels.
- b. The NCLS IT Department orders the necessary equipment.
- c. The Technical Services Dept orders the barcode labels.  
(Equipment and barcode labels will take six weeks to arrive.)
- d. The NCLS Technical Services Manager enters the policy information into the circulation system.
- e. The NCLS Technical Services Manager assigns a person to help the library through the barcoding process and training is scheduled.
- f. The equipment is delivered and installed.
- g. Training commences and the barcoding/patron input process begins.

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