Getting Started with Zip Books

Welcome to the Zip Books program! The following list highlights the major steps involved in designing and launching your Zip Books program. If at any time you have questions, please contact Mercy Nuesca, the Zip Books Project Coordinator, at nuesca@northnetlibs.org. Also be sure to visit NorthNet Library System’s Zip Books webpage (https://northnetlibs.org/zip-books/) for additional information and documents, including Frequently Asked Questions and an up-to-date list of all participating Zip Books Libraries. You may also ask questions of your Zip Books peers at ZIPBOOKS@LISTSERV.PLPIINFO.ORG.

These are the significant steps and milestones to achieve between your invitation to participate in the program and the launching of your Zip Books service:

1. The Zip Books Project Coordinator will work with staff at the State Library to determine your annual allocation, factoring in the number of registered borrowers.

2. You will be notified of your allocation via email and you will also receive an electronic letter from the State Library confirming this allocation.

3. Your library director and your library’s Zip Books coordinator will be asked to sign a commitment letter that spells out some of your responsibilities as a participating library. A sample of this letter is included in Attachment A.

4. The Zip Books Project Coordinator will arrange to have English and Spanish promotional materials—bookmarks, etc.—sent to your library. Examples of these materials are included in Attachment B and are also available for download through our Zip Books website: https://northnetlibs.org/zip-books/. Libraries are also welcome to adapt/develop their own marketing materials. A sample flyer created by Redwood City Public Library to promote audiobook requests is shown in Attachment C.

5. The Zip Books Project Coordinator will subscribe you and any other library staff working with Zip Books to the statewide Zip Books Listserv (ZIPBOOKS@LISTSERV.PLPIINFO.ORG), as well as add you to the Zip Books email list to receive monthly news and updates. Libraries are requested to notify the Project Coordinator of any staffing changes.

6. Once the commitment letter has been signed and returned, the Zip Books Project Coordinator will ask you to:
   
   a. Create a standard Amazon account distinct to Zip Books using a dedicated email address
   b. Apply for an Amazon Corporate Credit Line (ACCL), Pay-In-Full Credit Line option
c. Subscribe for Amazon Prime Membership using one of two options. This will make you eligible for free, two-day shipping.

d. The instructions on how to achieve these steps are detailed in the “Zip Books Amazon Account Procedures” document, included below as Attachment D or available on the Zip Books website: https://northnetlibs.org/zip-books/.

7. After you have created an Amazon account and subscribed to Prime, forward the Amazon account name, password, and Prime expiration date to the Zip Books Project Coordinator via email.

8. Notify the Zip Books Project Coordinator when your credit line has been approved.

9. Concurrent with steps 6-8 above, you will need to develop some internal documents and processes. While libraries are given the flexibility to determine processes and policies that best suit their needs, there are certain policies and “best practices” that are set forth by the State Library and NorthNet. Review the “Zip Books Purchasing Policies” and “FAQ for Participating Zip Books Libraries” documents (both available online: https://northnetlibs.org/zip-books/) to ensure that your local policies and procedures abide by these established program rules. Prior to launching Zip Books, you will need to have the following in place:

   a. Develop procedures for the library staff who will deliver the service. Procedures should inform staff of cost limits per item ($50 pre-tax for books, $75 pre-tax for audiobooks and foreign language items), loan periods, number of items patrons can request at a time/per month (maximum limit of 5), instructions on how to track items via Excel or other means, and instructions on how to process returned items. Sample staff procedures are available below from Kings County Library (see Attachment E), Lake County Library (Attachment F), and Mendocino County Library (Attachment G).

   b. Consider developing staff instructions on how to order an item via Amazon, including how to place gift notes for patrons that explain how to return the item. An example from Redwood City Public Library is available in Attachment H. Be aware that non-Prime items purchased do not have the option to include a gift note, so you will need to notify the patron via other means as to when and how to return the item to your library.

   c. Create your patron request form. Sample print request forms are available in Attachment I and J. Sample online request forms are available from Lake County Library (using Google Forms: https://bit.ly/2x3mgTj), Riverside Public Library (using SurveyMonkey: https://www.surveymonkey.com/r/zipbooksrpl), and Riverside County Library System (http://www.rivlib.net/website/zip-books-3695). San Rafael Public Library has also created a bilingual online form for their patrons (http://srpubliclibrary.org/booklovers/zip-books/zip-books-order-form/).
d. Some participating libraries send an email to patrons letting them know that library staff have ordered a Zip Book for them. Staff also create a gift message for the patron when ordering the book on Amazon. Sample email and gift message wording are available in Attachment K. For patrons that do not have email, Lake County developed print notices that are sent via USPS (see Attachment L).

e. All libraries need to develop a tool, such as an Excel spreadsheet, to internally track Zip Books. This internal tracking system should also be used to gather statistical data that your library will be required to report on a regular basis (see #14 below). An example of a tracking spreadsheet is included in Attachment M.

f. Discuss and develop promotional strategies for publicizing your Zip Books program, including posting the provided marketing materials in your library (Attachment B), developing your own marketing materials (Attachment C), or creating a press release (an example is provided in Attachment N). Libraries have found success promoting and growing their programs by being both visible in the library and online, and by word-of-mouth.

g. Consider creating a public information sheet or library webpage that describes the Zip Books program and provides information on how patrons can request an item. A sample information sheet is available in Attachment O. Sample Zip Books webpages have been created by Corona Public Library (https://bit.ly/2ZgrLuN), Harrison Memorial Library (https://bit.ly/2Zjtmh), and Kern County Library (http://www.kerncountylibrary.org/zipbooks/).

10. Using the “Zip Books Launch Checklist” as a reference (see Attachment P), notify the Zip Books Project Coordinator once your internal procedures and documents are in place.

11. Consider doing a “soft launch” for your program to give your library staff the opportunity to become familiar with the procedures and work out any kinks. Having library staff submit personal requests is a good way to test out both sides of the system.

12. Launch the service in your library!

   a. Patron requests an item that the library does not own. If staff know that this is an item that should be in the collection, staff purchases the item with library funds. If this is an item that staff would normally borrow via ILL or would not purchase for collection, staff may purchase the item via Zip Books.

   b. Staff orders the item via Amazon and follow processes outlined in their staff procedures (see 9b above).
c. Patron returns item and library staff decide whether to add it to the collection. Mendocino County developed a form for staff that flags a returned Zip Book (Attachment Q). Unwanted Zip Books items must first be offered to other Zip Books libraries via the Listserv (ZIPBOOKS@LISTSERV.PLINFO.ORG) or offered to other participating libraries within your consortium prior to donating the item to your Friends of the Library. A sample of a discard list is shared in Attachment R.

13. Scan and email your monthly Amazon invoices as a PDF file to NorthNet at ZipBooksInvoice@northnetlibs.org within three days of receipt. NorthNet will pay the invoice. Invoicing instructions are further explained in the “Zip Books Invoicing Procedures” document, available below as Attachment S or on our website: https://northnetlibs.org/zip-books/.

14. Statistical reporting is also required on a regular basis in order to provide monthly data to the State Library. Detailed instructions are provided in the “Zip Books Reporting Procedures” document (see Attachment T). A screenshot of the reporting form is shown in Attachment U, and a sample completed form is shown in Attachment V. All three documents are available on the Zip Books website: https://northnetlibs.org/zip-books/.

15. Enjoy!
Attachment A—Commitment Letter

Zip Books Project
Participant Letter of Commitment

On behalf of the , I agree to support the goals of the Zip Books Project (a project to test an alternative to traditional interlibrary loan services). Specifically, I certify the Library’s commitment to each of the points listed below for the period of July 1, 2019 – June 30, 2020:

1) The Library will assign at least two staff members, one supervisory and one support staff, to participate in the project. One of these shall be designated as the Library’s primary contact for project activities. The Library will inform the project coordinators at NorthNet if there are any changes to the staffing assigned to the project.

2) The Library will provide release time, space, and computer support for all assigned staff members, for any online project meetings or conference calls scheduled by NorthNet/California State Library. And assigned staff will attend online meetings/conference calls as required by NorthNet/California State Library.

3) The Library will ensure that staff members follow the policies, procedures and guidelines as outlined in the project documentation (https://northnetlibs.org/zip-books/) and as communicated via listserv and e-mail by the project grant monitor at the State Library and the project coordinators at NorthNet.

4) The Library will regularly monitor its Zip Books purchases, to stay within its allocated funds for the project year, and notify the project coordinators at NorthNet if they are encountering any delays, difficulties, or anticipated over expenditure or under expenditure of funds.

5) The Library will work to expend the full amount allocated to their program within the stated time. NorthNet/California State Library reserves the right to reallocate unspent funds to address the funding needs of other libraries.
6) The Library will offer any Zip Books purchases not added to their collection to other participating Zip Books Libraries throughout the state or within their consortium prior to donating it to their Friends of the Library.

7) The Library will keep project statistics as specified by NorthNet and the California State Library, and report them as requested.

8) The Library will participate in mid- and end-of-project surveys.

9) The Library will complete and submit all requested project documents and the final project survey, by the requested deadlines, including monthly invoices and order history reports.

Further, as the Library Director and/or designee, I personally will monitor the project activities and participate as much as possible.

Director Name: __________________________________________________________

Director Signature: ______________________________________________________

Designee Name: __________________________________________________________

Designee Signature: _______________________________________________________

Date: __________________ Library: __________________
Attachment B—Promotional materials in English and Spanish
(bookmark, bookplate, postcard, and poster)
Getting Started with Zip Books

This item was purchased for the Library through Zip Books, a statewide project of the NorthNet Library System, funded by the California State Library.
…Your Library. Delivered.
Ask how to get books or audiobooks mailed directly to you!

Zip Books is a statewide project of the NorthNet Library System, funded by the California State Library.

---

…Su Biblioteca. A su alcance.
¡Pregunte cómo usted puede recibir directamente por correo libros o audiolibros!

Zip Books es un proyecto a nivel estatal del Sistema de Bibliotecas de NorthNet, financiado por la Biblioteca Estatal de California.
...Your Library. Delivered.

Ask how to get books or audiobooks mailed directly to you!
...Su Biblioteca.
A su alcance.

¡Pregunte cómo usted puede recibir directamente por correo libros o audiolibros!

Zip Books es un proyecto a nivel estatal del Sistema de Bibliotecas de NorthNet, financiado por la Biblioteca Estatal de California.
Attachment C—Sample additional promotional material created

Looking for an AudioBook that the Redwood City Public Library doesn’t own?

Have it sent to your home with our ZipBook Project!

Fill out the form online to order the book:
https://www.redwoodcity.org/departments/library/services/zip-books

Zip Books is a statewide project of the California State Library and NorthNet. The project is funded by the California Library Services Act.

redwoodcity.org/library
Attachment D—Amazon account procedures

Zip Books Amazon Account Procedures

This is an overview of how to set up your Amazon account. Some steps may take longer to complete, so it is recommended that you begin as soon as possible. You will need to complete the following tasks before you can launch Zip Books at your library:

1. Create a standard Amazon.com account that will be dedicated to the Zip Books project
   a. This standard Amazon account will be used for Zip Books orders only. No other orders should be placed through this account to avoid confusion.
   b. In order to create this new standard Amazon account, a local email address not currently used by another existing Amazon account will be required. Some libraries have requested a new universal/shared email address internally to be used, such as zipbooks@XXXXXlibrary.org, which can also be accessed by multiple library staff for administering this account. Using a dedicated staff member’s email address would work but can limit other staff members access to administer the Amazon account.
   c. Once your account has been created, please share the login information with the Zip Books Project Coordinator for administrative and fiscal purposes.
   d. If your library chooses to set-up an Amazon Business Account instead, note that the annual fee for this type of account and the increased Prime Membership fee must be paid by the library out-of-pocket and is not covered by Zip Books at this time. Instructions, such as how to generate an Order History report, will also differ from those stated on our program procedural documents.

2. Apply for an Amazon.com Corporate Credit Line – Pay-In-Full Credit Line
   a. If this is your library’s first Amazon Corporate Credit Line, go to: https://www.amazon.com/gp/cobrandcard/marketing.html?ie=UTF8&pr=ibprox
   b. If your library already has an existing credit line used for various purposes, you will need to set up a second credit line that is used solely for Zip Books (skip to STEP 3).
   c. Choose the Pay-In-Full Credit Line option (NOT the credit CARD option).
   d. Use the same account information used for the standard Amazon account created for the Zip Books project (using the same email address and password as the Amazon account used for Zip Books will ensure the Amazon Corporate Credit Line is linked to your standard Amazon created for the Zip Books Project).
   e. Follow the instructions on the Amazon Corporate Credit Line (ACCL) site and fill out the online application form as instructed within.
   f. Once the ACCL is approved and created by Amazon it will automatically link to your standard Amazon account used for Zip Books as an available payment method.
g. Set Amazon Corporate Credit Line as your default payment method in your Zip Books Amazon account (should be the only available payment method listed in this account).

h. Notify the Zip Books Project Coordinator when your credit line has been approved.

i. If your library is unable to establish an ACCL, notify the Zip Books Project Coordinator and an NLS Credit Card will be set up for your library.

3. Apply for a second Amazon Corporate Credit Line:

   a. **THIS STEP IS ONLY FOR LIBRARIES WHO HAVE AN EXISTING CREDIT LINE.** All others should proceed to STEP 4.

   b. To reapply for a second Pay-in-Full Credit Line with Amazon, go to:

   https://www.amazon.com/gp/cobrandcard/marketing.html?pr=ibprox&inc=poinv&platte=marketing&plattr=GNO_CCL

   c. Fill out the form exactly as you did the first time EXCEPT you now must also fill out the line "Doing Business As Name (if different than legal name)" and enter a name such as "Collection Development", “Zip Books Project,” etc.

   d. Submit the application. **NOTE: It will be rejected because Amazon thinks you are trying to open two credit lines at the same address, which you are.**

   e. Call Synchrony at 1-866-634-8381. Let them know that you want to set up a sub-account or “parent-child” account to your existing account.

   f. Representatives with Synchrony will walk you through the process on the phone.

   g. You will now receive your regular credit line statement each month and a second statement distinct to Zip Books.

4. Subscribe and pay for an Annual Prime Membership for that account

   a. **OPTION 1 - Purchase an Annual Prime Membership using your library’s own credit card or your NLS Credit Card (if issued one).** For reimbursement, complete the “Amazon Prime Fee Reimbursement Claim form” (available on the Zip Books website) and submit to ZipBooksInvoice@northnetlibs.org along with the order invoice once the payment goes through. Once done, be sure to remove your library’s credit card from your Amazon account to prevent any other accidental charges. Libraries with an NLS credit card do not need to submit a reimbursement claim form.

   b. **OPTION 2 – Request a gift membership from NorthNet.** If you are unable to accommodate Option 1 above, notify the Zip Books Project Coordinator and we will provide you with a Prime gift membership. We will need to know the exact date your Prime Membership expires and the email address where to send the gift membership. We will not be able to send the gift membership to another email address once it’s already been purchased.

   c. Note that Amazon does not allow you to pay for your Prime membership using your Corporate Credit Line due to the different billing periods.
d. The cost of Prime membership (new or renewal) is covered by the grant and does not come out of your allocation.

e. Once your Prime membership is established, please forward the expiration date and the total amount paid to the Project Coordinator for tracking.

5. Renew your Prime membership

a. To find out when your Prime membership expires, log into your Zip Books Amazon account. Select “Account & Lists”, then click on “Prime”. You will find the date listed on the left-hand side. Amazon will also notify you when it is time to renew.

b. **DO NOT RENEW EARLY.** To avoid any confusion or overlap, it is important that you only renew your membership the day after it expires. Renewals are immediate, and you will not lose any interruption in service.

c. Renew your membership using one of the options listed in STEP 4.

d. Libraries using the NLS Credit Card should use this same card to renew your membership. You do not need to submit a reimbursement claim form.

e. Libraries may choose to set their Prime membership for automatic renewal (*make sure your payment method is up-to-date*). However, if you are using a city/county credit card, we recommend you only do this a few days prior to your Prime membership expiring so as to avoid any accidental charges. If any Zip Books orders are accidentally charged to your credit card instead of your corporate credit line, you can submit a “Zip Books Expense Reimbursement Request Form” (available on the Zip Books website).

f. Once renewed, please notify the Project Coordinator of your new expiration date and the total amount paid for tracking purposes.
California Library Services Act (CLSA)

ZIP BOOKS PROJECT

AMAZON PRIME FEE REIMBURSEMENT CLAIM FORM

Reimbursement will be made by check payable to the library name listed below and sent to the following address:

Please type or print clearly:

Date of Request _____________________

AMAZON Prime Membership Fee: $____________________

Library Name:______________________________________________________

Address: ___________________________________________________________

Phone #: ________________________________________________________

Signature:__________________________ Date:__________________

(Signature Required)

Please sign and email completed Reimbursement Claim form to ZipBooksInvoice@northnetlibs.org with a copy of the paid Amazon Prime membership fee receipt. Should you have any questions, please contact NLS Accounting at (650) 349-5538.

PLEASE USE THIS DOCUMENT FOR ONLY AMAZON PRIME MEMBERSHIP FEE REIMBURSEMENT

10/17/18 Version No. 1
California Library Services Act (CLSA)

ZIP BOOKS PROJECT

ZIP BOOKS EXPENSE REIMBURSEMENT REQUEST FORM

Reimbursement will be made by check payable to the library name listed below and sent to the following address:

Please type or print clearly:

Date of Request _____________________

Zip Books Expense To Be Reimbursed: $____________________

Attach Amazon Paid Order Receipts.

Library Name:______________________________________________________

Address: ___________________________________________________________

Phone #: ___________________________________________________________

Signature: ________________________________ Date: ________________

(Signature Required)

Please sign and email completed Zip Books Reimbursement Request form to ZipBooksInvoice@northnetlibs.org with a copy of the paid Amazon order receipt. Should you have any questions, please contact NLS Accounting at (650) 349-5538.
How to request a Zip Book for a patron:

- Patrons must have their library card in hand.
- A valid Kings County Library Card with the code of KIAD, KICH, KIST only. An account in good standing is required (Less than $5.00 in fines).
- Check Horizon for the title of book or audiobook to ensure that Kings County Library or any member of the San Joaquin Valley Library System does not own the book.
- No fee to request a Zip Book.
- Only one Zip Book may be requested at a time. A previous Zip Book must be returned and the survey completed before requesting another. No exceptions.
- Books may be requested in regular print format, large print format, or audiobooks on CD.
- Books costing over $35.00, out-of-print books, books or audiobooks that were published within the last 12 months may not be requested as Zip Books.
- Patrons can keep Zip Book for 3 weeks. If the item is not returned, the patron will be charged the full amount of the item.
- Their Zip Book will be shipped directly to their house. A gift slip will be included. The gift slip will say: "Thank you for your request. After 3 weeks, please return this slip & book to the Kings County Library."
- Patrons may not request more than two Zip Books per month.
- Library patron must be present to place the order. We do not take Zip Books requests over the phone

Once the Zip Book order has been placed, put a note on the patron’s account that a Zip Book has been ordered. This will remain until the book is returned.
Returning Zip Books:

- The patron must return the item on or before the end of the three week check out time to staff at any Kings County Library Branch circulation desk with the Gift Slip in the book.

- The return of a Zip Book is not considered complete without the Gift Slip.

- Zip Books can **NOT** be returned in the Book Drop.

- Once the book has been returned and survey complete:
  
  - Delete the Zip Book note on the patron’s account
  
  - Send the book in transit to Tamara at the Hanford Branch Library.

- Another Zip Book may be requested at that time.

- The Library decides whether to add the book to the collection or donate to the Friends of the Kings County Library.

*If a patron’s request does not meet the requirements for Zip Books, encourage them to use regular ILL with a $15.00 fee.*
Attachment F—Staff procedures from Lake County Library

Zip Books Manual

April 2018

Placing Amazon orders.
I usually place Zip orders once or twice a week, in a batch. To do a Zip order you need:

- The Zip requests Google spreadsheet online
- Amazon
- OCLC Connexion
- OCLC cataloguing utility [the “suitcase”]
- Horizon

In Zip Requests response Google forms spreadsheet, sort by PATRON NAME [click the upper left corner of the spreadsheet where the numbered rows and lettered columns join. Click the DATA menu. Choose Sort by COLUMN D. Each patron can have two active Zip requests, that is, items that are checked out to their cards.

Patron Requests
Go through the list of patrons to see which patrons have unprocessed requests. Look up each patron in Horizon to check for fines and fees over $10. Check to see if the patron has a Zip Book checked out. If the patron’s account is good and has no more than 1 Zip Book, you can place the Zip order in Amazon. You can spot Zip Books because the I-type shows as LZIP.

Check Horizon to see if the book is available there. If so, request it in Horizon for the patron. In the patron request spreadsheet, type HORIZON in the Status cell. Highlight the request details and choose Strikethrough to cross out the text. Fill the request detail cells with light orange. Do not delete the text; you might need to refer to the request in the future. Retain the request information for about 6 months because sometimes you will need to refer to it.

If the patron has Zip Books CKO, find the new request(s) in the spreadsheet, enter WAIT in the Status cell, and fill it with lime green.

If the patron has outstanding fines, fill the Status cell in turquoise. Type FINES in the Notes cell and fill with turquoise.

When the patron clears the fines or returns a Zip Book, you can fill the next request.

Amazon Search
Go to Amazon. Search for the patron’s item.

If the item is in Amazon Prime and the price is under $35, we can order it. If the item is $35 or more, we have to email the Zip Books Project Coordinator to ask permission to order it.
If the item is not published yet, go to the patron spreadsheet and enter the projected publication date in the Notes cell and fill that request with turquoise. Type PENDING in the Status cell.

**OCLC Records**
When we order something from Amazon, we also download the OCLC MARC record into Horizon. If there is no OCLC record we can’t order the book UNLESS IT’S BY A LOCAL AUTHOR. [Sonoma County Library will do special cataloguing on those items] Find and export the OCLC record that matches the Amazon item. When you finish placing Amazon orders, import the OCLC records into Horizon.

**Amazon Ordering**
Find the item. Select **Amazon Prime** copies only, $35 or under. Select **new** items, **hard cover** if possible. Put it in the cart. Proceed to checkout. Choose the patron from the list of addresses, or add a new patron [look near the bottom of the page for the link.] Use the Zip Visa card [number xxxx in the password book] for existing patrons, or enter it for new patrons. Choose **Use this payment method**.
Click on **Add a Gift Receipt**. Edit the text for the gift receipt:
*Dear Patron. Your ZIP BOOK ~TITLE~ is checked out on your library card and is due DATE 4 weeks from order date. The barcode is 25253000xxxxxx. Please return this note & the book to a library employee. From Lake County Library 263-8817.*
Get a barcode from the roll. Scan it into the gift receipt] [NOTE if the gift message is too long, the Save button will be grayed out. Delete some spaces and it should clear the problem.]
Place the Amazon order.
To print the invoice:
In Amazon-
1. Click Review or edit your order.
2. View or Print Invoice.
3. Print this page for your records.
4. Print.

Paper clip the barcode to the invoice.
- Get the **Call Number info from the OCLC online record** and write it on the invoice.
- Write the OCLC number on the invoice in case you need to refer to it later.

In the Zip spreadsheet, type ORDERED in the Status cell. Highlight and Strikethrough the text of the request details. Clear any colored fill.

**Horizon: Begin the processing.**
Import the OCLC MARC records. In the Copy Item List create a new item using the barcode assigned to that book. Change the record so the I-type is LZIP and use the real collection code. Use the price that’s on the invoice.
Horizon: Zip Books to finish processing.
After patron returns the book, make sure book is checked in. Pull the Amazon invoice from the Zip Books file on the ILL processing cart.
[We do not process all Zip Books; not all mass-market paperbacks and graphic novels are automatically processed. Other items might not be useful for our collection. Christopher is the ultimate authority on that choice.]
In Horizon open the item record. Edit to change the I-type to L21DAY. Books published within the last two years should go in the NEW collection. Change the price to match the price on the book instead of the Amazon Prime price.
Attach the usual stamps and library labels. Put a Zip Book bookplate in the front of the book. Bookplate master is in the E drive LOCATION. Enter the Zip books in the Library Statistics spreadsheet.

Zip Title Spreadsheet. This is on the E Drive. It lists books ordered in the Zip Books, if they are accessioned, if the Zip bookplate has been applied.

Other Zip Book tasks
Check the Amazon orders on the Lake County Library Zip account regularly to make sure the books are being delivered to the patrons. You can see the tracking information. Follow up if the books are delayed. See How to Find Amazon Help below.

Check the Zip Books Gmail account regularly [lakelibzipbks@gmail.com, fastlibros]. Delete routine order confirmation/shipping/delivery emails. Watch for messages about delivery delays and problems and follow up as needed.

Amazon Order reports. In Amazon create order reports to see how we’re spending our allotment, see who is ordering, etc. Go to Account and Lists > Your Account > Ordering and shopping preferences > Download order reports

Amazon Invoices. Go through the file of Amazon Zip invoices monthly to see if items are getting back to the library.

How to find Amazon help.
Amazon has a help desk but it’s very well hidden. INSTRUCTIONS.
Attachment G—Staff procedures from Mendocino County Library

ZIP BOOK INSTRUCTION

1. Previous zip return?
2. Does it qualify $?
3. Search in Horizon
4. Check account for mg borrower type and fees ($10 or less)
5. Check address in Horizon – call if different
6. Add to cart
7. Check this is a gift (if avail)
8. Create new item in Horizon and add barcode, Title: * (MENDO ZIP)
9. Double click item to edit due date
10. Type free personal message (if avail) highlight due date and add barcode
11. Order
12. Edit item w/send to Copy/Item list
   Itype mzip, collection ill, checkin note “SEND BACK TO UKIAH (#*)”
13. Add info to excel spreadsheet
14. Email note or call patron
15. File the email

Amazon.com Gift Note

Thank you for your Zip Book request. This book is checked out to you (barcode: * ZIP) and due by *. Please hand to library staff for them to check in. Enjoy! MENDOCINO COUNTY LIBRARY

Hello ^,
The Mendocino County Library has processed your Zip Book request today. The item ^ by ^ should be delivered via Amazon to your address within a few days. This item is checked out to your library account and is due by ^. This item is subject to the usual library late fees and replacement costs. Please return the item (with the enclosed packing slips if available) by handing it directly to staff at any branch of the Mendocino County Library. It may then be added to the county library collection or passed along to another Zip library. For more information, please contact 707-472-0143.

Zip Books is a grant project provided in partnership with the California State Library and the NorthNet Library System. It is supported by California Library Services Act funds.

Thank you and enjoy!
Attachment H—Amazon ordering instructions

Instructions for purchasing Zip Books

1. Check Library Catalog for item.
2. Select item, select format. MUST be available using Prime. May purchase used items if Prime shipping is available.

3. Select “Add to Cart” and make sure quantity is “1”.

Amazon ordering instructions for Zip Books.

Getting Started with Zip Books – Updated 8/22/19
4. Select “Proceed to checkout” and make sure quantity is “1”.

5. Click on “Change” to change the shipping address to customer’s address.

6. Click on “Add a new address”
7. Fill in information for customer. Select “Use this address”.

Enter a new shipping address

Full name: 
Address line 1: 
Address line 2: 
City: 
State/Province/Region: 
ZIP: 
Country: United States
Phone number: 

Additional Address Details

Preferences are used to plan your delivery. However, shipments can sometimes arrive early or later than planned.

Weekend delivery:
› Which days can you receive packages?

Security access code:
e.g. Access code ‘123’ or ‘Buzzer – #504’ or ‘Key’ or ‘Smart Card’

[ ] Use as my default address.

Make sure your address is correct
If the address contains typos or other errors, your package may be undeliverable.
Tips for entering addresses | APO/FPO address tips

[ ] Use this address 
Cancel
8. Choose a payment method. Click on “Use this payment method.” The Amazon Corporate Credit Line should be used.

9. Select “Add a gift receipt.” This allows us to add a message onto the package.
10. Edit the Gift Message to say:

Thank you for your request. When finished, please return the enclosed item(s) to the staff at the downtown RCPL front desk. Another Zip Book item cannot be requested until returned.

Thank you, Redwood City Public Library
11. Select “Save gift options and continue”

12. Make sure the FREE Two-Day Shipping is selected.
13. If all information is correct, select “Place your order”

14. Update Zip Books Requests spreadsheet:

1. Customer Name
2. Title,
3. Author
4. FormatType
5. BookGenre
6. Language
7. Date Requested (from the date on the survey form)
8. Arrival Date (date item will arrive at customer’s home)
9. Item Cost
15. Send email to customer, update arrival date.

Thank you for requesting a Zip Book. Your item is expected to arrive on MONTH DATE, YEAR. Keep the item as long as you want. When you are finished with the item, return it to a staff member at the front desk of the Redwood City Downtown Library and let them know it is a Zip Book. The item will then be taken off your record and you may request an additional item (Total of 3 per month). If the Zip Book is returned in the self-check or outdoor book returns it will not be removed from your account. You would be responsible for the whole cost of the item if you want to use the service again.

Zip Books is a grant project provided in partnership with the California State Library and the NorthNet Library System. It is supported by California Library Services Act funds.

16. Relocate customer request email to the “Completed Requests” folder.
**Attachment I—Patron request form 1**

**ZIP BOOK REQUEST**  Patron Name/Branch

Patron ID:_________________________ Date:_________________________ Phone (____ ) __________

Address:__________________________________________________________________________

Email:_____________________________________________________________________________

Title:______________________________________________________________________________

_________________________________________________________________________________

Title:______________________________________________________________________________

Author:____________________________________________________________________________

Format: ______ Print ______ Audio ______ Large Print ______ Staff Initials ______

Category:

___ Adult Fic    Bestseller    Yes    No    ___ Children’s Fic    Bestseller    Yes    No

___ Adult Non-Fic    Bestseller    Yes    No    ___ Children’s Non-Fic    Bestseller    Yes    No

___ YA Fic    Bestseller    Yes    No    ___ Foreign Lang Fic    Bestseller    Yes    No

___ YA Non-Fic    Bestseller    Yes    No    ___ Foreign Lang Non-Fic    Bestseller    Yes    No

___ Other (List)______________________________________________________________________

Fill in below as applicable

<table>
<thead>
<tr>
<th>Item</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Date ordered: ________________ Staff initials: ______

Item return date/staff initials: __________________________ Notes: __________________________

_________________________________________________________________________________

Returned item was: ______ Added to collection ______ Donated to Friends

______ Other (explain) ________________________________________________________________
Can’t find what you want at the library? We currently have access to a free interlibrary loan option called ZIP Books which allows the library to purchase items that we don’t have in the catalog.

ZIP Books:
- Are free for Mendocino County Library cardholders, paid for by the library with grant funds from the California Library Services Act.
- Ship directly to your address via Amazon.com (must be available for $35 or less)
- You return the item to library staff 4-6 weeks after receiving it in the mail
- Limit of 1 item per person per month
- DVDs and music CDs are not available
- Returned ZIP items may be added to the Mendocino County Library’s collection or offered to other participating libraries for their collections. For more information, call 707-472-0143.

Your Name:  
Library Card #:  
Date:  
Phone #:  
Email:  
Mailing Address (ZIP Books requests will ship directly to this address):

Title:  
Author:  
Publisher/Date (optional):  
Format: [ ] Book  [ ] Book on CD  [ ] Large Print  [ ] DVD  [ ] Music CD
Standard ILL request ($2):

You can also place a standard Interlibrary Loan request for a $2.00 non-refundable fee by checking the box at the bottom of this form. We will then try to borrow your requested item from another library in the U.S. Most DVDs are not available. No pre-publication items.

Pick-up location:

☐ Ukiah  ☐ Willits  ☐ Fort Bragg  ☐ Coast  ☐ Round Valley  ☐ Bookmobile

☐ I would like to pay a $2.00 fee to have the library perform a standard Interlibrary Loan search for this item. I understand that this fee is non-refundable whether or not the item I requested is available. (If the lender also charges fees, the library will notify you of the amount before we proceed any further.)
Customer Zip Books Messages

Amazon Gift Message
Thank you for your request. Another Zip Book item cannot be requested until returned. Thank you, Redwood City Public Library when finished, please return the enclosed item(s) to the staff at the downtown RCPL front desk.

Email Message to Customer:
Thank you for requesting a Zip Book. Your item is expected to arrive on MONTH DATE, YEAR. Keep the item as long as you want. When you are finished with the item, return it to a staff member at the front desk of the Redwood City Downtown Library and let them know it is a Zip Book. The item will then be taken off your record and you may request an additional item (Total of 3 per month). **If the Zip Book is returned in the self-check or outdoor book returns it will not be removed from your account. You would be responsible for the whole cost of the item if you want to use the service again.**

*Zip Books is a grant project provided in partnership with the California State Library and the NorthNet Library System. It is supported by California Library Services Act funds.*
Attachment L—Patron notices to send via USPS

Print Notice 1:

Lake County Library Zip Book request information

Your request for

________________________________________________________

will be filled by a Zip Book that will arrive in your mail __________
The book is checked out to you for 4 weeks. Due date __________
Save the Amazon paperwork that comes with the book.
When you finish the book, return it and the Amazon note to a library circulation employee. Please tell the employee that it’s a Zip Book.
~ ~ from the Lake County Library interlibrary loan department. 263-8817 x 17106
Shipper is _____________________________________

Print Notice 2:

Unable to obtain the item you requested at the Lake County Library
You recently requested this title through Zip Books.

________________________________________________________

The library is not able to get this for you.

• There is no Amazon Prime-eligible copy.
• The price exceeds the limit for a Zip book.
• Amazon does not carry it.
• Out of print.
• This item isn’t published in the format you requested.

The library might be able to borrow this from another library through interlibrary loans. The request form is on the Lake County Library website. All interlibrary loan items are now charged a $3.00 postage fee when they arrive in Lake County.

Lake County Library, 1425 N. High Street, Lakeport CA 95453. 707-263-8817
Attachment M—Sample spreadsheet to track items

Zip Book Requests

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Title</th>
<th>Author</th>
<th>Format Type (Book, Large Print, Audiobook)</th>
<th>Book Genre (AD FIC, AD NF, YA FIC, YA NF, J FIC, J NF, INT FIC, INT NF)</th>
<th>Language</th>
<th>Date Requested</th>
<th>Arrival (Received) Date</th>
<th>Item Cost</th>
<th>Email Sent/Called</th>
<th>Return Date</th>
<th>Added/FOL/Other Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms. Sarah La Torra</td>
<td>Twilight</td>
<td>Meyer</td>
<td>Book</td>
<td>YA FIC</td>
<td>English</td>
<td>3/26/18</td>
<td>3/30/18</td>
<td>$19.99</td>
<td>4/10/18</td>
<td>FOL</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Remaining Budget: $14,000.00
Attachment N—Example of a press release

COUNTY OF LAKE
County Library
1425 North High Street
Lakeport, California 95453

Lake County Library
Press Release
March 12, 2019
Jan Cook, Library Technician
263-8817 ext 17106 phone; 263-6796 fax
1425 N. High St, Lakeport CA 95453
Jan.Cook@LakeCountyCA.gov

* * * * * * * * * * * * * * * * *

SUBJECT: Library’s Zip Book program is successful
* * * *

By Jan Cook
LAKEPORT— The Lake County Library is celebrating several milestones with the Zip Books program which delivers library books from Amazon to the library patron’s home. Since Lake County joined the Zip Book program in 2015 the library has received 1500 requests from the public and added 1000 books to the library collection. The Zip program has supplemented the library’s book budget by about $5,000 per year.

Library patrons like the innovative service. In a recent anonymous survey, one patron said, “I love the Zip Books! I use it when I find an interesting review of a book that I can’t get at the library.” Another exclaimed, "I wish Zip Books were available fifty years ago!"

In the Zip Book program, library patrons request regular print books, large print books and audiobooks that the Lake County Library doesn’t own. If the library already owns the title as a printed book, the library can still order a audiobook or a large print book through the Zip program. The Zip Books request form is on the Lake County Library’s website library.lakecountyca.gov under the “Books and More.”

Requested books that meet the Zip Books program criteria are ordered by the library and shipped to the patrons’ mailing addresses. Each book is checked out to the borrower and has a due date. The patrons are expected to return the books to the library. Upon return, most Zip Books are accessioned into the library catalog and receive a special Zip Book bookplate.

Zip Book patrons have diverse tastes and interests, all of which contributes to the diverse mix of titles for adults and children that have been added to the library. In non-fiction, subjects include history, religion, fishing, woman suffrage, cooking, knitting, science and current events. In fiction, the library has added mysteries, science fiction, graphic novels, romance novels and general fiction.
Carolyn Brooks, California State Library Project Monitor says, “The goal of the Zip Books Project is to expand the use of an alternative model for interlibrary loan service that, over time, has proved cost effective, easy to use, and extremely popular with the public. The project started in 2013 with 15 libraries; currently over 68 library jurisdictions across the state are participating, with more being added all the time.”

Brooks continues, “Zip Books is a partnership between the California State Library and the NorthNet Library System. It is supported with California Library Services Act funds.” The California Library Services Board recently approved an additional allocation of $1 million for libraries across California to support and expand the Zip Books program through June, 2022.

The Lake County Library is on the internet at http://library.lakecountyca.gov and Facebook at Facebook.com/LakeCountyLibrary. For more information about Zip Books or the library, call 263-8817.
Attachment O—Patron information sheet

**How Zip Books Process Works:**

Request a Zip Book at the circulation desk of any branch of the Kings County Library. You must have your library card in hand. Books that the San Joaquin Valley Library System does not yet own - and that are at least one year old - may be requested as Zip Books.

You are limited to one Zip Book at a time. You must return your Zip Book before you can request another.

You may request books in regular print format, large-print format, or audiobooks on CD.

Books costing over $35.00, books out-of-print, or books that were published within the last 12 months may not be requested as Zip Books.

When your Zip Book arrives, a gift note in the book will say the book "Thank you for your Zip Books order. After 3 weeks, please return this slip & book to the Kings County Library" and that it is your library Zip Book. Keep the slip in the book until you return it to the Library.

Borrowers may request no more than one Zip Book per month.

Borrowers can keep the book for 3 (three) weeks.

**RETURNING YOUR ZIP BOOK**

When you finish reading the book, return it to the staff at any Kings County Library circulation desk, with the Gift Slip in the book.

Do NOT return your Zip Book through the book drop.

You will be asked to complete the ZIP book survey.

After returning your Zip Book and completing the survey you are eligible to request another Zip Book when a month has passed.

At the Library’s discretion the book will be added to the Library collection for future checkout or donated to the Friends of the Kings County Library.
Attachment P—Zip Books Launch Checklist

Zip Books Launch Checklist

This checklist is intended to help new participating libraries determine if they have all the necessary components in place to launch their Zip Books program. They are listed in approximate order of completion. Further clarification of these components is provided in our “Getting Started with Zip Books” document. This and other supporting documents can be found on NorthNet Library System’s Zip Books webpage: https://northnetlibs.org/zip-books/. Should you have any questions, please contact Mercy Nuesca, the Zip Books Project Coordinator, at nuesca@northnetlibs.org.

☐ Certification of Funding Letter received
  - Your allocation amount should be shared with your Zip Books team to ensure that your program remains on track and under budget.

☐ Letter of Commitment signed and returned

☐ Local contacts added to Zip Books Listserv/email list
  - A local Zip Books coordinator should be selected to oversee the program and serve as point person for your library. Any other library staff involved in the program can also have their name and contact info added to our listserv and email list.

☐ Zip Books dedicated Amazon Account created

☐ Amazon Corporate Credit Line established or NLS credit card issued

☐ Subscribe to annual Amazon Prime Membership
  - Your Amazon login information and Prime expiration date should be shared with the Zip Books Project Coordinator via email.

☐ Zip Books Marketing Materials received, promotion strategies developed

☐ Develop internal documents and processes
  - Establish local policies, such as loan periods and maximum # of requests allowed at once, that comply with set program policies and procedures
  - Staff instructions on how to process requests, order items, track requests, etc.
  - Patron request forms (paper, online, or both)
  - Draft gift message or email notices notifying patrons their request has been processed and how to return the item once done
  - Information sheet or library webpage describing the program
  - Tracking tool using Excel, Access, or other program for internal records and statistics reporting

☐ Conduct “soft launch” or trial run with library staff requests
Attachment Q—Zip Books return form for staff

FOR ZIP RETURNS - STAFF USE ONLY
(updated 9/22/15)

Please complete this portion and return it along with ZIP Book to materials & collection development at the Ukiah Library. Borrower’s next request cannot be processed until this survey and returned ZIP Book are received.

Branch: 
Date: 
Patron Name: Library Card #: 
ZIP Book Title: 
☐ We would like to add this title to the collection 
☐ Patron would like to purchase ZIP Book if not added to another library’s collection

FOR ZIP RETURNS - STAFF USE ONLY
(updated 9/22/15)

Please complete this portion and return it along with ZIP Book to materials & collection development at the Ukiah Library. Borrower’s next request cannot be processed until this survey and returned ZIP Book are received.

Branch: 
Date: 
Patron Name: Library Card #: 
ZIP Book Title: 
☐ We would like to add this title to the collection 
☐ Patron would like to purchase ZIP Book if not added to another library’s collection
# Attachment R—Sample Zip Books Discards List

## Zip Books available from Shasta Public Libraries

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>ISBN</th>
<th>Year</th>
<th>Binding</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Ringing Glass: The Life of Rainer Maria Rilke...</td>
<td>Prater, Donald</td>
<td>9780849943713</td>
<td>2002</td>
<td>paperback</td>
<td>good condition, some page yellowing</td>
</tr>
<tr>
<td>A Warmth in Winter</td>
<td>Copeland, Lori</td>
<td>9780849943065</td>
<td>2001</td>
<td>paperback</td>
<td>fair condition, ex-library</td>
</tr>
<tr>
<td>Blue Gold</td>
<td>Cusler, Clive</td>
<td>2000 audiobook cds</td>
<td>null</td>
<td>audio cdc, abridged</td>
<td>4 audio cdc, abridged</td>
</tr>
<tr>
<td>Horse of a Different Color: Reminiscences of a Kansas Cowboy</td>
<td>Moody, Ralph</td>
<td>9780803282179</td>
<td>1994</td>
<td>paperback</td>
<td>good condition, cover creasing</td>
</tr>
<tr>
<td>How to Train Your Viking (By Toothless)</td>
<td>Cowell, Crescida</td>
<td>9780340917466</td>
<td>2006</td>
<td>paperback</td>
<td>fair, cover creased and scored</td>
</tr>
<tr>
<td>INI 101</td>
<td>HowExpert Press &amp; Lindsay</td>
<td>9781545143711</td>
<td>2019</td>
<td>paperback</td>
<td>like new</td>
</tr>
<tr>
<td>Lake Shasta Caverns</td>
<td>Winter, Radar</td>
<td>1970 pamphlet</td>
<td>null</td>
<td>pamphlet</td>
<td>good condition</td>
</tr>
<tr>
<td>Preston Bound</td>
<td>Dries, Heman</td>
<td>9781980587736</td>
<td>2019</td>
<td>paperback</td>
<td>like new</td>
</tr>
<tr>
<td>Real Ponies Don’t Go Gink!</td>
<td>McManus, Patrick</td>
<td>805016511</td>
<td>1991</td>
<td>hardback</td>
<td>like new</td>
</tr>
<tr>
<td>Seven Days to Confidence: Practical Strategies to Transform by R. Taylor &amp; S. Ros</td>
<td>null</td>
<td>null</td>
<td>null</td>
<td>null</td>
<td>null</td>
</tr>
<tr>
<td>The Chocolate Touch</td>
<td>Cartling, Anthony, Skene</td>
<td>9780688161330</td>
<td>2006</td>
<td>paperback</td>
<td>good</td>
</tr>
<tr>
<td>The House of Mirrors (Ulysses Moore #3)</td>
<td>Moore, Ulysses</td>
<td>9780439776721</td>
<td>2006</td>
<td>paperback</td>
<td>good, light cover creasing</td>
</tr>
<tr>
<td>The Isle of Masks (Ulysses Moore #4)</td>
<td>Moore, Ulysses</td>
<td>9780439776714</td>
<td>2006</td>
<td>paperback</td>
<td>very good</td>
</tr>
<tr>
<td>Teach Like Finland. 33 Simple Strategies for Joyful Cisian Walkers, Timothy D.</td>
<td>null</td>
<td>null</td>
<td>null</td>
<td>null</td>
<td>null</td>
</tr>
<tr>
<td>The Testament of Jesse Lamb: A Novel</td>
<td>Rogers, Jane</td>
<td>9780062130880</td>
<td>2011</td>
<td>paperback</td>
<td>like new</td>
</tr>
<tr>
<td>Tolkien’s Failed Quest</td>
<td>Jones, Michael</td>
<td>9781522406816</td>
<td>2017</td>
<td>paperback</td>
<td>very good, 28 pgs.</td>
</tr>
<tr>
<td>Wolf to the Slaughter</td>
<td>Rendell, Ruth</td>
<td>9780095934882</td>
<td>2009</td>
<td>mass market paperback</td>
<td>fair, stickers on cover, creased spine</td>
</tr>
<tr>
<td>How to Write a Movie in 21 Days</td>
<td>King, Viki</td>
<td>9780062730664</td>
<td>2001</td>
<td>paperback</td>
<td>good</td>
</tr>
<tr>
<td>No Promises In The Wind</td>
<td>Hunt, Irene</td>
<td>978042509698</td>
<td>1993</td>
<td>mass market paperback</td>
<td>good</td>
</tr>
</tbody>
</table>
Attachment S—Invoicing Procedures

Zip Books Invoicing Procedures

This is an overview of the invoicing procedures for all Zip Books orders. All invoices received should go to NorthNet Library System for payment. Double-check that this is the standard Amazon account dedicated to Zip Book orders (no other orders should be placed through this account to avoid confusion).

1. When you receive your monthly invoice from Amazon DO NOT PAY IT. Please immediately scan and email the invoice in PDF format to ZipBooksInvoice@northnetlibs.org for payment.

2. Invoices should be forwarded within 3 days of receipt. You do not need to mail in your hard copies. If an invoice is not received in time and late fees are incurred, the fees will be taken from your allocation. You do not need to mail in your hard copies.

3. Libraries using the NLS Credit Card do not need to submit invoices, as they will automatically be sent to NorthNet. However, you are required to submit an Amazon-generated Order History Report by the 15th each month (see #6 below for instructions on how to create this report). Your monthly limit resets on the 7th each month.

4. Any overpayment to your Amazon Corporate Credit Line (ACCL), shown as a credit or unapplied payment on your monthly statement, should be left alone as a credit in your account. This credit will automatically be subtracted from your following month’s total. You should NOT request a refund check. Should Amazon/Synchrony reach out to you regarding an overpayment, please let them know that you’d like the money to remain in your account as a credit.

5. For auditing purposes, some libraries may be asked to submit individual Invoices/Order Details or an Order History report. Instructions on how to generate these files are below. All files should be sent directly to our Fiscal Department at ZipBooksInvoice@northnetlibs.org.

6. How to create a PDF file of Invoices/Order Details:
   a. Log into your Zip Books dedicated Amazon account
   b. Select “Orders” (near Cart)
   c. Use search bar to locate orders by title and click on “Order Details” next to item
   d. Select “Invoice” (top right corner of order box)
   e. Click on “Print this page for your records” (located at top of page)
   f. Change “Destination” to “Save as PDF”
   g. Click on “Save” and select location
   h. Repeat process for each Invoice requested

7. How to generate an Order History Report:
   a. Go to the instructions page:
      https://www.amazon.com/gp/help/customer/display.html?nodeId=200131240
      If this link does not work, you can find the correct page by searching for "Order
b. Click on “Order History Reports” in Step 1 of “Create an Order History Report”
c. You may be prompted to log into your Amazon account. Be sure you are logged into your dedicated Zip Books Amazon account.
d. Select “Items” under Report Type. This report type will include the item title and shipping information.
e. Select Start Date [7th of previous month] and End Date [6th of current month]
f. Enter a Report Name, using the following format: “Your Library Name 20XX MM 06 Order History” (e.g., “Riverside 2019 02 06 Order History,” for 1/7 - 2/6 purchases).
g. Click on “Request Report”. It may take some time to process, and you will be notified by email when it is complete. Once the report is generated you can then download and email it directly to our Fiscal Department at ZipBooksInvoice@northnetlibs.org.
Attachment T—Statistics Reporting Procedures

Zip Books Statistics Reporting Procedures

This is an overview of the statistics reporting procedures for all Zip Books libraries. The data provided will give us a better understanding of your library’s Zip Books program and will be used in our reports to the California State Library.

Monthly Reporting

1. The majority of Zip Books statistics reporting is now required only once a year and is captured during the month of April. However, libraries are still required to track two statistics each month: the running total of first-time Zip Books users and the number of Zip Books items added to the library collection that month.

2. The monthly statistics should be emailed to nuesca@northnetlibs.org by the 10th day of the following month. For example, April’s statistics should be submitted by May 10th. Deadlines may be adjusted due to holidays or reporting schedules, and notification will be provided via email.

3. Use the provided “Zip Books FY19-20 Reporting” Excel spreadsheet to compile your library’s statistics for the month. Only the information indicated in the “Monthly” tab is needed each month. The “April 2020 Statistics” tab is for capturing the supplemental statistics. Save file using the following format: LibraryName_MonthYear_STATS. For example, your April stats report would be named ZipLibraryName_April2019_STATS.


Annual Reporting

5. Libraries are no longer required to track staff time on a daily basis except in April when this data is required as part of the supplemental statistics. During the month of April only, library staff are requested to keep track of the time spent processing Zip Books requests. This includes any activities completed prior to the item being returned to the library but does not include cataloging and statistics reporting. If some cataloging is done before the item is returned, such as assigning a barcode or importing a bibliographic record, this can be included in your time reported.

6. Other supplemental statistics that should be tracked in the month of April include: the total number of Zip Books requests received that month (both approved and denied) and item format/genre information. This additional data should be reported with your monthly April
statistics to be submitted in May. A separate tab labeled “April 2020 Statistics” is included in the Excel spreadsheet for this data.

7. The “Zip Books FY19-20 Reporting” spreadsheet replaces all previous statistics reporting spreadsheets and the old “Patron Survey Tracking Worksheet”. Libraries are no longer required to distribute and compile patron satisfaction surveys.

8. Any comments or feedback received from patrons, such as those that normally would be captured in the patron satisfaction surveys, can be included at the end of the statistics spreadsheet. Library staff are also encouraged to provide feedback.

9. Note that individual libraries are responsible for developing and maintaining their own tool to internally track Zip Books. A sample spreadsheet is included under Attachment M in the “Getting Started with Zip Books” document (available at https://northnetlibs.org/zip-books/).

10. Additional surveys may be required in the future for grant reporting purposes. A pilot survey is currently being developed in cooperation with the State Library.
## Attachment U—Statistics Reporting Form

### Zip Books Monthly Statistics 2019 - 2020

**Library Name:**

**Date Service Launched (first year):**

**Month:**

1. Running total of first-time Zip Books customers served since launch:
2. Number of Zip Books added to library collection this month:
3. Comments/Feedback (optional):

---

Note: Additional statistics required during the month of April (see APRIL 2020 STATISTICS tab)
## Zip Books Monthly Statistics 2019 - 2020

**Library Name:** ZIP BOOK LIBRARY  
**Date Service Launched (first year):** October 2018  
**Month:** April

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Running total of first-time Zip Books customers served since launch:</td>
</tr>
<tr>
<td></td>
<td>Note: Additional statistics required during the month of April (see box below)</td>
</tr>
<tr>
<td>2</td>
<td>Number of Zip Books added to library collection this month:</td>
</tr>
<tr>
<td></td>
<td>Discarded titles given to other Zip Books libraries should be counted by the receiving library as added to library collection; count items added to the collection during the month whether or not it was purchased that month or a previous month</td>
</tr>
<tr>
<td>3</td>
<td>Comments/Feedback (optional):</td>
</tr>
<tr>
<td></td>
<td>Customer comment: “Our whole family is a fan of the Zip Books program!”</td>
</tr>
<tr>
<td></td>
<td>Include any comments or feedback from patrons and library staff regarding the Zip Books program, policies, procedures, etc.</td>
</tr>
</tbody>
</table>