



Best Practices Toolkit

FEBRUARY 2020

Policies

Procedures

**Marketing/
Management**

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Beaumont Library District
Brawley Public Library
Camarena Memorial Public Library
Corona Public Library
Harrison Memorial Library
Humboldt County Library
Imperial Public Library
Kern County Library
Kings County Library
Lake County Library
Mendocino County Library
Mono County Library
Ontario City Library

Palo Verde Valley Library District
Plumas County Library
Redwood City Public Library
Riverside Public Library
Sacramento Public Library
Salinas Public Library
San Luis Obispo City – County Library
Santa Barbara Public Library
Santa Maria Public Library
Siskiyou County Library
Ventura County Library
Yolo County Library

Best Practices Toolkit Working Group

This toolkit would not be possible without the help of the following Best Practices Toolkit Working Group members who shared their time, knowledge, and experience:

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INTRODUCTION

What is the Zip Books Project?

The Zip Books Project is an alternative model for interlibrary loan service that bridges the gaps between a library's patron request service, a normal acquisitions process, and an outreach/home delivery service.

It is based on the pilot project, “Zip Books—Digital Library of Northern California,” conducted by the Butte, Shasta and Humboldt County Libraries under a FY 2011/12 LSTA grant from the California State Library. The purpose was to identify and test efficient, cost-effective alternatives to traditional interlibrary loan delivery practices. One method tested was a “buy vs. borrow” model, where used books were ordered through Amazon, rather than requested through interlibrary loan, and shipped directly to patrons in good standing using the free Amazon Prime two-day delivery service whenever possible. Services were tracked, and the patrons were responsible for returning the books to the library when finished. The libraries would then decide whether to add the books to their collections or dispose of them in some other way (offering it to other Zip libraries, library book sale, etc.).

Zip Books is extremely popular with both libraries and patrons. It provides patrons with speedy access to materials they might not otherwise be able to get through the library, without the long wait often associated with traditional Interlibrary Loan (ILL) requests and local resource sharing systems like Link+. It is easy for library staff to administer. And since Amazon ships materials directly to the patron, it saves the effort and cost of packaging and mailing materials, or the need to require patrons to return to the library to pick up their requested materials. It adds a patron-driven collection development approach a library's usual process, resulting in a collection more closely attuned to the needs of the local community. And it exposes library staff to patrons and materials they might not otherwise encounter, improving their ability to market library services and serve their communities.

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What is the Best Practices Toolkit?

The Best Practices Toolkit is a resource designed to assist participating libraries in determining the best practices to implement in their local Zip Books program to promote sustainable growth and management.

The toolkit is organized into three sections: introduction, best practices, and supporting documents. Best practices are broken down into categories and were compiled from discussions and feedback received during the annual Zip Books General Meeting, quarterly Open Forums, and various other communications with libraries.

This toolkit was created with the overall goal of making Zip Books a more efficient and sustainable program. Additional information and resources can be found on the Zip Books website at: <https://northnetlibs.org/zip-books/>.



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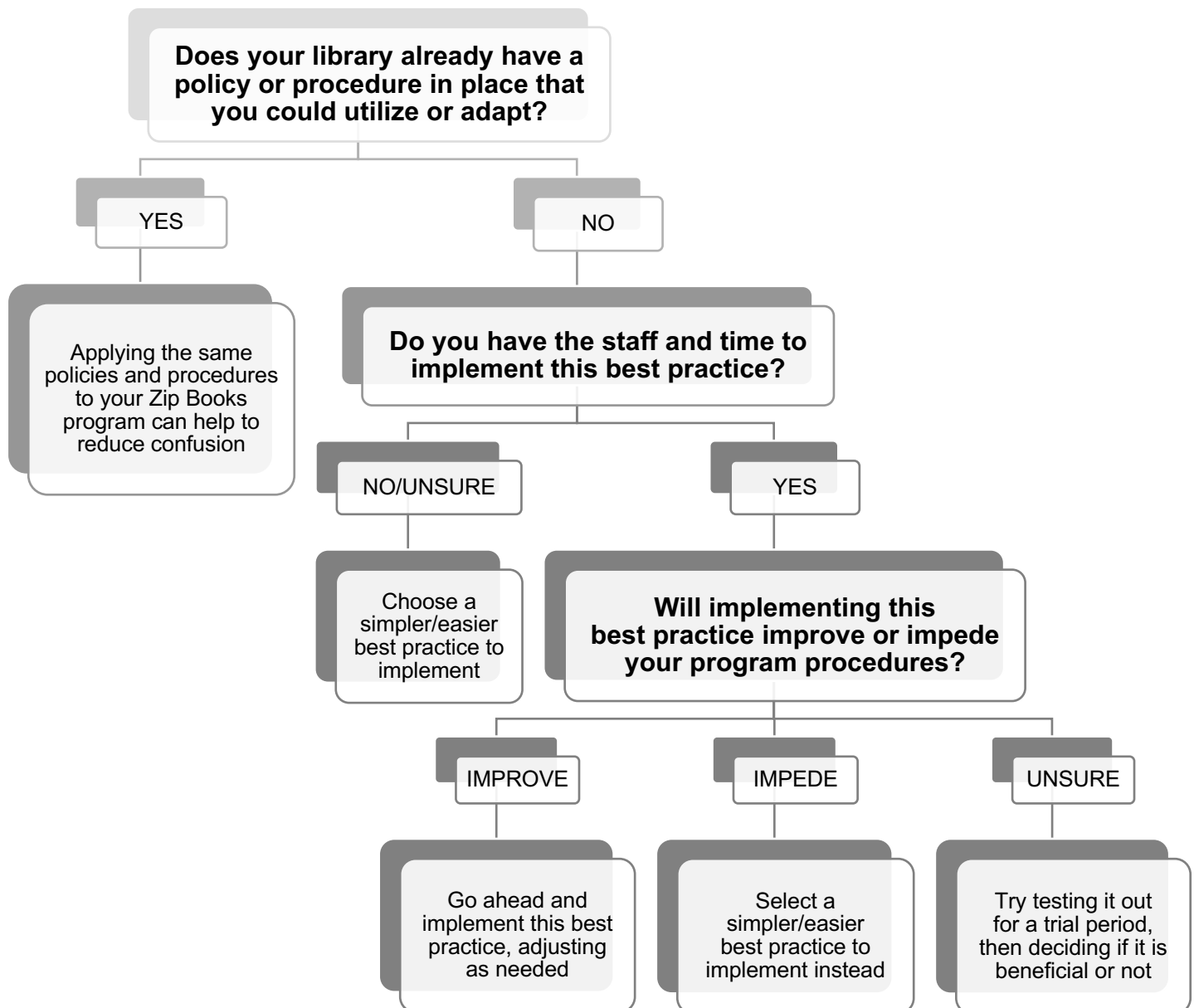
Photo courtesy of Christian Koszka, FreeTime Productions

Portions of this toolkit were pulled from the Onboarding Toolkit and expanded with input from the State Library, the Zip Books Advisory Committee, the Best Practices Working Group, and library staff from various participating Zip Books libraries.

While every effort has been made to provide a variety of best practices for the different types of libraries within the Zip Books program, local programs may need to make adjustments according to their own needs and resources. The Zip Books Project Coordinator is always available to assist and provide guidance, if needed.

Determining Best Practices for your Library

This flow chart provides some guidance on deciding which best practices to implement in your local Zip Books program. Some libraries may be able to implement many of the best practices, while others may need to pick and choose, taking into account their available resources, time, staffing, and more.



BEST PRACTICES

Organized by Category

This following section suggests some best practices for deciding and implementing local Zip Books policies, procedures, marketing, management and more.



Photo courtesy of Christian Koszka, FreeTime Productions

POLICIES

Given the diversity of the various participating libraries within the Zip Books project, NorthNet and the State Library recognize the need for individual library systems to establish their own program policies and procedures that take into account their own resources, needs, and existing protocols. It is one of the great features of the Zip Books program that your library has the flexibility to find the right balance that works for you. The policies shared below are best practices that have been used by participating libraries over the course of Zip Books history and are suggestions to help improve and streamline your local program.

Keep in mind that while libraries are given the flexibility to determine processes and policies that best suit their needs, there are certain policies that are set forth by NorthNet and the State Library, such as the type of materials that can be ordered using Zip Books funds. Review the “Zip Books Purchasing Policies” and “FAQ for Participating Zip Books Libraries” documents (both available online thru the Zip Books website at: <https://northnetlibs.org/zip-books/>) to ensure that your local policies and procedures abide by these established program rules. In cases where policies are unclear or when specific situations fall into a grey area, library staff are encouraged to reach out to the Zip Books Project Coordinator for clarification or guidance on program policies and procedures. However, if faced with a time sensitive issue, staff may make their own call, choosing a course of action that provides customer service.

It’s also important to note that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in program policies or reporting procedures, but other times these necessary modifications may come from your own internal assessments. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform your staff and patrons regarding any changes that might affect them. And as always, the Zip Books administrative team is available to provide assistance and guidance to your program as it continues to evolve and grow.

Patron Eligibility Best Practices

Good Standing

To ensure the program runs as intended, it is useful to establish who is eligible to participate. Zip Books project management requires that patrons be considered “in good standing”, but this may vary with each library. Suggested good standing requirements could include:

- Less than \$5.00 in outstanding charges
- No lost/outstanding/damaged Zip Books items
- Library card holder for your library jurisdiction
- Library card must be current with a verified address
- No past multiple violations of program policies and procedures

Over the course of the program, you may find that you will need to remind patrons of program policies and procedures, such as returning their Zip Books items to the front desk instead of the library drop box so that they are not mistaken for donations. A conversation on the correct protocol can be useful to correct future mistakes, but repeated infractions may require formal warnings and possibly a suspension from the program. Adding notes in a patron’s account or on your Zip Books tracking sheet will help you keep track of patrons who have abused the program or have had problems with returning items properly and in good condition, and can help you determine if they should lose their good standing, either temporarily or permanently.

As another option, your library could choose to establish a “trial period” for your first-time Zip Books patrons in which they are limited to only one request until the item is successfully returned to the library. After which, they might be granted full borrowing privileges depending on your local request limits. This might help to further ensure that your patrons fully comprehend the program policies and procedures so that there are fewer issues with lost or unreturned items.

Residence Limitations

While limiting Zip Books to registered borrowers is a good idea, you can also consider further limiting program participation to those that reside within your library jurisdiction. This is particularly useful in areas where you have other nearby Zip programs or when dealing with patrons who are visiting or just passing through the area. For example, if your library is part of a larger consortium, you may choose to limit program usage to cardholders within your jurisdiction to allow your grant funds to stretch further. This limitation may already be automatic in your system if it is standard protocol to not issue full-access cards to non-residents.

One of the major benefits of the Zip Books program is the fact that requests are later added to a library collection, so it is important that items are actually returned to the library from which they are requested. Limiting requests to local residents not only helps to ensure items are returned, but that grant funds are being used to address your own community's reading and information needs and interests. You are welcome to refer patrons that do not reside in your jurisdiction to the Zip Books Library map, available through the Zip Books website (<https://northnetlibs.org/zip-books/>), to find a program in their area.

Alternatively, other libraries might find it easier to not set any limitations on residency at all, saving their staff time from having to check. This is also acceptable and could serve to play a part in their library's overall goal of promoting "universal borrowing" and "resource sharing". Whether or not you decide to set a residence policy for your Zip Books program, it is good to know that this remains an option for your library. It's just a matter of weighing the pros against the cons and determining what works best for you folks.



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Other Restrictions

The Zip Books program allows another level of customer service for your library patrons, so it would seem counterintuitive to set restrictions regarding patron eligibility. However, given that this is a grant program funded by the State Library, there are certain situations that do require such limitations in order to ensure that grant requirements are adhered. Here are some other usage requirements to keep in mind should the situation arise:

- Zip Books requests should only be shipped to California addresses or PO Boxes
- "Snowbirds", patrons who reside in your jurisdiction for only part of the year, may participate in the Zip Books program while they are in your jurisdiction, but cannot request that items be shipped to them when they no longer reside in your area
- Library staff are allowed to request Zip Books so long as they are intended for personal use and limited to a maximum of two items per month
- Requests must be made using a staff member's personal account and cannot be placed through library accounts, such as story time accounts, as this is not considered a "patron-driven" request

Request Limits Best Practices

Item Limits

The “Zip Books Purchasing Policies”, available in the Supporting Documents section as **Attachment A**, states that libraries should monitor the number of Zip Books requested by a patron at any one time and may determine the maximum number, with a maximum allowable of five items per customer per month. Furthermore, libraries may choose to allow patrons their maximum allowable items all at once or limit them to one item at a time. Some suggested item limits include:

- One active Zip Books request for first-time users, then only allowing them their maximum allowed limit once the item has been successfully returned
- No more than three active Zip Books requests at the same time
- Patron must return Zip Books items before they are able to request additional items, whether or not it is a new month
- Patrons can be allowed to request their maximum allowable items all at once by special request for unique circumstances, such as to assist with completing a school project

When determining the item limits for your program, libraries should consider their available Zip Books funds and their staff’s ability to process requests on a regular basis. If you are a small library with limited staffing and funding, then it may not be feasible to accommodate a large influx of requests so limiting patrons to one or two requests a month would be more manageable in the long run. However, if you’re a library that is looking to grow its program usage and have the staffing available to process requests on a regular basis, then allowing the maximum allotment of five Zip Books requests a month might be a good idea.

While it is useful to be consistent in setting your item limits or any other policy, occasionally you may find a need to adjust your policies due to funding or program usage. Most patrons are understanding about such changes and are grateful to still have the service available to them. Still, it is good practice to keep changes to a minimum and to inform both staff and patrons of any modifications, as well as the reasons for them, to help minimize any confusion or conflict.

Item Expenditure Caps

The expenditure cap for individual Zip Books items has been set by NorthNet and the State Library at \$75 pre-tax for audiobooks and foreign-language items, and \$50 pre-tax for all other eligible Zip Books items. This raised cap has allowed for more titles to be eligible for purchase through the program, and many libraries have cited this policy change as one of the main

reasons for their program growth. Nevertheless, your library may still occasionally receive requests for more expensive items, such as textbooks or out-of-print titles. In these instances, library staff may request exemptions to the expenditure cap by emailing the Zip Books Coordinator for approval PRIOR to purchase. However, it is useful to consider whether or not the request is worth the additional expense. For example, if the item is a textbook, you will want to make sure that the subject is of general interest to the public and that you intend to add it to your library collection. Or perhaps if it is an out-of-print item that you do not intend to add to your collection, then it may be better use of your time and funds to acquire the item another way, such as through traditional Interlibrary Loan (ILL) or local resource sharing systems like Link+.

Household Caps

An additional expenditure cap that can be implemented to help your library stay within its Zip Books budget is a household cap. While we do allow and encourage families to participate in the program, costs can add up if multiple members are requesting their maximum allotment of requests each month, resulting in a large portion of funds being spent on just one household. If this is a concern for your library, you may consider setting some sort of household cap on the total cost of items they request. For example, Riverside Public Library has chosen to limit the maximum of Zip Books orders per household per month to \$200. The benefit for them is that this policy only affects a small number of families that are frequent users so it does not impact a large number of patrons and is not too difficult to track.

Alternatively, this policy can also be applied to individuals who are known to request multiple items at the same time or who tend to request items of higher cost, such as audiobooks. Whether or not your library chooses to set such a policy, it's important to remember that this is only effective if tracked on an ongoing basis. This may require some changes in staff procedures and updates to your program tracking tool that would allow staff to easily keep track of these "problem" households/individuals and their monthly spending.

Foreign Publishers

The benefit of using the Amazon platform to fulfill Zip Books requests is the wide variety of titles available through their website, including items from foreign publishers that you may not normally find in your local bookstore. Although there is no set policy against ordering items from foreign publishers, some libraries have encountered issues when ordering certain titles that have future US publication dates. For example, at Sacramento Public Library they found that popular items that break US street date will cause long waitlists which they are unable to sustain and that go against their library's preferred ratios. As a result, their selectors are hesitant to add these Zip

Books items to their library collection when they are returned. In cases such as these, limiting requests for items from foreign publishers that have a pending publication date in the US, may be a good solution to address the various issues that may arise and to save your program time and money.

Recent Publication Dates

Another policy stated in the “Zip Books Purchasing Policies” (see **Attachment A**) indicates that adult fiction best sellers are not eligible for purchase using Zip Books funds, unless purchased in alternative formats (large-print or audiobook). However, non-fiction best sellers, young adult/children’s best sellers, and best sellers no longer on the New York Times Best Seller list are okay to purchase. Keeping track of which best sellers are acceptable and which are not can be confusing, so libraries have chosen to establish a policy limiting publication dates. For example, at Humboldt County Library they do not order Zip requests for items that have been published in the last 12 months. This not only helps them to avoid the current NYT best sellers but also cuts down on accidental duplication of orders. Instead, they will forward any Zip Books requests for new publications as a purchase suggestion and recommend that the library order the item using their own funds instead.

Other Request Limits

Some libraries have found it useful to establish other limits to the types of Zip Books requests they are able to fulfill, depending on their own library system’s policies and protocols. Other request limits include:

- Items without a bibliographic record available on OCLC, except items from local author. For libraries that check out Zip requests to a patron’s library account, like Lake County Library, this saves them on cataloging time and also helps to weed out some of the requests for self-published materials, which normally wouldn’t be added to the library collection anyway.
- Items in select formats, such as: pop-ups and spiral-bound books, that would automatically not be added to the library
- Non-general test-prep books for niche subjects
- Items that have not yet been published, which not only eliminates any best seller requests but also helps staff to avoid dealing with pending requests
- “Author cap” for patrons who have requested titles by the same author more than six times in a 12-month period

Lending Periods Best Practices

Item Due Dates

Whether or not your library checks out Zip Book items to the patron's account, it's a good idea to establish a due date for items to be returned. While it is possible for libraries to set no due date, thus allowing their patrons to utilize their request for as long as needed, this can result in items not being returned or a low number of items that can be added to your library collection.

Therefore, it is recommended that some sort of deadline be established even if checking out items to a patron's account is not a part of your normal Zip procedures. Possible suggested borrowing periods include:

- Same borrowing period as regular library items
- Slightly extended borrowing period for Zip Books requests, such as 30 days or six weeks
- Extended borrowing period not exceeding 6 months

Item Renewals

Providing patrons with the opportunity to renew their Zip Books request is dependent on whether or not your library chooses to create a temporary bibliographic record for the item and check it out on a patron's library account at the time of ordering. See the section on "Cataloging Best Practices" for additional information. For those libraries that choose not take this extra step, renewals are moot, but for those that do have the option, it's good to also have a set policy on whether or not renewals are allowed and how many a patron may have before the item is considered "outstanding". For example, you might establish one of these following policies:



Photo courtesy of Christian Koszka, FreeTime Productions

- No renewals for Zip Books items. This can be prevented when creating the item bib record or by simply putting a hold yourself on the item so that it can be held for further end processing when returned.
- Only one renewal allowed before the item must be returned
- The same number of renewals as regular library items

Fines and Fees Best Practices

Program Fees

Part of the appeal of the Zip Books program is that it is a free and convenient service that provides patrons with another means to acquire the items they want/need without any cost to them. However, Zip Books Project Management does understand that the program does require time and labor to implement. To help offset this added burden, libraries are allowed to charge patrons to use the service, much as they would with traditional Interlibrary Loan (ILL) requests. However, it is recommended that the fee be nominal and not exceed the cost of an ILL request as Zip Books is intended to be a cheaper and quicker alternative to ILL.

Item Fines

Whether your library chooses to charge a nominal fee for requesting a Zip Book or allows patrons to utilize the program free of charge, the occasion may arise where you need to fine the patron for a lost or damaged item, or for an item that was incorrectly returned to the library book drop and processed as a donation. Each library should determine their policy on handling these hopefully rare situations. If your library already has established policies and procedures regarding damaged or unreturned items, you could choose to apply the same rules to your Zip Books program or adapt them for your needs. For example, Riverside Public Library will not charge a patron for the first offense, but will charge them for the price of the book for any subsequent lost or damaged items will. Although item prices may change on Amazon, libraries should charge patrons the same amount paid by the library for the item at the time of the initial order.

Other Fines and Fees

Should a library choose not to add a Zip Books item to their collection, you may also give patrons the option to purchase their request. Mendocino County Library allows their patrons to indicate their interest in doing so, as shown in their Zip Books Return form (see **Attachment K**). As with other item fines, the price charged should be the exact amount paid by the library at the time of purchasing. The funds received should then be put back into your library's collection development budget towards purchasing more materials.

PROCEDURES

As many libraries have expressed, one of the great features of the Zip Books program is that your library has the flexibility to adapt program policies and procedures to find the right balance that works for you. The procedures shared below are best practices that have been used by participating libraries over the course of Zip Books history and are suggestions to help improve and streamline your local program.

Remember that there are certain procedures set forth by NorthNet and the State Library, such as the program statistics that must be reported each month. Review program documents like the “Zip Books Purchasing Policies”, “FAQ for Participating Zip Books Libraries”, and “Onboarding Toolkit” (available online thru the Zip Books website at: <https://northnetlibs.org/zip-books/>) to ensure that your local policies and procedures abide by these established program rules. In cases where procedures are unclear or when specific situations fall into a grey area, library staff are encouraged to reach out to the Zip Books Project Coordinator for clarification or guidance on program policies and procedures. However, if faced with a time sensitive issue, staff may make their own call, choosing a course of action that provides customer service.

It’s also important to note that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in program policies or reporting procedures, but other times these necessary modifications may come from your own internal assessments. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform your staff and patrons regarding any changes that might affect them. And as always, the Zip Books administrative team is available to provide assistance and guidance to your program as it continues to evolve and grow.

Request Processing Best Practices

Request Forms

Your patrons need a way to submit their Zip Books requests and we recommend providing both a paper and online request form in order to meet the various needs of your patrons. You could consider using your library's existing "Purchase Suggestion" form and augmenting it to field Zip Books requests as well, just as Ventura County has done: <https://www.vencolibrary.org/library-catalog/tell-us-what-buy-suggest-purchase>. You could even adapt your regular Interlibrary Loan Request form to also include Zip Books, like Mendocino County Library: <https://www.mendolibrary.org/books-materials/ill-zip-books/zip-book-or-standard-2-00-interlibrary-loan-request>. Both are useful ways to jumpstart your Zip Books program utilizing elements you might already have in place, especially if they are well-used and already familiar to your patrons.

Alternatively, you could also choose to keep your request form internal and create a guided form that must be completed by library staff, ensuring that necessary elements and procedures are met. Such as in the case with Santa Barbara Public Library: <https://bit.ly/2ZsWQtb>. This allows patrons to submit their requests in-person, by phone, or by email.

Sample print request forms are available in the Supporting Documents section (see **Attachment B**). Note that elements are built in to ensure that the request meets program policies and that procedures are explained to patrons, such as the fact that the item ships directly to them from Amazon to their home and that they're responsible for returning the item directly to a library staff member.

Sample online request forms are also 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>. You could consider further enhancing your request form by making it bilingual, just as San Rafael Public Library has done (<http://srpubliclibrary.org/booklovers/zip-books/zip-books-order-form/>), as a way to reach out to their Spanish-speaking patrons.

Checking Records

For many libraries, the next step in processing a Zip Books request is making sure that the item isn't already owned by your library. Some patrons will have already done this, but it's still a good habit to check your Online Public Access Catalog (OPAC), Integrated Library System (ILS), or Library Management System (LNM) to make sure the item isn't readily available in your library

system. Don't forget that items available to patrons through a shared system can still be ordered with Zip Books funds if not personally owned by your individual library jurisdiction. For example, Lompoc Public Library has access to materials through the Black Gold Cooperative Library System, but if an item is not available in either one of their two branches it is an eligible Zip Books request. However, this does not apply to individual branches within large systems like Riverside County Library System or Stanislaus County Library. Since they are considered one large library jurisdiction and not a consortium of individual systems, then items available in their catalog are considered "owned by the library" even if it is not available at the specific branch where it was requested. This allows for less duplication of titles and helps to ensure that grant funds are being used to acquire items not normally available to patrons.

Also, as previously mentioned, Zip Books project management requires that patrons be considered "in good standing" in order to participate in the program. Libraries are given the freedom to determine what constitutes as "good standing" and to decide how best to keep track of who has lost their good standing. Perhaps you maintain a short list in your program tracking tool of patrons who have had past infractions, such as losing their Zip Books item or returning it damaged. Or perhaps you also utilize your ILS to make similar notes in a patron's library account. Whether you use your tracking tool or ILS, it's good practice to check both places before you process a patron's request to make sure they are still eligible to participate in the Zip Books program and have no outstanding fines or Zip items. Likewise, you'll want to make sure that the patron has not exceeded their maximum allotment of active Zip requests as set forth by your library.

In the "Zip Books Flowchart" created by Lake County Library (see **Attachment C**), you'll see these are the first steps completed when processing a Zip Books request, which helps them to prevent unnecessary work for ineligible items or patrons. You will also see this in the sample staff procedures from Kings County Library, Lake County Library, and Mendocino County Library as shown in the Supporting Documents section of this toolkit (see **Attachment D**).

Amazon Ordering

Currently, all Zip Books ordering is processed through the Amazon website via a Zip Books dedicated Amazon account set up by each individual library jurisdiction, with all orders being billed to an Amazon Corporate Credit Line (ACCL) or NorthNet Credit Card that is paid for using grant funds. Most library staff will have some familiarity with Amazon, but staff instructions may be developed to give step-by-step guidance on how to order an item, including how to place gift notes for patrons that explain how to return the item. An example of such a document is available from Redwood City Public Library in **Attachment E** of the Supporting Documents section. 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.

Although ordering from Amazon is fairly straightforward, there are a couple of tricks that libraries have employed in order to help streamline the process. This is especially helpful for bigger programs that may need to process requests multiple times a week in order to keep up with the demand. One such trick for libraries that allow patrons to have more than one Zip Books request at the same time, is bundling orders together. Since the items are going to the same person and the same address, you can save yourself some time by placing one large order with multiple titles instead of having to complete multiple orders for each item. Amazon also gives you an option to place an order for items going to different addresses, but this can cause issues if you're not careful and some possible confusion if they have different delivery dates. Still, it is an available option in the checkout process when you choose a shipping address. Simply click on "Change" Shipping Address and look for the option that asks: "Shipping to more than one address?", then select where to send each item.

Another form of order bundling you can do is to order boxed sets. This is especially useful when ordering items that are part of a children's series. If a title requested is part of a larger series that is not owned by your library, but that you anticipate would be a good addition to your collection, you may want to consider purchasing a boxed set if available. This not only will save you money in the long run, as boxed sets usually cost less than ordering the titles individually, but it may also save you time and effort.

Shipping Options

When placing orders, you should take advantage of the Amazon Prime free two-day shipping option whenever possible. This shipping option is one of the main reasons Zip Books ordering is processed through Amazon as it allows libraries to get requests into patrons' hands quickly and affordably. If the free two-day shipping option is not available, which sometimes is the case with items ordered from third-party vendors, then you should select standard shipping instead of expedited shipping in order to keep costs minimum.

Generally, orders should also be shipped directly to the customer from Amazon and not to the library first, to further cut down the time it takes for a patron to receive their request. However, there may be instances where it is in the best interest of the patron to ship items to a library branch instead, and in these cases exceptions may be made. For instance, if package theft is a concern in the area where the patron resides or past orders have claimed to be delivered but not received by the patron, then you might arrange to have the patron pick up their request at their

local branch library. This may also be necessary in some rural areas where the post office does not deliver to a person's home address. In Palo Verde Valley Library District where they serve an influx of "snow birds" during the Winter months, many of whom live in a RV with no physical mailing address, sending requests to the library is their only option. Other shipping options include: PO Boxes, General Delivery (to local Post Office locations), and Amazon Locker.

Should your library decide to ship any Zip orders to a branch library, it is good practice to include some sort of indication on the shipping label that would identify this as a Zip Books request. This not only ensures that items don't get lost in the shuffle, but also prevents raising any red flags when NorthNet's Fiscal Department reviews your monthly reports. Libraries have used identifiers such as:

- Patron Name – ZIP
- Staff Name – Zip Books Department
- Library Branch Name – ATTN: Zip Books
- Brawley P1001246 (utilizing the patron's library card number to maintain their privacy)

Keep in mind that Zip Books requests should only be shipped to California addresses or PO Boxes. "Snowbirds" or patrons who reside in your jurisdiction for only part of the year may participate in the Zip Books program while they are in your jurisdiction, but cannot request that items be shipped to them when they no longer reside in your area.

Undelivered Items

As mentioned above, occasionally Zip Books requests are not received by a patron, possibly because of theft, an incorrect address, or it simply gets lost somewhere in the process of being delivered. Many libraries have a policy of allowing one first offense and reordering the requested item without issue. However, should it happen again with the same patron, staff are encouraged to arrange for future Zip Books requests to be delivered to a different address. For example, you might ask if there is another residence or a work address that you could ship to, or you could require that they pick up their requests at their local library branch. And as discussed in the section about "Fines and Fees Best Practices", libraries are welcome to charge patrons the cost for undelivered items once they have used their "first free" or "one courtesy item" allotment. If possible, staff can also look into requesting a refund for the item from Amazon. However, if the item was confirmed to be delivered or was sent to the wrong address, then this may not be possible.

In order to prevent any future orders from being unnecessarily lost, it is recommended that libraries keep track of all the instances this happens so that they can monitor for trends or repeat offenders. This can be done in your program tracking tool, ILS, or both. And of course, libraries have the freedom to revoke a patron's good standing at any point and bar them from the Zip Books program, whether temporarily or permanently.

Patron Notifications Best Practices

Request Status

Many patrons find it useful to know that their Zip Books request was received and processed so they can keep an eye out for their request in the mail. Some participating libraries send an email to patrons notifying them that library staff have ordered a Zip Book for them, along with instructions on when the item is due and how to return it when done. For example, you may want to explicitly tell patrons to return their Zip Books items to a staff member at the circulation desk so that it is not left in the library drop box where it can be confused for a book donation. You can also choose to provide patrons with the tracking information for their order so they know exactly when to expect their item, and any other updates regarding their request.

Besides emails, staff will also create an Amazon gift message for the patron when ordering the book and include information like the item barcode, just as Lake County Library does (see **Attachment F**). Note that items purchased from other Amazon sellers will not have an option to include a gift slip/message so information will need to be dispersed through other means. Some libraries have also used their existing ILS to provide friendly reminders to patrons regarding outstanding Zip items.

For some libraries, providing notifications to patrons can be too difficult because their library processes a lot of requests or it is too time consuming a process. Even if you choose not to do this as part of your normal procedures, a basic message notifying the patron that their request was received and providing them with an average processing time can be extremely helpful and much appreciated by patrons. Turnaround periods can be as little as 4 days or a week, or as much as 2 – 4 weeks depending on the popularity of the program. This is a good practice to employ, especially if there are any issues with their request, like if their request is denied, delayed, or was ordered through other means.

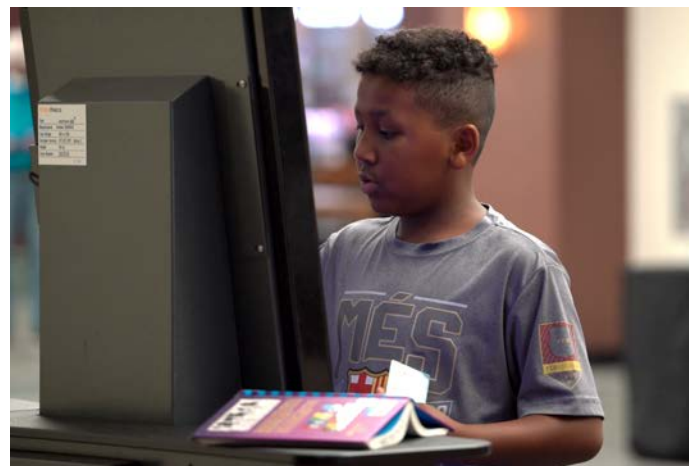


Photo courtesy of Christian Koszka, FreeTime Productions

Besides following up with patrons at the beginning of the request process, you may also need to reach out to them at the end of the process when their Zip items are due or have been out for a long time. Not only will patrons welcome the reminder, but it may also help you catch items that may have incorrectly been returned through your library's book drop.

Form Messages

Whatever means of communication that you use, having a uniform response or set language can help your staff save time in the long run, while keeping patrons in the loop. Many libraries suggest creating template messages that can be copy and pasted, and used for various situations and formats, whether it is mailed through the post office, emailed, or sent by automatic phone message. The same would also apply to the gift messages that can included with certain Amazon orders, not including those from third-party vendors.

Other sample email and gift message wording is shown in **Attachment F** in Supporting Documents. For patrons that do not have email, Lake County also developed print notices that are sent via USPS, including a notification for overdue Zip Books items that includes a picture of the item cover to help patrons identify the missing material.

Tracking Best Practices

Tracking Tool

As part of the program requirements, libraries are required to develop a tool to internally track Zip Books items and keep record of all your program orders and activities. Many libraries use an Excel spreadsheet, but other platform suggestions include SharePoint, Google Sheets, and Microsoft Access. Some libraries prefer an “old school” method instead and will maintain Zip Books file folders or binders. Whatever method used, this tool will be what your team will use to track a Zip Books request from when it is placed and when the item is returned to the library. Information included in your tracking tool could consist of:

- Patron name and contact info, including shipping information. At Kern County Library, they choose to indicate their library card or borrower number instead
- Library branch where requested
- Book title, author, and format
- Item cost
- Genre type or collection (e.g. Children’s, Adult Non-Fiction, Mystery, etc.)
- Date requested, date ordered, and date due
- Order status (e.g. ordered, returned, etc.)
- Item added or not added to library collection
- Comments and notes, including why an item was not ordered, if an item had to be reordered, or if there have been past issues with this patron

Your Zip Books tracking tool can also be used to continuously track program spending so that your team is always aware of the amount of funds available for requests. Likewise, it can be used to help your staff gather statistical data that your library will be required to report on a regular basis. With so many elements being tracked, it may be useful to create and utilize a shorthand or color coded system for notes, such as indicating “Billed” for items that were billed to a patron account or highlighting items in yellow that have any issues, like if an item is backordered.

An example of a simple tracking spreadsheet is included in **Attachment G**. Other libraries have also designed more complicated spreadsheets or created an Access database to track their Zip Books orders. The complexity of your tracking tool will depend on your own program needs. You may find that as your program grows so must your tracking tool. However, you’ll want to keep in mind the staff time and labor required to input information and maintain the overall system, and try to limit data entry to only what is required. A fine-tuned tracking system will have everything needed to track a request without any redundant information. Additional examples of internal

tracking tools created and used by libraries will be made available on the Zip Books website at: <https://northnetlibs.org/zip-books/>.

Statistics

Statistical reporting is required on a regular basis in order to provide monthly data to the State Library to help showcase the growth and value of our program. Efforts have been made to keep statistics reporting to a minimum so there are only two questions that need to be reported each month: a running total of first-time Zip Books customers served since launch (each person is counted only once no matter the number of times they request items) and the number of Zip Books added to your library collection during the reporting month (including those discard items received from



Photo courtesy of Christian Koszka, FreeTime Productions

other libraries). Additional room is provided for staff to include their own comments or to share feedback received from patrons. While it is optional, any feedback received is helpful and is sometimes shared with the State Library. Additionally, supplemental statistics are gathered during the month of April in order to provide Program Administration with additional information and data on each Zip Book library. Only three additional questions are asked: the number of Zip Books requests received, the types of requests received (such as format and genre type), and the total staff time for Zip Books request processing. For complete instructions, review the “Zip Books Statistics Reporting Procedures” document and forms, included in the Supporting Documents section as **Attachment H, I, and J** or available on the Zip Books website at: <https://northnetlibs.org/zip-books/>.

While these statistics should not take too much of your staff’s time to track, we recommend building these questions into your regular program tracking tool so that the information can be more easily gathered. This will not only save your staff time and effort by lessening the time spent on program reporting, but it also creates a one-stop-shop for all your Zip Books tracking needs, including requests, budgeting, and statistics. Alternatively, you might find it easier to keep track of the number of unique users by creating a separate Excel spreadsheet with just patron names. This allows you to filter names alphabetically to quickly determine if a patron is a first-time user or not and can also be used to help maintain your Amazon address book should you need to purge any names.

To make your monthly reporting even easier, you can also choose to use the same statistics reporting form each month, adding a new column as you go for each new month. This helps to simplify your files and provides both your staff and NorthNet a quick view of your program's growth throughout the fiscal year.

Integrated Library System

On top of utilizing your Zip Books tracking tool, staff are also encouraged to make use of your existing integrated library system or library management system to help with your program tracking, whether it is Horizon, Sierra, Koha, or some other system. For example, adding notes in a patron's account will help your staff keep track of patrons who have abused the program or have had problems with returning items properly or in good condition. This can help you determine if they should lose their good standing, either temporarily or permanently, and whether or not to process their requests. It also provides an easy means for you to place a fine on a patron's account for items that were damaged or lost. Notes in patrons' accounts can also be used to set "friendly reminders" for patrons regarding any outstanding Zip items.

And you're not just limited to adding notes to a patron's account. You can also add notes to the note field of an item's bibliographic record, allowing you to quickly identify all the Zip items in your library catalog. Libraries may find this useful in helping to build Zip Books displays or in gathering their own circulation statistics for Zip Books items.

END PROCESSING

Depending on the popularity of your Zip Books program, libraries usually process requests on a weekly basis. Some choose only to process requests once or twice a week, while others have to process requests daily in order to keep up with the demand. Conversely, processing Zip Books requests once they are returned to the library may not always be done on a regular basis, either because cataloging is done in bulk or because a library's lending period means items are not being returned regularly. Whatever the case may be, many libraries report that the bulk of the time spent working on the Zip Books program is spent on the end processing portion because of the various aspects involved. For instance, when a patron returns a Zip Book item, library staff must first decide whether to add it to their library collection according to their normal selection process. Items added to the collection must then be cataloged and processed like any other library book, with additional steps for those that choose to add any Zip Books labels. If a library chooses not to add an item to their collection, the item must first be offered to other Zip Books libraries via the listserv or offered to other participating libraries within their consortium. Any items "claimed" by fellow Zip libraries are then prepared for shipment. And lastly, if an item still remains unclaimed, it is then donated to the Friends of the Library for resale or discarded by other means.

Each individual step takes time and effort, which can quickly add up if your program is processing many items a month. The policies and procedures shared below are best practices that have been implemented by participating libraries over the course of Zip Books history and are suggestions to help improve and streamline your end processing procedures.

Keep in mind that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in policies regarding discards, but other times these necessary modifications may come from your own internal assessments. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform your staff regarding any changes that might affect them.

Selection Best Practices

Designated Selector

One of the most important things that libraries must first ask themselves when establishing their End Processing procedures, is determining who will decide whether or not a Zip Books item is added into your library's collection. Will it be the responsibility of the Zip Books coordinator and staff who also determine what requests to process? Or will the returned Zip items be forwarded to the library's Selection and Collection Development librarians to make the call themselves? Or perhaps both will decide, with each party having a say in what items they think are appropriate for the collection or not? Some libraries find it easier to simply follow the selection process that is already in place in their system, while others would prefer to keep the grant program separate from its normal procedures. Whatever process works best for your library, it's important to make a clear designation of who the selector or selectors will be in order to eliminate any confusion and help to streamline the process. To further streamline the process, Mendocino County developed a form for staff that flags a returned Zip Book (see **Attachment K**).

Determine Suitability

Once a selector or selectors are appointed, it's their job to determine the suitability of all Zip Books items. However, it is possible for this to be determined during different phases of the process. If the selector is also the Zip Books coordinator, then the suitability of a request might be determined at the beginning of the process, PRIOR to ordering it. This could depend on the title or type of materials requested, or the amount of funds available to your program. For example, the "Zip Books Purchasing Policies" (see **Attachment A**) asks that libraries exercise judgement when ordering items such as textbooks and study guides, or items of higher cost. So the selector should make sure that any requests for textbooks are general enough in nature to appeal to a broad audience and appropriate for inclusion into your collection before using your grant funds to order them.

If the selector is the collection development librarian, then perhaps the suitability is only determined once the items are returned to the library. Many libraries find this to be the most convenient option as it allows them to save time during the requesting process and helps patrons to receive their items quicker.

Alternatively, your library might also decide to simply add all returned Zip Books items to your library collection, eliminating any need to make decisions on suitability. This may be the case for small libraries that do not have the staffing or time to pick and choose items. And if items are being weeded from the collection at a later date, then it helps to further streamline the process for them.

No matter when this is done, it is important that the final status of a Zip Books request/item be noted as the California State Library does require libraries to track the total number of Zip items added to a library collection each month. As discussed in the “Statistics” portion of the Tracking Best Practices, it is recommended that the status of an item might be noted in your Zip Books tracking tool, but a monthly tally sheet can also be used.

Review Rejections

Another useful practice that libraries have built into their End Processing procedures is having another staff member review the list of rejected items not selected for inclusion into the collection. This allows for a second opinion and a chance to catch any possibly useful materials before they are shared with other libraries or given to the Friends of the Library. Perhaps this is another collection development librarian, or maybe it's your manager or county librarian that is given the last say on whether or not an item is appropriate for your library collection.

Cataloging Best Practices

Temporary Bibliographic Records

When a Zip Books request is received by a patron, it arrives from Amazon without any of the usual features that identify it as a library item, such as a barcode, call number, or library stamp. This can cause some confusion if the patron was not notified to expect their request in the mail and may result in the item not being returned properly. Besides sending patrons notifications indicating the proper returning procedures, another practice that libraries have chosen to implement in order to address this issue is to create a temporary bibliographic record at the time of ordering. Some libraries will assign the item a barcode, while others will simply use the item ISBN number. With a temporary bib record, staff can then checkout the item to the patron so that it shows up in their library account with a set due date. This in turn also gives other patrons the opportunity to place a request on the item as it will appear in the online catalog. Knowing that there is interest in a Zip item can also aid your staff in streamlining the cataloging process in order to get the item out and circulating as quickly as possible. Furthermore, by adding “Zip Books” to the note field of the bib record, staff can more easily search for Zip items that have been ordered and not yet returned. Both Lake County Library and Mendocino County Library include these steps in their sample staff procedures (see **Attachment D**).

Other libraries might find this process too time consuming for them so might choose to save time on processing by postponing any cataloging until after the item is returned and then maybe only doing the minimum necessary to add it to your collection. It is up to your library to find the right balance that works for you or perhaps lean on your existing cataloging procedures.

Zip Books Bookplate

If a Zip books item is selected for your library collection, it will need the usual stamps and library labels before it can be put on your shelf. For your convenience, Zip Books provides a bookplate sticker that can be applied to the front of the item indicating it was purchased through the Zip Books grant program. This not only helps to identify it as a Zip item, but also serves as a marketing tool. Although it is not required to use the provided bookplate, it is recommended. However, several libraries



Photo courtesy of Christian Koszka, FreeTime Productions

have chosen to only add the bookplate to certain items (just books), or will use and create their own bookplate, while others have eliminated this step altogether in order to save time and get items on the shelves quicker. An example of a mini bookplate created by Lake County Library is shown in **Attachment R** in the Supporting Documents section. An adapted bookplate such as this one can be added to audiobooks or any items that do not have the space to accommodate a regular-sized bookplate.

An initial stock of bookplates and other marketing materials is sent to all libraries when they first join the Zip Books program, however, additional stock can be requested as needed. To request additional or replacement stock, all you need to do is send an email to Jacquie Brinkley, the Zip Books Project Manager, at brinkley@plpinfo.org indicating the amount of materials needed. Materials are sent directly from the printers so libraries are asked to check their full stock to see if any additional materials will be needed in the following months. A copy of this bookplate is shown in **Attachment Q** in Supporting Documents. Digital files of this and other marketing materials can also be downloaded from the Zip Books website at: <https://northnetlibs.org/zip-books/>.

Zip Books Sticker

In addition to the bookplate, some libraries also choose to create a ZIP sticker that is applied to the spine of the item. This is the same idea as applying a YA sticker on Young Adult items. The benefit of doing this is that patrons can quickly identify Zip items while browsing the shelves. Both are optional and it is up to your library to decide whether or not to include them.



Photo courtesy of Christian Koszka, FreeTime Productions

Zip Books Discards Best Practices

Sharing Discards

While we hope that a large percentage of Zip Books requests later become a part of a library's collection, sometimes the materials are returned in poor condition or it turns out the title is not an appropriate match for your collection. These Zip Books discards should first be offered to other participating Zip Books libraries prior to donating it to your Friends of the Library for resale. Compiling, sharing, and mailing out your Zip Books discards does require some time and effort, so to help save on labor and shipping costs, libraries are also welcome to share Zip Books discards with other participating libraries within their consortium instead of making them available to all libraries, allowing you to take advantage of your local shipping resources. A list of participating Zip Books libraries by cooperative library system can be found in **Attachment L**. Items deemed too damaged for inclusion into a library collection, such as water-damaged books, do not need to be offered to other libraries and can instead be donated/discarded according to staff discretion. Additional time can also be saved by simply ensuring that the items purchased with Zip Books funds are appropriate enough to be added to your library collection, reducing the overall number of discards.

A library's list of unwanted Zip Books items can be shared with other Zip Books libraries simply by sending an email to the program listserv at: ZIPBOOKS@LISTSERV.PLPINFO.ORG. Examples of discard lists are shared in **Attachment M**. In the first example, an Excel spreadsheet is used to list the unwanted titles, but other libraries have shared their discard lists by using the Amazon Wish List feature and sharing the link, such as in the second example. Alternatively, if your discard list is short, you could choose to simply paste or input the list into the body of their email. No matter the format used, you'll want to make sure you provide the item information along with any instructions, such as:

- Item title and author
- ISBN #
- Publication date
- Type of binding and format
- Item condition
- Other item notes
- Who to contact if interested in an item and how to get in contact (phone, email, etc.)
- What contact information is needed (name, shipping address, etc.)
- The deadline to notify your interest in an item

Editing Discards

Whoever your library appoints as the selector, it is useful for them to rely on your existing collection development policies to determine whether a Zip Books item should be added to your collection or discarded. Likewise, your library might also lean on your own collection development policies when compiling your list of discards to share with other Zip libraries. For example, if your library has decided to not add an item because it is self-published and of poor quality, then you could assume that other libraries would not be interested in it for the same reason and, therefore, choose not to include it in your discard list. Sharing discards can be time-consuming, both in compiling your list and in shipping out items, but it is still required by the State Library. So in order to help streamline the process and lessen the amount of titles that are shared with others, you can choose to edit your discards list and only share the best items available, saving yourself and other libraries time and effort.

FISCAL

The Zip Books Project is a grant program that is supported with California Library Services Act funds. Given the nature of the program, there are certain fiscal policies and procedures that are set forth by NorthNet and the State Library, such as submitting invoices for payment and auditing. It is recommended that you review the “Zip Books Amazon Account Procedures” and “Zip Books Invoicing Procedures” documents (both available online thru the Zip Books website at: <https://northnetlibs.org/zip-books/>) to ensure that your local policies and procedures abide by these established program rules.

It’s also important to note that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in program funding or invoicing procedures, but other times these necessary modifications may come from your own internal assessments. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform your staff and patrons regarding any changes that might affect them.

Any questions regarding fiscal procedures or grant funding should be forwarded to the Zip Books Project Coordinator.

Amazon Account Best Practices

Zip Books Email

It is recommended that your library create a Zip Books dedicated email address when you begin to set up your program. Not only would you use this Zip Books email to open your Amazon account, but it would also serve as your program's main contact point for patrons to send their Zip questions and requests. Keep in mind that using a staff member's email address to open your Zip Books Amazon account can cause problems down the line, such as being locked out of your account, should the staff member be sick, on vacation, or leaves. By having a Zip Books email, multiple staff can have access to the account to check for notifications from Amazon or questions/requests from patrons. Some sample email addresses created by libraries include:

- PlumasCountyZip@gmail.com
- splzipbooks@ci.salinas.ca.us
- zipbooks@cityofimperial.org
- ziplibrary@co.mendocino.ca.us

Standard vs. Business Account

When your library first joins the Zip Books program, one of the first things you're asked to do is to create an Amazon account. Even if your library already has an Amazon account, you'll want to open one unique to Zip Books so that the billing remains distinct from any other materials or supplies that your staff order via Amazon. There are two types of Amazon accounts: Standard and Business. It is recommended that you open a Standard Amazon account instead of a Business account because the Prime membership fee is somewhat lower with a Standard account. Besides an increased Prime membership fee, Business accounts also have an annual account fee, which is not currently covered by the grant. A Standard account not only saves your library money, but many program instructions are based off of a Standard account so they are easier to follow. Instructions on how to generate an Amazon report may slightly differ with a Business account and require a bit of searching. However, there is a limitation to having a Standard account as Amazon does set a 500-name limit for the address book and will randomly delete names once you have reached this limit. A Business account does not have this limit and is more convenient for larger programs with lots of usage. Note that if your libraries does choose to set up a Business account, you will need to pay for the additional fees out-of-pocket as they are not covered by the grant at this time. However, it is possible for you to upgrade your account at a later date, so you could start with a Standard account and upgrade to a Business account if your program reaches over 500 unique users.

Government Entity

For libraries that establish an Amazon Corporate Credit Line (ACCL) as the payment method for their Zip Books Amazon account, it is also recommended that you make sure to set up your account as a “Government/Non-Profit Entity”. Doing so will mean that any late fees accrued will automatically be credited back to your account on the following month and will not need to be paid for by your library. If you did not do this at the time that your credit line was set-up, you are still able to contact your Synchrony Bank Account Manager and request that your account be updated as such. They may not be able to reverse past late fees, but it will help you avoid paying any future late fees.

Address Book

Given the fact that Standard Amazon accounts have a 500-name limit, your library staff may need to routinely maintain your address book by purging it of old addresses or patrons who are no longer a part of your system. You could also use your Zip Books tracking tool to find out which patrons request items rarely or infrequently. Although purging addresses is another added step to a process that already has many steps, doing this on a regular basis can help to keep your accounts up-to-date and make it easier to locate patrons in what can eventually become a long list of addresses. Furthermore, by being proactive, you prevent Amazon from randomly deleting names in your address book once you folks have exceeded 500 names. This cuts down the frustration and additional work of having to re-enter a patron’s shipping information. Depending on the size of your library and the popularity of your program, your library could choose to maintain your Amazon address book by purging it:

- Quarterly
- Bi-annually
- Annually, such as at the end of the fiscal year

Alternatively, you can also choose to do nothing and allow Amazon to randomly purge addresses once the limit has been met. This may mean that you won’t be able to find an address that you know should be saved in the address book, but it is one less thing to do.

Budgeting Best Practices

Monthly Budget

Zip Books funding is awarded on a 12 - month basis from July through June. Various factors are taken into consideration when determining your annual allocation, such as your library's certified population, the total amount of grant funds available for expenditures, past spending patterns (if available), anticipated future spending patterns, and additional considerations. As you begin to process Zip Books requests, you'll find that tracking these requests not only helps your program to be organized and efficient, but it also helps to ensure that you stay within budget. At the beginning of the process, your library was given a Certification of Funding letter that specified the amount awarded to your library. Should you find that more money is needed to carry you program through the fiscal year, you are welcome to request additional funds at a later date. However, although there may be supplemental funds available, it is not guaranteed that your library will receive the necessary amount of funds needed as it will depend on the total amount of funds available. Furthermore, supplemental allocations are generally only awarded in the spring.

It's also important to note that the Zip Books Project is a grant program supported by California Library Services Act funds, and that funds are finite. Therefore, we recommend that libraries make every effort to stay within their allotted budget and set a monthly budget. This could be as easy as dividing your annual allocation by 12 to determine the amount you can spend each month. As the year goes, this monthly budget can be adjusted to take into account any unspent funds during slower months or overspent funds during busy months.

Depending on how your library is organized, you may need to reach out to your Finance Department regularly to get updates on your remaining budget. You can also utilize your existing tracking tool to keep track of the amount of funds you spend each month. This is not only useful information for your Zip Books team to know, but other library staff as well. For instance, if it looks like you might be reaching your monthly budget limit, then staff members know to rein in the requests or vice versa.

To further stretch your funds, your library could also consider making some policy adjustments, either permanently or temporarily. For example, while the purchasing policies indicate that a maximum item limit of five items per patron per month is allowed, your library may instead choose to set a two-item limit to stretch your funds. You could also choose to set a household limit for those households with parents and children who may all be requesting Zip Books, which can quickly add up. You might also choose to only process those requests for items that you know will be added to your library collection, denying those requests that might be too specific, niche, or expensive.

Sharing Funding Availability

Not only is it useful for your Zip Books team and library staff to know your program funding availability, but patrons may also find this information useful as well. In the case of Siskiyou County Library, they made the unique choice to keep their patrons updated on their annual budget via their Zip Books information page at: <https://www.co.siskiyou.ca.us/library/webform/zip-books>. They chose to do this so that patrons are aware of the funds available and are more conscientious of the types of requests they submit. Allowing patrons this information also adds to the proprietary feeling of the program in which they feel that they are a part of the collection development process and have a role in building their library collection.

Although Siskiyou County Library updates their program funding on a weekly basis, funding information need not be shared or updated all the time. Perhaps this is only something you share when funds are low or when the end of the fiscal year is approaching and you want to encourage patrons to help you folks spend your remaining funds.

Supplementing Allocations

Occasionally, despite your best efforts, you might find that your program has spent at a faster rate than anticipated or that your grant funds were just not enough to carry you through the entire fiscal year. While supplemental allocations may be available from NorthNet, it isn't a guarantee that it will be enough to meet your needs. Some libraries are forced to pause their Zip Books program until the new fiscal year starts or until additional funds are granted. This is unfortunate but sometimes necessary. Conversely, libraries can also explore supplementing their Zip Books allocation with funds from their own library budget or with the support of their Friends of the Library. Libraries such as San Luis Obispo City – County Library have chosen to do this in order to continue the momentum of their program. If this is an option, it is one worth exploring.

Whether or not you are using grant funds or library funds for your Zip Books program, your library is still required to submit monthly statistics and fiscal reports so that program spending and growth can continually be tracked for the State Library. You should continue to use your Zip Books dedicated Amazon account, but your payment method may be different.

Invoicing Best Practices

Monthly Statements and Order History reports

In order to ensure that the Zip Books program remains within its grant budget, library spending is monitored by NorthNet’s Fiscal Department. Not only do they manage the payment of Zip Books invoices, but as part of their responsibilities they are also required by the State Library to routinely review and audit invoices to ensure program policies are being followed. In order to assist them in this, libraries need to submit any invoices received and additional documentation if requested. It is important that this be done in a timely manner as it not only helps the Fiscal Department to do their job effectively, but may help your library in avoiding any possible problems or issues, such as late fees or overspending.

If your library set up an Amazon Corporate Credit Line or ACCL, then you will receive a paper invoice in the mail each month. All pages of this invoice should be scanned and emailed as a PDF file to NorthNet at ZipBooksInvoice@northnetlibs.org within three days of receipt. Invoices not received on time may incur late fees, which the library will be responsible for paying using their own funds. However, as previously mentioned, confirming that your account is set-up as a “Government/Non-Profit Entity” can help you avoid late fees. Hard copies of any invoices received should be retained by your library for your own recordkeeping. An example of what an Amazon invoice will look like can be found in **Attachment O**.

If your library was issued an NLS credit card, then your monthly statements are sent directly to NorthNet instead of your library and you do not need to worry about submitting them for payment. However, you will need to submit an Amazon-generated Order History report to ZipBooksInvoice@northnetlibs.org for review before your payment can be processed. This is so the Fiscal Department can reconcile your credit card statement against your Order History report and verify the amount spent.

Instructions on how to generate this report can be found in STEP 8 of **Attachment N** and an example of what this report should look like is seen in **Attachment P**.

Complete invoicing instructions are included in the “Zip Books Invoicing Procedures” document, which you can find in the Supporting Documents section as **Attachment N**, or on our website: <https://northnetlibs.org/zip-books/>.



Photo courtesy of Christian Koszka, FreeTime Productions

Review Spending

Although NorthNet's Fiscal Department monitors program spending, it is also a good practice for your library to review your spending on a regular basis, whether weekly, monthly or quarterly. This is especially useful if you wish to have the most accurate, up-to-date spending numbers as our Fiscal Department can only work off the monthly invoices and Order History reports received, which will not include any orders your library placed since the last day of the invoice billing cycle. If your Zip Books tracking tool has the capability you could use it to review your spending, but you can also review your monthly invoices and generate your own Order History reports to help you determine your spending rate. If you are already doing this, you may have noticed that sometimes the total cost for an order may be reported differently in the invoice than in the Order History report. This is because the shipping costs for certain orders, such as Used items ordered from some third-party vendors, is not included in the regular Order History – Items type report, possibly because of the different processing times. You can use your invoices to confirm the actual amount charged, generate an Orders and Shipment report, or check the Order Details on Amazon. An example of what an Amazon Order Detail looks like can be found in **Attachment O**.

Should your library have any questions regarding your funding availability, or need assistance confirming the total amount spent, you are always welcome to reach out to the Zip Books Coordinator who will work with NorthNet's Fiscal Department to provide the information needed.

MARKETING

One aspect of the Zip Books program that has not been discussed much in past program procedures is marketing. Everyone knows that it should be done but discussions have not gone into detail on how to go about effectively marketing Zip Books. Some have chosen to do a minimum of marketing, or have marketed the program at the start but less so in subsequent years, while others have yet to make their big marketing push. Whatever the case may be for your library, there is no denying the important role that marketing plays in helping your local Zip Books program become known and continue to grow over the years.

Like many other processes and policies, libraries are given the freedom to determine the method and frequency of their program marketing. The methods and ideas shared here are best practices that have been used by participating libraries over the course of Zip Books history and are suggestions to help improve and streamline your marketing approach. Keep in mind that not all marketing suggestions will work for your library. You'll want to take stock of the time and resources available to you, and determine the best practices that will help you folks accomplish what it is that you are trying to do, whether it is simply announcing this new service, explaining policies and procedures to patrons, or trying to reach out to a select group of users.

It's also important to note that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in marketing materials or available resources, but other times these necessary modifications may come from your own internal assessments. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform your staff and public regarding any changes that might affect them. And as always, the Zip Books administrative team is available to provide assistance and guidance to your program as it continues to evolve and grow.

Marketing Plan Best Practices

Establish Plan

There are various marketing strategies that your library can use to promote Zip Books to your patrons and the larger community and will depend on the size of your staff and the resources available to you. Whatever methods your library chooses to employ, it's useful to establish some sort of marketing plan on how you wish to advertise Zip Books and what features you wish to promote, such as its convenience or as a cheaper alternative to ILL. For example, many libraries have generally found success promoting and growing their programs by using a three-pronged approach of being visible in the library and showcasing it as another great library service; having a webpage and/or online request form, which highlights the ease of use; and through word-of-mouth, encouraging both staff and patrons to recommend the program to others as an alternative way to get the books you need. Establishing a marketing plan will also mean that your library staff can be consistent in how you talk about the program so that there is less confusion on what Zip Books is and how it can benefit your library and community. Some useful questions to ask as you're building your marketing plan include:

- Does your library or city/county have an existing marketing plan or approach that you can build on or adapt for this program?
- What stakeholders, if any, need to be consulted before you can begin marketing Zip Books?
- What resources are available to you (staff, tools, materials, artwork, etc.)?
- How much time do you have to dedicate towards marketing?
- What are you trying to accomplish (get the general word out about the program or reach out specific communities like non-English speakers)?
- What marketing approaches have worked for your library in the past?
- Can your marketing approach be broken down into phases?

Adapt Plan

It's good to also keep in mind that marketing your program should be an ongoing process with your approaches changing as your program grows. For example, your initial marketing push will most likely focus on notifying all patrons about this new service and educating them on the process. This can be done via email announcements or press releases, displaying marketing materials around your libraries, and encouraging your library staff to talk about the new service with patrons. Later on, you might find that most of the requests you're receiving are for adult

fiction/non-fiction items, so you may then choose to focus your next marketing push on reaching out to other groups that could benefit from the program, such as non-English speaking users who could help build your foreign language collection, or children/teens who can help you learn what books or subjects are trending with the youth group.

Once your program launches and starts to become known, you will eventually build a base of regular users and may not need to advertise as much as you did before. Still, there will always be new groups and new patrons coming into the library so it is good practice to always remain visible in some way. It also helps to revisit your marketing plan after a year to see what worked and didn't work, what improvements can be made, and what methods eliminated.

Of course, some larger libraries also find it important to know when to stop marketing, such as when funds are running low or when staff are unable to keep up with the influx of requests. In these instances, actively marketing your Zip Books program may be disadvantageous and not worth the time and effort. So it's always good to know when to push your marketing and when to step back from it for a time.

Materials Best Practices

Zip Books Print Materials

The simplest form of advertising is utilizing the print marketing materials available to you to get the word out. Zip Books Project Management provides promotional material for every participating library when it joins the Zip Books family and leaves it up to libraries to use as needed. Many libraries will simply display the marketing materials near the checkout or reference desk at library branches, but materials can also be posted in other city/county department buildings and community boards. A number of libraries have also added the Zip Book bookmark or postcard to their “welcome kits” for new patrons getting a library card, which helps to highlight it as another unique service available to them at their local library.

Marketing materials are available in four formats: bookplate, bookmark, postcard, and poster. All materials except the bookplates are available in English and Spanish. Examples of these materials are included in **Attachment Q** and are also available for download through our Zip Books website:

<https://northnetlibs.org/zip-books/>. To request additional or replacement stock, all you need to do is send an email to Jacquie Brinkley, the Zip Books Project Manager, at brinkley@plpinfo.org indicating the amount of materials needed. Materials are sent directly from the printers so libraries are asked to check their full stock to see if any additional materials will be needed in the following months.



Photo courtesy of Christian Koszka, FreeTime Productions

Adapt Materials

Recently the Zip Books marketing materials were updated to include a new catchphrase near the Zip Books logo: Request, Read, Return. The materials also now clarify that audiobooks could be requested through the program. Nevertheless, there is still not much program information included on the printed marketing materials, largely due to the flexibility of the program, so patrons are encouraged to talk to library staff to learn more about how the program works at their local library. To assist in explaining how Zip Books works, its policies and procedures, some libraries like Yolo County Library have begun to adapt the existing marketing materials by including additional information on the backside. You could consider printing out some FAQs and

sticking it to the back of the postcard, or adapting the PDF file of the poster to create a flyer that includes step-by-step instructions on the back. A sample information sheet is available in **Attachment S**.

Likewise, your library might choose to adapt the existing marketing materials to better fit your specific needs. For example, Lake County Library created a mini bookplate for items that do not have the space to accommodate a regular-sized bookplate. These mini bookplates can be added to the inside cover of audiobooks, but they can also be attached next to the barcode sticker on the front cover without taking up too much space. A sample of their mini bookplates can be found in **Attachment R** of the Supporting Documents.

Create Materials

Libraries are also welcome to develop their own marketing materials as needed, whether to match the look of existing library marketing materials or to highlight a feature of the program. For example, Ontario City Library chose to create their own Zip Books flyer that incorporated their city/library logo and Redwood City Public Library created a flyer to specifically promote audiobook requests. Both sample flyers are shown in the Supporting Documents section as **Attachment R**.

Marketing Ideas Best Practices

Word of Mouth

Many Zip Books libraries have stated that word of mouth has been their most successful marketing tool. It is also probably one of the easiest to implement. Your library staff and volunteers play an important role in helping to get the word out about Zip Books by simply talking about it with patrons. For example, if you're helping a patron find an item that they can't locate on your shelves or catalog, then you could mention Zip Books as an option to finding the title they need. Or if you're issuing a new patron a library card, you might choose to highlight Zip Books as one of the many unique library services available to them. If your library puts on events (storytimes, talks, etc.) or hosts clubs (conversation club, teen club, book club, etc.) then make sure to mention Zip Books and how it could help them to get materials that are of interest to them. Several libraries have also mentioned that sharing the successes of the Zip Books program with

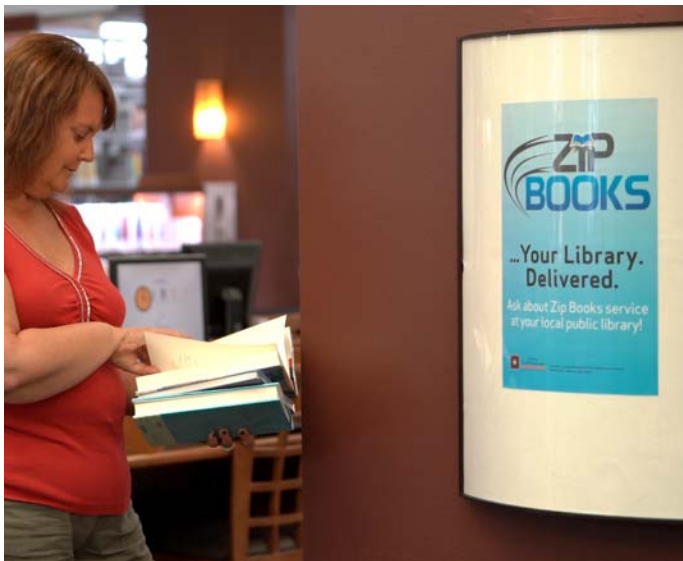


Photo courtesy of Christian Koszka, FreeTime Productions

their Library Board, Friends of the Library, and even other city/county departments has resulted in board members and volunteers utilizing the program and sharing it with others.

This is the beauty of using the word of mouth method to build your Zip Books user base because when you share it with one person, they might in turn share it with their families and friends, who then share it with their co-workers and it just builds and builds over time. If your library has limited resources to devote to marketing, then at the minimum you should utilize word of mouth.

Library Displays

Another simple way to market the program is to create Zip Books displays in your branches. Part of the appeal of the Zip Books program is that many of the items requested by patrons later get added into their library collection. Instead of simply adding these books to the shelves, where they may not get noticed, a number of libraries have also chosen to create displays that highlight these items and the variety of genres and topics that get requested. For instance, you could create a "Look what your community is reading" display or merely set aside an area in your new

or recently returned section to showcase the Zip Books items that have just been added to your library collection.

Many libraries have commented that patrons love to browse these Zip Books displays just to see what other people are requesting. It's almost like getting a book recommendation from a friend or browsing your neighbor's bookshelf. And it becomes a way in which both patrons and staff can learn more about the reading interests of your community to see what's trending or what's on everyone's mind.

Website and Social Media

As part of your library's marketing strategy, you should also consider promoting the program online by creating a library webpage that explains the program and provides a link to the online request form. Having an online presence, not only helps to make the program more visible, but it can also make the process of requesting materials quick and easy. Sample Zip Books webpages have been created by many libraries, including Corona Public Library (<https://bit.ly/2ZgrLuN>), Harrison Memorial Library (<https://bit.ly/2Zjtlmh>), and Kern County Library (<http://www.kerncountylibrary.org/zipbooks/>). Building such a webpage and online form may require the assistance of your technical department or webmaster, but many libraries have reported an uptick in usage by going online. You can find a complete list of all participating Zip Books libraries on the Zip Books website (<https://northnetlibs.org/zip-books/>) and explore what other libraries have done by clicking on the Google Map links.

In addition to or instead of creating a Zip Books webpage, you could also choose to market the program using your library's existing social media accounts. Some libraries have made posts on their library Facebook page announcing the start of the new fiscal year, or have shared photos of Zip Books items recently added to the library. This can be something easily done if you do not have the time or resources to create an online information page on your library website. And it can also be done frequently or infrequently, depending on the time available.

Press Releases and Articles

Perhaps you would like a formal way to announce the start of your Zip Books program or maybe you want to share the success of your program after a year or two. One great way that libraries have done this is by creating a press release that describes the program, highlights its growth, and demonstrates how it has impacted the library. This press release can be emailed to your subscribers or included in your Friends of the Library newsletter. You could also consider

reaching out to your local paper to see if they would be able to feature the program or library as a whole. A sample press release and article are included in **Attachment T** in the Supporting Documents section.

Library Catalog

Another simple idea for making Zip Books known to your patrons is to create links to your Zip Books webpage from your online public access catalog (OPAC). For instance, if a patron searched for an item in your catalog that turns out you folks don't carry, instead of your basic "No results found" response you could have a message that would forward that patron to your program webpage. Or, if your library does not have a Zip Books information page, then you could just have a message encouraging the patron to speak to a library staff member about the Zip Books program. This may require working with your library's technical department in order to implement, but it's a great way to let patrons know that Zip Books is an option available to them.

Program Partnerships

One marketing idea that has only been explored by a handful of libraries is the idea of forming partnerships with other library services or with outside community programs. These collaborations don't have to be formal and could even be as simple as making a presentation to their group. For example, if your library offers a literacy program or a homework help service, then you could reach out to the staff member in charge of the program to make sure their team members are aware of Zip Books and how it could benefit their users. If you offer a homebound/outreach service for patrons who are unable to make it into their local library, then you could possibly look into coordinating Zip Books to work alongside it. In one specific instance, one library formed a partnership with a local meals delivery agency to help their homebound patrons return their Zip Book requests to the library. Another library has offered the service on a case by case basis due to the fact that they don't have a formal homebound program in place. In another instance, Humboldt County Library has worked with the Two Feathers Native American Family Services group to help kids on the Hoopa Reservation request Zip Books items that can be sent and held for them at their local Hoopa Branch library. By reaching out to local community programs, you're not only getting the word out about Zip Books, but you could be forming future relationships that could help your greater community.

MANAGEMENT

The success of any Zip Books program relies on the hard-working staff members who help to manage and implement the various program policies and procedures. For most, the size of your library and how it is organized will determine the size of your Zip Books team. Most Zip libraries have only one or two library staff dedicated to managing the program, but there are also larger systems that have multiple departments involved during different stages in the process. No matter the size, having an established Zip Books team with clearly defined responsibilities is a big step in ensuring your local program runs smoothly and efficiently. The best practices shared in this section have been recommended by your Zip Books administrative team and also implemented by participating libraries over the course of Zip Books history.

Keep in mind that the management of your Zip Books program is ongoing and that adjustments may need to be made throughout the lifetime of your program. Sometimes these changes come from above, such as changes in program requirements, but other times these necessary modifications may come from your own internal assessments or from changes in your library staffing and resources. Adjustments are to be expected as you learn what works best for your library and what does not, just remember to inform the Zip Books project administration if there are any staff changes. Also, while your library may be running its program independently, it's useful to remember that you are still a part of the larger Zip Books family and that support is available if needed, whether it is from fellow libraries or from the administrative team. The Zip Books Project Coordinator can always be reached via email or phone if assistance or guidance is needed at any point. The administrative team is also open to hearing any suggestions on how they can improve the program and better support libraries, as well as any other best practices that you feel should be included in this toolkit. Whatever the situation, don't hesitate to reach out!

Zip Books Team Best Practices

Designated Zip Books coordinator

The first point listed in the Zip Books Letter of Commitment (see **Attachment U**) specifies that your library must assign at least two staff members to participate in the project, one supervisory and one support staff. Depending on the size of your library and the staffing available, this may be your Library Director and another staff member, or two staff members who report to the Library Director as needed. No matter the situation, we recommend designating one person as your library's Zip Books coordinator. This person would be responsible for supervising and coordinating the actual day-to-day running of the program and would also serve as your library's primary contact for project activities. If you are part of a large library system, having one designated point person for the Zip Books program also means that staff members know who to contact if there are ever any questions or issues regarding a Zip request.

If there are any changes to the staffing assigned to your program, you should notify the Zip Books administrative team as soon as possible.

Support Staff

While there are many small libraries in the Zip Books program that have limited staffing, we do recommend having at least one other support staff member to assist should your Zip Books coordinator be unavailable. This additional staff member or backup person can not only provide assistance when things get busy, but they can be delegated to handle a specific aspect of the program, such as ordering items or compiling statistics. And in the unfortunate incident of an unexpected staff change, having a support staff will also ensure that there is at least one other person at your library who is familiar with the program policies and procedures. This can make a major difference in helping to make a transition easy without much or any interruption in service.



Photo courtesy of Christian Koszka, FreeTime Productions

Other Departments

Depending on your library's staffing size and availability, it may also be possible to appoint different departments to manage an aspect of the program. For example, reference staff may be responsible for collecting Zip Books requests, while the interlibrary loan librarian would do the actual ordering on Amazon, and the collection development librarian could handle the Zip Books returns and catalog items if they are to be added to the collection. Furthermore, depending on your city/county's internal Fiscal procedures, you might also require the assistance of staff members outside of the library, such as your city's accounting department, to help handle the invoicing side of the program.

As your program grows over the years, you may find that you need to adjust your support staffing, perhaps in order to make the program more manageable or streamlined. So it's good to keep in mind that your Zip Books team is not permanent but always evolving.

Staff Participation

Although your library may only have one or two people directly working on Zip Books, it's useful to remember that all library staff have some role in the success of your program. Whether it's the children's librarian who is helping a child request the missing book in the series they're reading, or the library page who is assisting a patron to find books on a certain topic, all staff should be involved in marketing and explaining the program to patrons, as well as forwarding any requests or questions they receive. Just as you might introduce Zip Books to any new patron that walks through the door, you'll want to make sure that everyone on your staff is familiar with the basics of the program, such as how it works and how to submit a request. Not only will they be able to better explain the process to patrons, but they can also use the program for personal use (library staff are allowed two Zip Books requests each month).

Staff Training Best Practices

Utilizing Printed Resources

In order to assist in the management of your Zip Books program, various program documents have been created that help clarify policies, provide step-by-step instructions, and offer guidance on how to best implement things. Furthermore, additional program tools are always being developed and updated, such as the newly developed Onboarding toolkit and this Best Practices toolkit. These documents are occasionally shared through the Zip Books mailing lists, but they can always be found on the Zip Books website: <https://northnetlibs.org/zip-books/>. It is always good practice to use the available print resources as a starting reference point should any questions or issues arise during the various stages of building and running your Zip Books program. However, it is difficult to account for every problem and situation that can arise. In cases where policies are unclear or when specific situations fall into a grey area, library staff are encouraged to reach out to the Zip Books Project Coordinator for clarification or guidance on program policies and procedures. However, if faced with a time sensitive issue, staff may make their own call, choosing a course of action that provides customer service.

Utilizing Other Resources

Beyond the available printed resources is also a vast pool of other program resources available to your Zip Books team. Some are provided by Zip Books project management, while others tap into the general knowledge and experience gained by other fellow Zip libraries. Other resources include:

- ***Mailing List and Monthly Updates***

The Zip Books mailing list is the main form of communication for our program. Monthly emails are sent out to all the participating libraries with program news and reminders. Notify the Zip Books Project Coordinator if you wish to add (or remove) yourself or anyone else on your Zip Books team to/from the email list. Other pertinent emails may also be sent out regarding program updates and policy changes, so if you would prefer to distribute this information as needed, you're welcome to keep only the Library Director and Zip Books coordinator on this mailing list and forward emails when necessary to the rest of your library staff.

- ***Open Forums***

Another means of communication and one that promotes open discussion between

programs and project administration is the newly implemented Zip Books open forums. These forums provide libraries the opportunity to connect with one another to exchange ideas and ask questions. These online webinars are hosted through Zoom, but attendees are also able to join in by phone. Past topics have included invoicing procedures and best practices, and topic suggestions are always welcome. Forums are scheduled throughout the year with roughly one every quarter. All meetings are recorded for posterity and links to the video recordings and chat notes are shared via the mailing list. They will also be made available on the Zip Books website (<https://northnetlibs.org/zip-books/>) for review by future library staff.

- ***Listserv***

Sometimes it is more valuable and effective to talk with other library staff who have on-the-ground experience with daily Zip tasks. Another way that libraries are able to connect with one another is through the Zip Books Listserv. This platform is also used to share your discards. To post a question or share your discards lists, simply send an email to: ZIPBOOKS@LISTSERV.PLPINFO.ORG. To add (or remove) yourself or anyone else on your Zip Books team to the listserv, contact Jacquie Brinkley at brinkley@plpinfo.org. You can also unsubscribe from the list by sending an email to: ZIPBOOKS-signoffrequest@LISTSERV.PLSINFO.ORG.

- ***Mentorship Program***

To further connect libraries together, a Zip Books Mentorship Program was also recently formed. This newly minted program was created with new libraries in mind and pairs “young” programs with “veteran” programs in order to facilitate a beneficial exchange of knowledge and experience. Mentoring libraries help to guide new libraries through the process of building and launching their local programs and serve as another resource for questions and feedback.

- ***General Meeting***

Every year at the California Library Association conference a Zip Books General Meeting is held to give libraries the rare opportunity to meet the Zip Books administrative team and to network with fellow Zip libraries.

Additional Staff Instructions

In addition to the resources and training materials readily available, you may also find it necessary to create additional staff instructions clarifying any policies or procedures that are specific to your local program. For instance, although most staff will have some familiarity with

Amazon, you may still 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 of such a document is available from Redwood City Public Library in **Attachment E** of the Supporting Documents section. 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. To further orient staff on their ordering and cataloging process, Lake County Library has also created a “Zip Books Flowchart” as part of their training materials (see **Attachment C**). As you can see in their flowchart, not only does it help to guide staff through the process from beginning to the end, but it also clarifies which system or tool each step utilizes, whether it is Amazon, their Integrated Library System (Horizon), or their cataloging tool (OCLC Connexion).

Program Binder/Shared Folder

With so many various program documents out there from both project management and your own library, it may be useful to compile all training materials together in one place, such as a physical Zip Books binder or a shared online folder. Not only will it help to keep things organized, but it becomes an easy reference tool that your staff can go to whenever there are questions. In particular, if there are any staffing changes in your Zip Books team, everything that a new person would need to know about the program can be found in one place, making the training process quick and streamlined, and the transition process smooth and consistent. It is also recommended that you update your program binder or shared file folder at least once a year to make sure that the information housed there is up-to-date.

Additional Staff Training

Staff members who are designated to be a part of your Zip Books team will, of course, require additional training as needed. It’s the responsibility of the Library Director and/or Zip Books coordinator to ensure that their dedicated staff are trained regarding all program procedures and that policies are followed. Sometimes all it takes is a few training session, while other times it requires ongoing training. However, it’s useful to remember that mistakes are to be expected, especially when the program is just getting started. Should a policy be broken or an error in judgement, it is up to the Library Director and Zip Books coordinator to take corrective action and to notify the Zip Books project management if necessary.

Supporting Documents

Attachments and Examples

The various documents included here were created by Zip Books administrative team and participating Zip Books libraries across the state. Some documentation may not have the most current information. For the most up-to-date program documentation, go to the Zip Books website at <https://northnetlibs.org/zip-books/>.



Photo courtesy of Christian Koszka, FreeTime Productions

Attachment A – Purchasing Policies

The most up-to-date Purchasing Policies can be found online at <https://northnetlibs.org/zip-books/>

Zip Books Purchasing Policies

This is an overview of the Zip Books purchasing policies as set by NorthNet Library System and the California State Library. With approval from the Zip Books Project Coordinator, libraries can adapt policies to fit their specific needs. In cases where policies are unclear or when specific situations fall into a grey area, library staff are encouraged to reach out to the Zip Books Project Coordinator for clarification or guidance on program policies and procedures. However, if faced with a time sensitive issue, staff may make their own call, choosing a course of action that provides customer service.

1. Libraries should monitor the number of Zip Books requested by a patron at any one time, and may determine the maximum number, with a maximum allowable of 5 items per customer per month. Libraries can choose to allow patrons their maximum allowable items all at once, or limit it to one item at a time, depending on their own borrowing policies.
2. There is a two-tier expenditure cap of \$75 pre-tax for audiobooks and foreign-language items, and \$50 pre-tax for all other allowable items. Higher per-item expenditures must be approved by NorthNet. Should you run into a situation where you need to spend more than the set expenditure caps, send the Project Coordinator an email (nuesca@northnetlibs.org) detailing what you want to purchase or a link to the item.
3. Customers must be registered borrowers in good standing. This is generally defined as having a current library card with no more than \$5 in accumulated fines. However, libraries may choose to establish their own definition or restrictions, such as requiring the patron to be a resident of their jurisdiction. Borrowers may request Zip Books on the same day their library cards are issued.
4. Orders are restricted to books available in a tangible format through Amazon. Format is defined as regular print, large print or audiobook, and should be distinguished from binding type (hardback vs. paperback). There are no restrictions as to genre. Current fiction is okay, but adult fiction best sellers are not eligible unless purchasing in alternative formats, such as large print or audiobook. Non-fiction best sellers and young adult/children's best sellers are also okay to purchase, as well as former best seller titles that are no longer on the New York Times Best Seller list.
5. Please exercise judgment when ordering items such as textbooks and study guides, or items of higher cost. Make sure that these titles or types of materials are appropriate for your collection when you order them. Keep in mind that items not added to your library collection should first be offered to other participating Zip Books libraries within your consortium or throughout the state prior to donating it to your Friends of the Library.
6. Limit Zip Books purchases to requested items not already owned by your library or items with a LOST status in your library catalog. Using Zip Books to purchase alternative formats of a title owned by your library (such as large print or audiobook) is acceptable. Also using Zip Books to purchase items that patrons would have access to through a shared catalog, but are not owned by your individual library, is acceptable.

7. Orders must be limited to customer requests that would formerly have been handled through interlibrary loan (includes current fiction/non-fiction if not part of a library's collection development focus or outside the scope of a library's ability to purchase with their own funds).
8. You may continue to use traditional interlibrary loan at your discretion.
9. When placing orders, you should take advantage of the Amazon Prime free two-day shipping option whenever possible. If the free two-day shipping option is not available, select standard shipping. You should not use expedited shipping. Libraries may also choose to order non-Prime and/or Used items according to their discretion. Note that items purchased from other Amazon sellers will not have an option to include a gift slip/message.
10. Items should be shipped directly to the customer from Amazon (not to the library first). However, if it is in the best interest of the patron, exceptions may be made and items can be shipped to the library, a PO Box, or Amazon Locker (i.e....unsafe for deliveries to be made, patron request for personal reasons). Some sort of indication should be made on the shipping label identifying this as a Zip Books request so as to not raise any red flags when our Fiscal Dept reviews monthly reports. For example, the shipping name would be entered as "Patron Name – ZIP" or "Library Branch Name – ATTN: Zip Books".
11. Library staff members that are also patrons may be allowed to request Zip Books for personal use only and should be limited to no more than 1 or 2 items per month. This should be monitored onsite by the Zip Books coordinator. This will help to ensure that grant funds are used as intended.
12. Invoices for all Zip Books orders should be sent to ZipBooksInvoice@northnetlibs.org within 3 days of receipt. If an invoice is not received in time and late fees are incurred, the fees will be deducted from your allocation.

If you have any questions, please contact the Zip Books Project Coordinator (nuesca@northnetlibs.org).

Attachment B – Patron request forms

The following are samples of paper request forms. It is recommended to have both a paper and online request form if possible, in order to meet the needs of various patrons.

ZIP BOOK REQUEST Patron Name/Branch _____

Patron ID: _____ Date: _____ Phone (____) _____

Address: _____

Email: _____

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-----

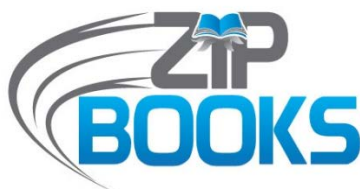
Item: _____ Price: _____

Date ordered: _____ Staff initials: _____

Item return date/staff initials: _____ Notes : _____

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

_____ Other (explain) _____



ZIP BOOKS / INTERLIBRARY LOAN REQUEST

(updated 9/22/15)

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.)

Attachment C – Zip Books Ordering Flowchart

This simple flowchart was created by Lake County Library to give their staff a basic outline of the Zip Books order process from beginning to end.

Zip Books Flowchart

This is a basic out line of the Zip order process. **ROUGH DRAFT**

Refer to the Zip 101 instructions for full details.

1	Go to list of Zip requests	
2	Horizon: Does the patron have fines over \$10? No. Proceed below.	YES. Notify patron fines need to be paid before Zip request can be processed.
3	Horizon: Does the patron have a Zip book checked out? NO. Proceed below.	YES. Flag the new request as WAIT.
4	Horizon: Is the book available at any Lake County branch in Horizon? REVISE NO. Proceed below.	YES. Request the book in Horizon for the patron. Inform patron that we aren't doing it as a Zip Book
5	Amazon: Is the book available in Amazon Prime? REVISE YES. Proceed below.	NO. Suggest interlibrary loan to the patron.
6	Amazon: Is the price more than \$35.00? REVISE NO. Proceed below.	YES. Ask Zip admin for permission to order. YES. Proceed to ordering. NO. Suggest interlibrary loan to the patron.
7	OCLC Connexion: Is there a bibliographic record for the book? YES. Proceed below	NO. We can't order. ILL probably won't work either. Notify patron.
8	OCLC Connexion: Export the bib record. Import into Horizon	
9	Amazon: place the order including a gift receipt.	
10	Amazon: Print the Amazon invoice. Write the branch assignment & call number on the invoice.	
11	Cataloging shortcut & Horizon: Import the bib record into Horizon.	
12	Horizon: Attach the book barcode to the bib record. See the Zip 101 instructions for all details.	
13	Horizon: Check the book out to the patron.	
14	Horizon: when book is returned, determine if library will keep or discard.	

Attachment D – Staff Procedures

The following are examples of procedural documents created by Kings County Library, Lake County Library, and Mendocino County Library in order to orient their staff on local processing procedures and policies.

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.**



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.

CKO to patron with the Zip barcode.

DETAILS.

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.

MENDOCINO COUNTY STAFF INSTRUCTIONS

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](tel: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.

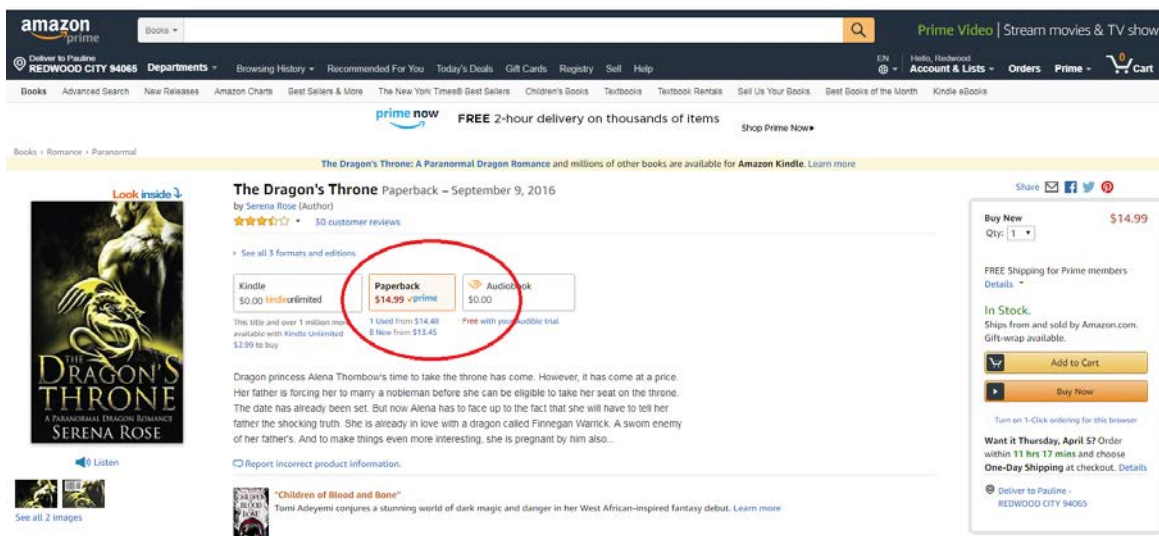
Thank you and enjoy!

Attachment E – Ordering procedures

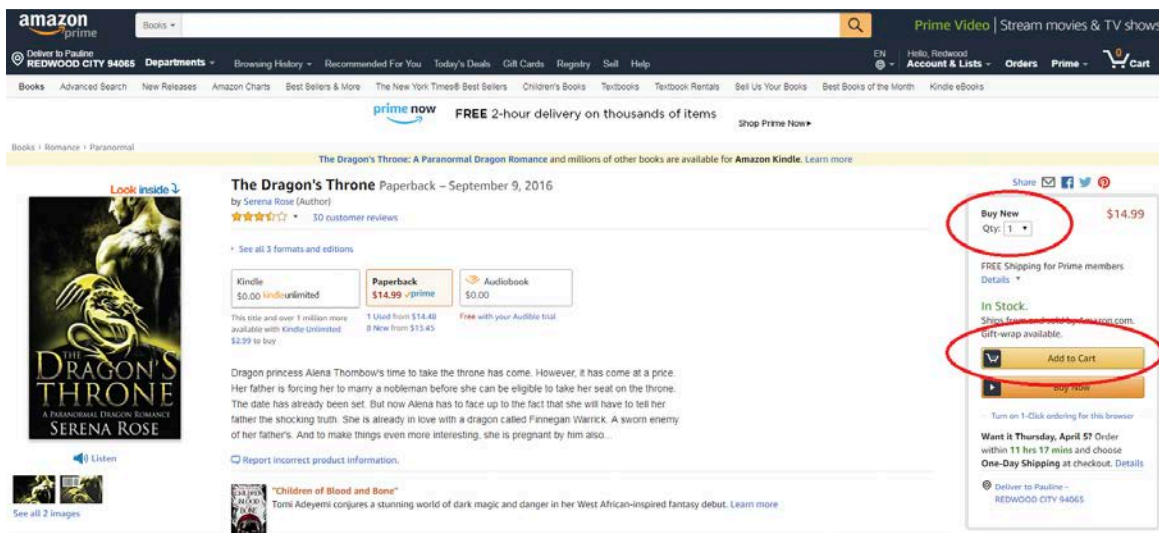
The following step-by-step instructions were created by Redwood City Public Library to guide staff on how to order Zip Books through the Amazon website.

Instructions for purchasing Zip Books

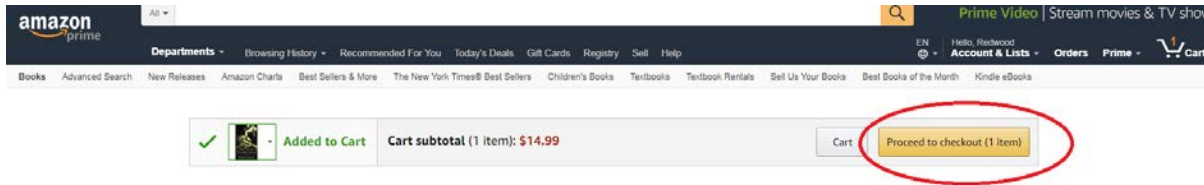
1. Check Library Catalog for item.
2. Select item, select format. MUST be available using Prime. May purchase used items if Prime shipping is available.



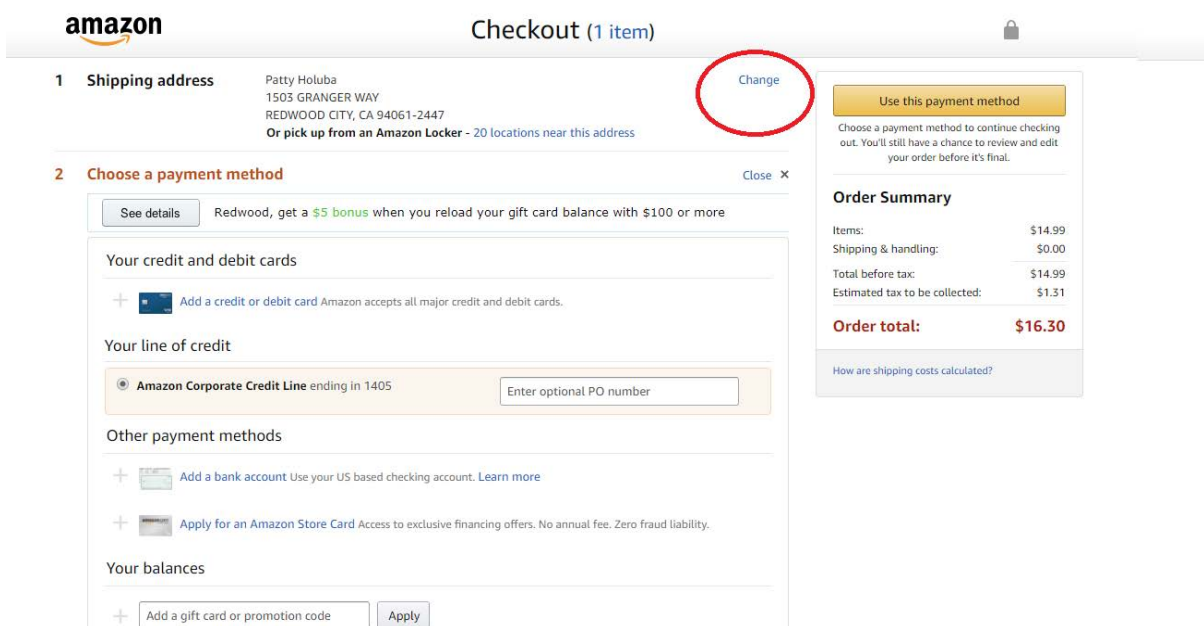
3. Select “Add to Cart” and make sure quantity is “1”.



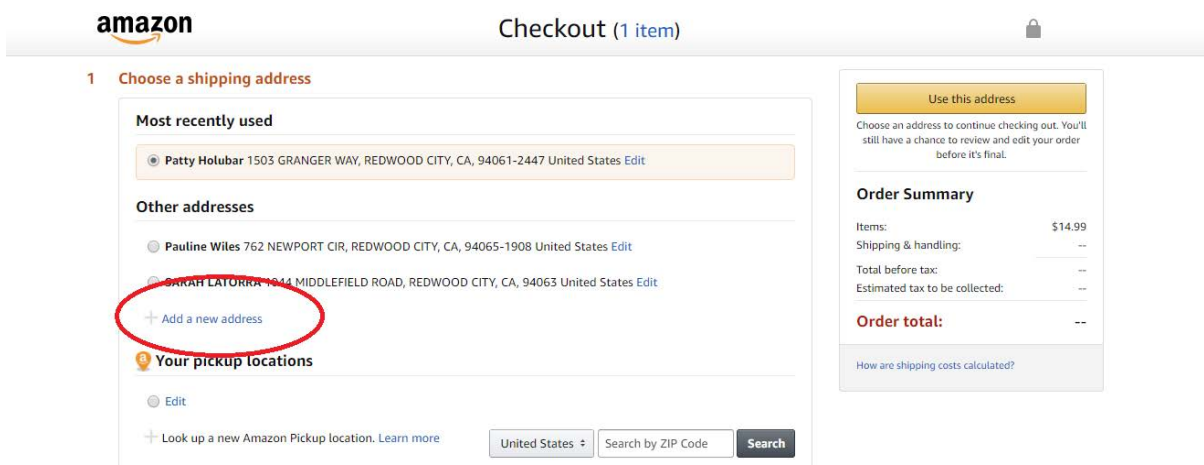
4. Select “Proceed to checkout” and make sure quantity is “1”.



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: ▼

Phone number: [Learn more](#) ▼

Additional Address Details | [What's this?](#) ▼

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:

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.

amazon Checkout (1 item)

1 **Shipping address** Change
 Pauline Wiles
 762 NEWPORT CIR
 REDWOOD CITY, CA 94065-1908
 Or pick up from an Amazon Locker - 20 locations near this address

2 **Choose a payment method** Close x
 See details Redwood, get a \$5 bonus when you reload your gift card balance with \$100 or more

Your credit and debit cards
 + Add a credit or debit card Amazon accepts all major credit and debit cards.

Your line of credit
 Amazon Corporate Credit Line ending in 1405

Other payment methods
 + Add a bank account Use your US based checking account. [Learn more](#)
 + Apply for an Amazon Store Card Access to exclusive financing offers. No annual fee. Zero fraud liability.

Your balances
 +

Order Summary
 Items: \$14.99
 Shipping & handling: \$0.00
 Total before tax: \$14.99
 Estimated tax to be collected: \$1.31
Order total: \$16.30
 How are shipping costs calculated?

9. Select “Add a gift receipt.” This allows us to add a message onto the package.

amazon Checkout (1 item)

1 **Shipping address** Change
 Pauline Wiles
 762 NEWPORT CIR
 REDWOOD CITY, CA 94065-1908
 Or pick up from an Amazon Locker - 20 locations near this address

2 **Payment method** Change
 Amazon Corporate Credit Line ending in 1405
 Billing address: SARAH LATORRA, 1044 MIDDLEFIELD ROAD, R...
 Add a gift card or promotion code

3 **Review items and shipping**

Want to save time on your next order and go directly to this step when checking out?
 Check this box to save your delivery and billing preferences.

Guaranteed delivery date: April 6, 2018 If you order in the next 21 hours and 30 minutes (Details)
 Items shipped from Amazon.com

The Dragon's Throne
 by Serena Rose
 \$14.99 FREE Shipping for Prime members
 Qty: 1

Sold by: Amazon.com Services, Inc.
 and see other gift options

Choose your Prime delivery option:
 Thursday, April 5
 \$5.99 - One-Day Shipping
 Friday, April 6
 FREE Two-Day Shipping
 Thursday, April 12
 FREE No-Rush Shipping
 Get a \$5 reward for a new cell phone case or accessory.
 Details

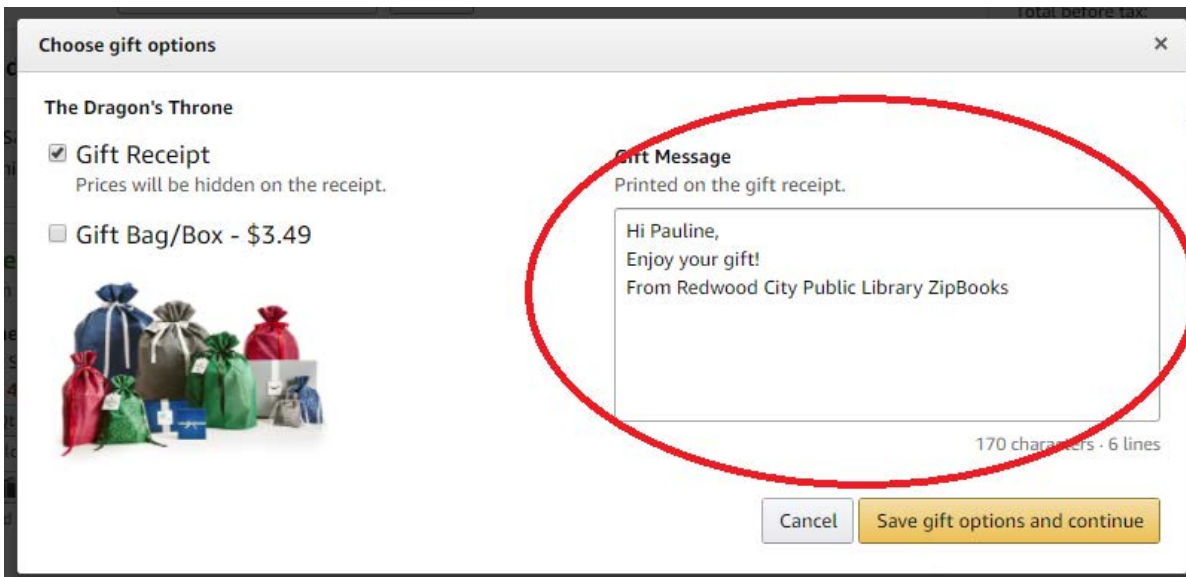
Order total: \$16.30
 By placing your order, you agree to Amazon.com's privacy notice and conditions of use.

Place your order
 By placing your order, you agree to Amazon's privacy notice and conditions of use.

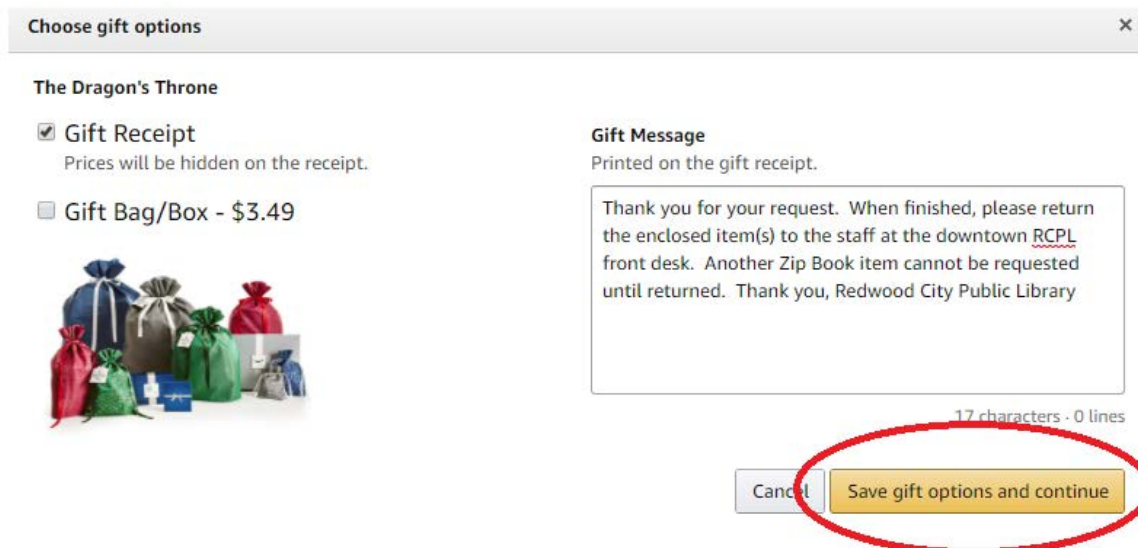
Order Summary
 Items: \$14.99
 Shipping & handling: \$0.00
 Total before tax: \$14.99
 Estimated tax to be collected: \$1.31
Order total: \$16.30
 How are shipping costs calculated?
 Prime shipping benefits have been applied to your order.

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.

The screenshot shows the Amazon checkout process for one item. The shipping address is Pauline Wiles at 762 Newport Cir, Redwood City, CA 94065-1908. The payment method is an Amazon Corporate Credit Line. In the 'Review items and shipping' section, the item 'The Dragon's Throne' by Serena Rose is listed. Under 'Choose your Prime delivery option', three options are shown: Thursday, April 5 (\$5.99 One-Day Shipping), Friday, April 6 (FREE Two-Day Shipping, circled in red), and Thursday, April 12 (FREE No-Rush Shipping). The order total is \$16.30. A 'Place your order' button is visible at the bottom left of the page.

13. If all information is correct, select "Place your order"

This screenshot is identical to the previous one, showing the same checkout details for 'The Dragon's Throne'. However, the 'Place your order' button at the bottom left of the page is circled in red, indicating the final step of the process. The shipping options and order total remain the same as in the previous screenshot.

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 F – Patron Notifications

The following are sample patron notifications that can be sent by email, included in Amazon order as Gift Message, or sent by post.

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.

Lake County Sample Gift Message



A gift for you

Hi [REDACTED], Please return this note &
your ZIP BOOK -FATAL SCANDAL-
to a library employee. This book is
checked out to you, due 12/19/19
barcode35253002770398 LAKE From
Lake County Library

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

July 20, 2017

Lake County Library
Zip Book Department
1425 North High Street
Lakeport, CA 95453-3800
707-263-8817 ext 17106



TO
Patron
Address
City, state zip

Account Number

First Notice.

Zip Book Overdue Notice

Your account is being charged for the following item.
This item is now overdue.

If you have any questions, please contact the library.

jmc

Item	
<p>Title</p> <p>Author</p> <p>Call Number</p> <p>Library Barcode</p> <p>Charges</p> <p>Due Date</p>	<p>ACCESSIBLE AND USABLE BUILDINGS AND FACILITIES</p> <p>ICC 8117.1-2009 American National Standard</p> <p>INTERNATIONAL BUILDING CONGRESS</p>

Lakeport Library
1425 N. High Street
Lakeport CA, 95453
707-263-8817
Tue, Thu-Sat 10am-5pm
Wed 12n-8pm

Redbud Library
14785 Burns Valley Road
Clearlake, CA 95422
707-994-5115
Tue, Thu-Sat 10am-5pm
Wed 12n-8pm

Middletown Library
21267 Calistoga Road
Middletown CA, 95461
707-987-3674
Tue - Fri 1-6pm
Sat 10am-3pm

Upper Lake Library
310 2nd St.
Upper Lake CA, 95485
707-275-2049
Tue - Fri 1-6pm
Sat 10am-3pm

	Please return this notice and the book to a library employee.
--	---

Lakeport Library
1425 N. High Street
Lakeport CA, 95453
707-263-8817
Tue, Thu-Sat 10am-5pm
Wed 12n-8pm

Redbud Library
14785 Burns Valley Road
Clearlake, CA 95422
707-994-5115
Tue, Thu-Sat 10am-5pm
Wed 12n-8pm

Middletown Library
21267 Calistoga Road
Middletown CA, 95461
707-987-3674
Tue - Fri 1-6pm
Sat 10am-3pm

Upper Lake Library
310 2nd St.
Upper Lake CA, 95485
707-275-2049
Tue - Fri 1-6pm
Sat 10am-3pm

Attachment G – Sample Tracking Spreadsheet

The following is a simple example of an Excel spreadsheet that can be used to track Zip Books requests during its various stages. Other libraries have also designed more complicated spreadsheets or created an Access database to track their Zip Books orders. The complexity of your tracking tool will depend on your own program needs.

Zip Book Requests											
							Remaining Budget	\$ 14,000.00			
Customer Name	Title	Author	Format Type (Book, Large Print, Audiobook)	Book Genre (AD FIC, AD NF, YA FIC, YA NF, J FIC, J NF, INT FIC, INT NF)	Language	Date Requested Service	Arrival (Received) Date	Item Cost	Email Sent/Called	Return Date	Added/FOL/Other Library
ex: Sarah La Torre	Twilight	Meyer	Book	YA FIC	English	3/26/18	3/30/18	\$ 19.99		4/10/18	FOL

Attachment H – Statistics Reporting Procedures

The most updated Statistics Reporting Procedures can be found online at <https://northnetlibs.org/zip-books/>

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.
4. Review the "Sample of Completed Zip Books FY19-20 Report" Excel spreadsheet for clarification on statistics questions (available at <https://northnetlibs.org/zip-books/>).

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 I – Statistics Reporting Form

The following is the Excel spreadsheet form that is used to submit statistics each month.

Zip Books Monthly Statistics 2019 - 2020 <small>(rev. 6/24/19)</small>		Note: Additional statistics required during the month of April (see APRIL 2020 STATISTICS tab)
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):	
Large empty area for comments		

▶	MONTHLY	APRIL 2020 Statistics	+
---	---------	-----------------------	---

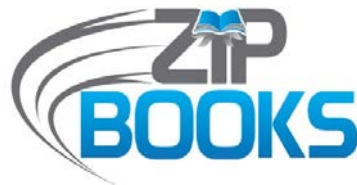
Attachment J – Completed Statistics Reporting Form

The following is an example of a completed statistics reporting form that helps to clarify the questions asked and the data needed.

Zip Books Monthly Statistics 2019 - 2020 <small>(rev. 6/24/19)</small>				
Library Name: <i>ZIP BOOK LIBRARY</i> Date Service Launched (first year): <i>October 2018</i> Month: <i>April</i>		Note: Additional statistics required during the month of April (see box below)		
1	Running total of first-time Zip Books customers served since launch:			Total # of new customers served over time with each individual counted only once (this running total may increase each month)
		<i>325</i>		
2	Number of Zip Books added to library collection this month:			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
			<i>164</i>	
3	Comments/Feedback (optional):			
	<i>Customer comment: "Our whole family is a fan of the Zip Books program!"</i>		Include any comments or feedback from patrons and library staff regarding the Zip Books program, policies, procedures, etc.	

Attachment K – Zip Books Returns Form for Staff

A return form such as this can be used by your library to assist with your End Processing Procedures in helping to identify Zip Books returns that will need to be assessed to determine where they should go.



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:

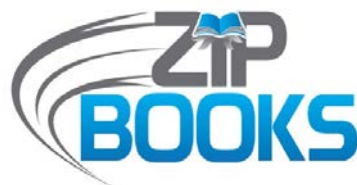
Patron Name:

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 L – Zip Books Libraries by Cooperative System

The following is a list of participating Zip Books libraries organized by their respective cooperative library system. The most current list can be found online at <https://northnetlibs.org/zip-books/>.

Zip Books Libraries by Cooperative System

This is a list of all the libraries currently participating in the Zip Books program, distinguished by their cooperative system.

NorthNet Library System

Alpine County Library & Archives
Butte County Library
Colusa County Free Library
Del Norte County Library
El Dorado County Library
Folsom Public Library
Humboldt County Library
Lake County Library
Lassen Library District
Lincoln Public Library
Mendocino County Library
Modoc County Library
Mono County Free Library
Nevada County Library
Orland Public Library

Placer County Library
Plumas County Library
Roseville Public Library
Sacramento Public Library
San Rafael Public Library
Shasta Public Libraries
Siskiyou County Free Library
Sutter County Library
Tehama County Library
Trinity County Library
Willows Public Library
Woodland Public Library
Yolo County Library
Yuba County Library

Pacific Library Partnership

Harrison Memorial Library
Los Gatos Public Library
Monterey County Free Library
Monterey Public Library

Pacific Grove Public Library
Redwood City Public Library
Salinas Public Library
San Benito County Free Library

49-99 Cooperative Library System

Amador County Library
Calaveras County Library

Stanislaus County Library
Tuolumne County Library

San Joaquin Valley Library System

Kern County Library
Kings County Library
Madera County Library

Merced County Library
Tulare County Free Library

Black Gold Cooperative Library System

Blanchard / Santa Paula Public Library
District
Goleta Valley Library
Lompoc Public Library

Paso Robles Library
San Luis Obispo City - County Library
Santa Barbara Public Library
Santa Maria Public Library

Southern California Library Cooperative

Camarillo Public Library
Long Beach Public Library

Ventura County Library

Santiago Library System

Placentia Library District

Inland Library System

Banning Library District
Beaumont Library District
Corona Public Library
Inyo County Free Library
Murrieta Public Library

Ontario City Library
Palo Verde Valley Public Library
Riverside County Library System
Riverside Public Library
Victorville City Library

Serra Cooperative Library System

Brawley Public Library
Camarena Memorial Public Library
(Calexico)
Chula Vista Public Library

El Centro Public Library
Imperial County Library
Imperial Public Library

If you have any questions, please contact the Zip Books Project Coordinator (nuesca@northnetlibs.org).

Attachment M – Zip Books Discards List

The following are examples of Zip Books Discards lists that are shared using the Zip Books listserv. Discards lists can be shared via Excel format, Amazon Wish List, and more.

Zip Books available from Shasta Public Libraries					
Title	Author	ISBN	Year	Binding	Condition
Blink	Dekker, Ted	9780849943713	2002	paperback	good condition, some page yellowing
A Ringing Glass: The Life of Rainer Maria Rilke...	Prater, Donald	198158912	1994	paperback	fair condition, yellow highlighting
A Warmth in Winter	Copeland, Lori	9780849943065	2001	paperback	fair condition, ex-library
Blue Gold	Cussler, Clive		2000	audiobook cds	4 audio cds, abridged
Horse of a Different Color: Reminiscences of a Kansas C	Moody, Ralph	9780803282179	1994	paperback	good condition, cover creasing
How to Train Your Viking (by Toothless)	Cowell, Cressida	9780340917466	2006	paperback	fair, cover creased and scored
INFJ 101	HowExpert Press & Lindsa	9781545143711	2019	paperback	like new
Lake Shasta Caverns	Winther, Radar		1970	pamphlet	good condition
Preston Bound	Diaz, Hernan	9781980587736	2019	paperback	like new
Price Guide for Insulators: A History and Guide to Nort	McDougall, John & Carol		1995	spiral bound	like new
Real Ponies Don't Go Oink!	McManus, Patrick	805016511	1991	hardback	like new
Seven Days to Confidence: Practical Strategies to Tran	Taylor, Ros	9780756787486	2000	hardback	like new
The Chocolate Touch	Catling, Patrick Skene	9780688161330	2006	paperback	good
The House of Mirrors (Ulysses Moore #3)	Moore, Ulysses	9780439776721	2005	paperback	good, light cover creasing
The Isle of Masks (Ulysses Moore #4)	Moore, Ulysses	9780439776714	2006	paperback	very good
Teach Like Finland. 33 Simple Strategies for Joyful Clas	Walker, Timothy D.	9781324001256	2017	hardback	like new except for blue marker on 1st page and back of dust jacket
The Testament of Jesse Lamb: A Novel	Rogers, Jane	9780062130808	2011	paperback	like new
Tolkien's Failed Quest	Jones, E. Michael	9781521406816	2017	paperback	very good, 28 pgs.
Wolf to the Slaughter	Rendell, Ruth	9780099534822	2009	mass market paperback	fair, stickers on cover, creased spine
How to Write a Movie in 21 Days	King, Viki	9780062730664	2001	paperback	good
No Promises in the Wind	Hunt, Irene	9780425099698	1993	mass market paperback	good

Your Lists **Your Idea Lists** **Your Friends** List help

Customer Public Name

Available Titles - January More

Filter & Sort

	<p>Our Spacecraft Over Your Earth: The Stranger From the Pentagon Speaks by Valiant Thor (Paperback)</p> <p>★★★★☆ 10 \$15.99 <input type="button" value="prime"/></p>	"A little bent. "	<p>Added January 14, 2020</p> <input type="button" value="Add to Cart"/> Buying this gift elsewhere?
	<p>Abandoned Faith: Why Millennials Are Walking Away and How You Can Lead Them Home by Alex McFarland, Jason Jimenez (Paperback)</p> <p>★★★★☆ 36 \$5.69 <input type="button" value="prime"/> 46 Used & New from \$5.39</p>	"Like new "	<p>Added January 14, 2020</p> <input type="button" value="Add to Cart"/> Buying this gift elsewhere?
	<p>Thinking About You, Thinking About Me by Michelle Garcia Winner (Paperback)</p> <p>★★★★☆ 27 \$67.00 29 Used & New from \$49.26</p>	"OK condition "	<p>Added January 14, 2020</p> <input type="button" value="Add to Cart"/> Buying this gift elsewhere?
	<p>A Traveller's History of Portugal by Ian Robertson (Paperback)</p> <p>★★★★☆ 7 \$11.63 <input type="button" value="prime"/></p>	"Like new "	<p>Added January 14, 2020</p> <input type="button" value="Add to Cart"/>

Attachment N – Invoicing Procedures

The most updated Invoicing Procedures can be found online at <https://northnetlibs.org/zip-books/>

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. **ANY** invoices received should be forwarded within 3 days of receipt, whether or not a payment is due. You do not need to mail in your hard copies.
3. If an invoice is not received in time and late fees are incurred, the library will be responsible for paying those late fees using their own funds. Amazon Accounts set up as a “Government/Non-Profit Entity” will have their late fees automatically credited back to their account on the following month and do not need to be paid by the library. To find out if your account is set up as a “Government/Non-Profit Entity” or to request that it be set up as such, contact your Synchrony Bank Account Manager (1-866-634-8381).
4. 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).
5. 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.
6. 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.
7. 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
8. 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 History Report" on the Help page.

- 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.

If you have any questions, please contact the Zip Books Project Coordinator (nuesca@northnetlibs.org).

Attachment O – Sample Amazon Invoice and Order Details

This is an example of what your Amazon invoice will look like, as well as a copy of the Order Details for a purchase.

Sample Amazon Statement and Order Details

- 1) ALL pages should be scanned and emailed to ZipBooksInvoice@northnetlibs.org
Statements will include the following sample pages

The image shows a sample Amazon invoice and order details form. It includes a header with the Amazon logo and 'amazon.com'. The main section is titled 'PAYMENT STUB' and 'Page 1 of 56'. It contains account information, a statement date of 03/10/19, and a payment address for the City of Imperial Public Library. A yellow callout box highlights an authentication code 'S1181987' and notes that it is needed to register the account online and is only valid for a short period of time. Below this, there are sections for 'Payments Received' and 'Current Invoices (Details for Current Month's Invoices Enclosed)'. The 'Current Invoices' section contains a table with columns for Date, Invoice, Original Amount, Due Date, Reference, Invoice, and Date & Amount Due.

amazon.com

PAYMENT STUB
Page 1 of 56

Account: [REDACTED] Statement Date: 03/10/19 Page: 1 of 56 Account: [REDACTED]

CITY OF IMPERIAL PUBLIC L
[REDACTED]

PLEASE INDICATE ADDRESS CHANGES

PAYMENT ADDRESS
SYNCB/AMAZON
P.O. BOX 530958
ATLANTA, GA 30353-0958

Customer Service Online at amazon.com/creditline
This account is not registered.
The authentication code is **S1181987**

Payments Received

02/13/19	0002836	(1188.71)	PAYMENT RECEIVED - THANK YOU
03/07/19	0002929	(1766.09)	PAYMENT RECEIVED - THANK YOU
02/09/19	L190210-781	(12.40)	LATE CHARGE REVERSAL
01/09/19	L190110-781	(4.72)	LATE CHARGE REVERSAL

Current Invoices (Details for Current Month's Invoices Enclosed)

Date	Invoice	Original Amount	Due Date	Reference	Invoice	Date & Amount Due
02/07/19	497577448865	15.38	05/05/19		497577448865	02/07 15.38
02/09/19	696564887677	17.39	05/05/19		696564887677	02/09 17.39
02/09/19	868487393498	15.99	05/05/19		868487393498	02/09 15.99
02/09/19	954944973557	18.32	05/05/19		954944973557	02/09 18.32
02/11/19	854497793647	29.04	05/05/19		854497793647	02/11 29.04
02/12/19	459696376339	15.51	05/05/19		459696376339	02/12 15.51
02/12/19	435875864858	15.51	05/05/19		435875864858	02/12 15.51
02/12/19	448533643635	12.60	05/06/19		448533643635	02/12 12.60
02/12/19	443968368443	24.73	05/05/19		443968368443	02/12 24.73
02/13/19	433497865547	18.03	05/05/19		433497865547	02/13 18.03
02/13/19	549937935588	21.29	05/05/19		549937935588	02/13 21.29
02/13/19	746398579559	20.96	05/05/19		746398579559	02/13 20.96
02/13/19	469384595764	26.94	05/05/19		469384595764	02/13 26.94
02/13/19	959675853684	29.04	05/05/19		959675853684	02/13 29.04

-Continue-

COLR0813 7828 5001 SHG 34 190311 PAGE 00002 OF 00057 5654

amazon.com

PAYMENT STUB

Page 7 of 56

Account: [REDACTED] Statement Date: 03/10/19 Page: 7 of 56 Account: [REDACTED]

Current Invoices (Details for Current Month's Invoices Enclosed) (continued)

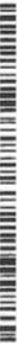
Date	Invoice	Original Amount	Due Date	Reference
03/07/19	456464487578	10.96	05/05/19	
03/08/19	455754769334	19.28	05/05/19	
03/08/19	455945899855	17.77	05/05/19	
03/08/19	853343479353	14.39	05/05/19	
03/08/19	594333336688	6.38	05/05/19	
03/08/19	557889779347	17.20	05/05/19	
03/08/19	447895658663	22.42	05/05/19	
03/09/19	639545599378	13.57	05/05/19	
03/09/19	468938777473	18.81	05/05/19	
03/09/19	437695477565	15.99	05/05/19	

Invoice	Date & Amount Due
456464487578	03/07 10.96
455754769334	03/08 19.28
455945899855	03/08 17.77
853343479353	03/08 14.39
594333336688	03/08 6.38
557889779347	03/08 17.20
447895658663	03/08 22.42
639545599378	03/09 13.57
468938777473	03/09 18.81
437695477565	03/09 15.99

Unapplied Payments & Credits

Date	Reference	Original Amount	Description
02/26/19	563583936766	(12.78)	CR MEMO
02/26/19	655739775583	(15.06)	CR MEMO
03/07/19	0002929	(1766.09)	UNAPPLIED PAYMENT

Reference	Date & Current Amount
563583936766	02/26 0.00
655739775583	02/26 0.00
0002929	03/07 (82.06)



6-9
593

Current Invoices:	\$ 2526.57
Previously Billed Invoices:	\$ 0.00
Unapplied Payments & Credits:	\$ (1793.93)

Send payments to:
P.O. Box 530958
Atlanta GA 30353-0958

For billing/general inquiries:
PO Box 965055
Orlando FL 32896

For Customer Service:
Call 1-866-634-8381

Account: 60457 8781 064078 5

NO PAYMENT IS DUE

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

AMOUNT ENCLOSED \$

Retain: left hand portion for your records, send right hand portion with your payment. If not sending stub, note account number, if being paid on your check.

If you have unapplied payments and credits, please call us at 866-634-8381 for instructions to apply. You do not need to contact us if you are paying with a credit card.

This is the number to call if you have questions about your statement or have not received it for the month. Note: you will need to know the account number (top of statement) and they may need to verify you work for the library

NOTE: If there are multi-item orders or duplicate orders listed, you may be asked to provide the Order Details (see sample on next page)

amazon.com

Account: [REDACTED] Statement Date: 03/10/19 Page: 22 of 56

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L
Account : 8781 064078 5
Location: 0001

Date of Sale: 02/20/19
Invoice: 635687636586
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0060574259	The Berenstain Bears' Valentin	1.000	EA	6.9900	6.99
MISC	SHIPPING AND TAX	1.000	EA	0.5400	0.54
Subtotal: 7.53		Tax: 0.00		Balance Due: 7.53	

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L
Account : 8781 064078 5
Location: 0001

Date of Sale: 02/20/19
Invoice: 737367866663
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0316349585	House of Robots: Robot Revolut	1.000	EA	13.9900	13.99
MISC	SHIPPING AND TAX	1.000	EA	1.0800	1.08
Subtotal: 15.07		Tax: 0.00		Balance Due: 15.07	

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L
Account : 8781 064078 5
Location: 0001

Date of Sale: 02/20/19
Invoice: 875446976638
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0310734894	The Berenstain Bears' Valentin	1.000	EA	3.8300	3.83
MISC	SHIPPING AND TAX	1.000	EA	0.3000	0.30
Subtotal: 4.13		Tax: 0.00		Balance Due: 4.13	

-Continue-

COLR0813 7828 5001 SHG 34 190311 PAGE 0025 OF 0057 5534

- 2) If requested, Order Details for specified purchases should be sent as a PDF file to ZipBooksInvoice@northnetlibs.org

3/20/2019 Amazon.com - Order 114-4180994-0737018

Final Details for Order #114-4180994-0737018
[Print this page for your records.](#)

Order Placed: March 7, 2019
Amazon.com order number: 114-4180994-0737018
Order Total: \$13.04

Shipped on March 8, 2019

Items Ordered	Price
1 of: <i>Mozart's Sister (Women of History) (Volume 1)</i> , Moser, Nancy <small>Sold by: Amazon Digital Services, Inc.</small>	\$11.99
<small>Condition: New</small>	

Shipping Address: <div style="background-color: black; width: 100%; height: 30px;"></div>	<table style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: right;">Item(s) Subtotal:</td><td style="text-align: right;">\$11.99</td></tr> <tr><td style="text-align: right;">Shipping & Handling:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td style="text-align: right;">Total before tax:</td><td style="text-align: right;">\$11.99</td></tr> <tr><td style="text-align: right;">Sales Tax:</td><td style="text-align: right;">\$1.05</td></tr> <tr><td style="text-align: right;">Total for This Shipment:</td><td style="text-align: right;">\$13.04</td></tr> </table>	Item(s) Subtotal:	\$11.99	Shipping & Handling:	\$0.00	Total before tax:	\$11.99	Sales Tax:	\$1.05	Total for This Shipment:	\$13.04
Item(s) Subtotal:	\$11.99										
Shipping & Handling:	\$0.00										
Total before tax:	\$11.99										
Sales Tax:	\$1.05										
Total for This Shipment:	\$13.04										

Shipping Speed:
Two-Day Shipping

Payment information

Payment Method: Amazon Corporate Credit Line	<table style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: right;">Item(s) Subtotal:</td><td style="text-align: right;">\$11.99</td></tr> <tr><td style="text-align: right;">Shipping & Handling:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td style="text-align: right;">Total before tax:</td><td style="text-align: right;">\$11.99</td></tr> <tr><td style="text-align: right;">Estimated tax to be collected:</td><td style="text-align: right;">\$1.05</td></tr> <tr><td style="text-align: right;">Grand Total:</td><td style="text-align: right;">\$13.04</td></tr> </table>	Item(s) Subtotal:	\$11.99	Shipping & Handling:	\$0.00	Total before tax:	\$11.99	Estimated tax to be collected:	\$1.05	Grand Total:	\$13.04
Item(s) Subtotal:	\$11.99										
Shipping & Handling:	\$0.00										
Total before tax:	\$11.99										
Estimated tax to be collected:	\$1.05										
Grand Total:	\$13.04										

Billing address

Credit Card transactions AmazonPLCC ending in : March 8, 2019: \$13.04

To view the status of your order, return to [Order Summary](#).

[Conditions of Use](#) | [Privacy Notice](#) © 1996-2019, Amazon.com, Inc. or its affiliates

https://www.amazon.com/gp/css/summary/print.html/ref=ppx_od_dt_b_print_invoice?ie=UTF8&orderID=114-4180994-0737018
1/1

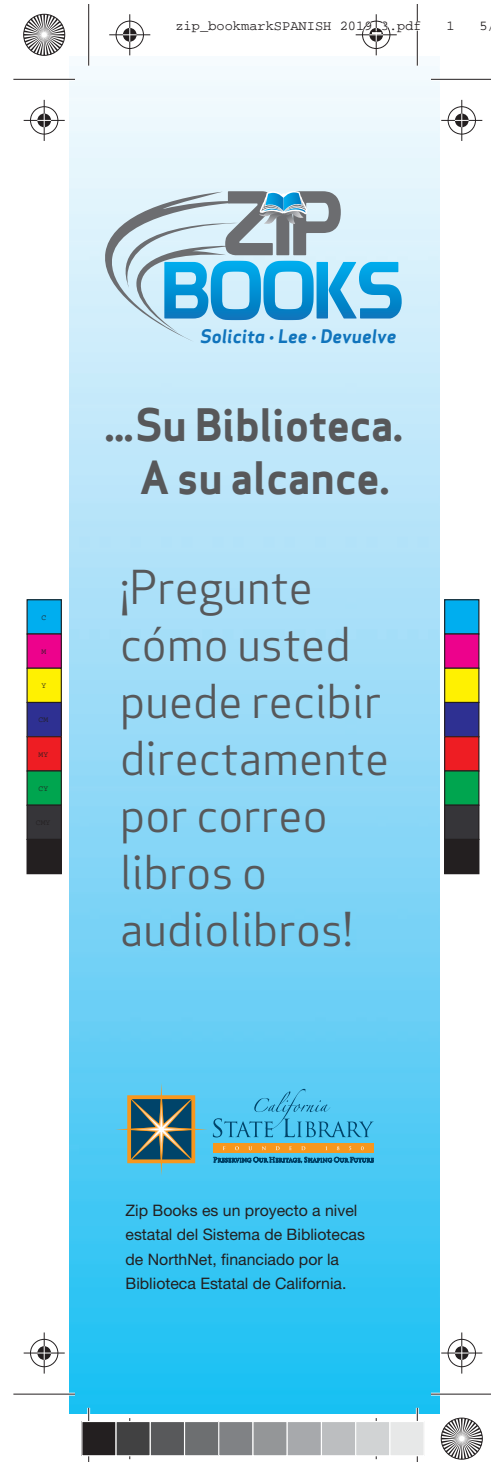
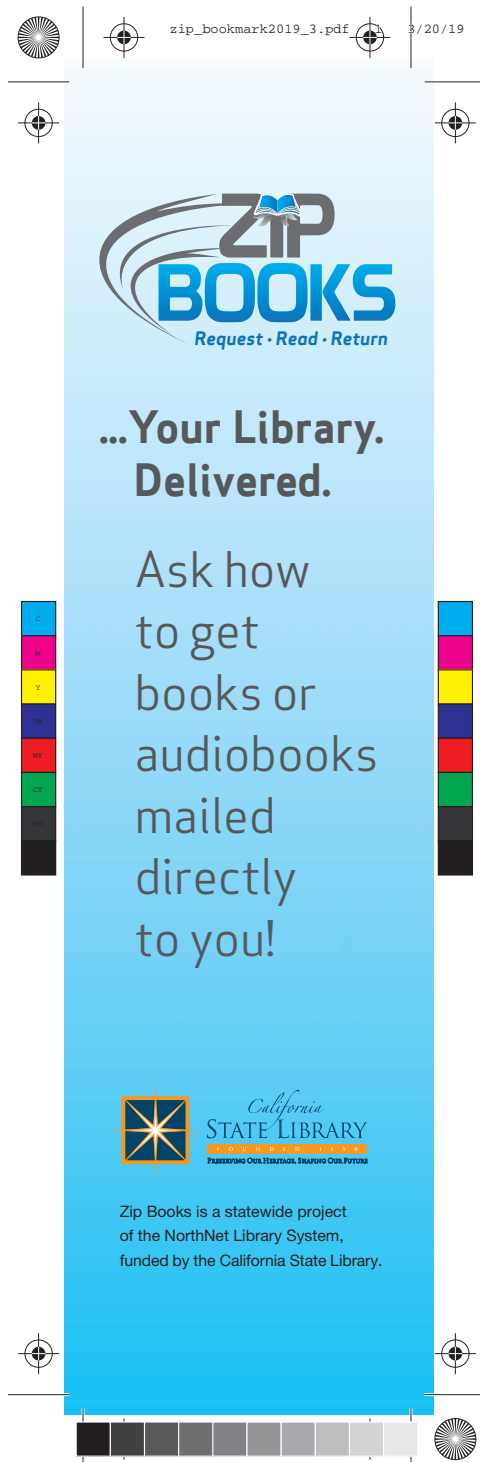
Attachment P – Sample Amazon Order History report

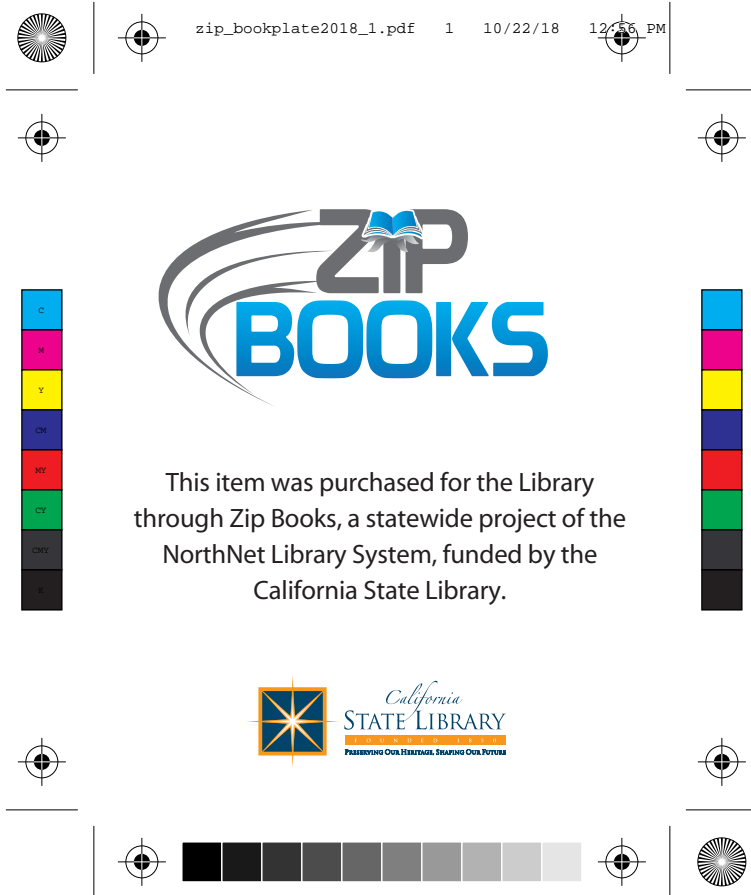
This Amazon-generated report should include vital information such as the item title, format, shipping date, shipping address, and cost.

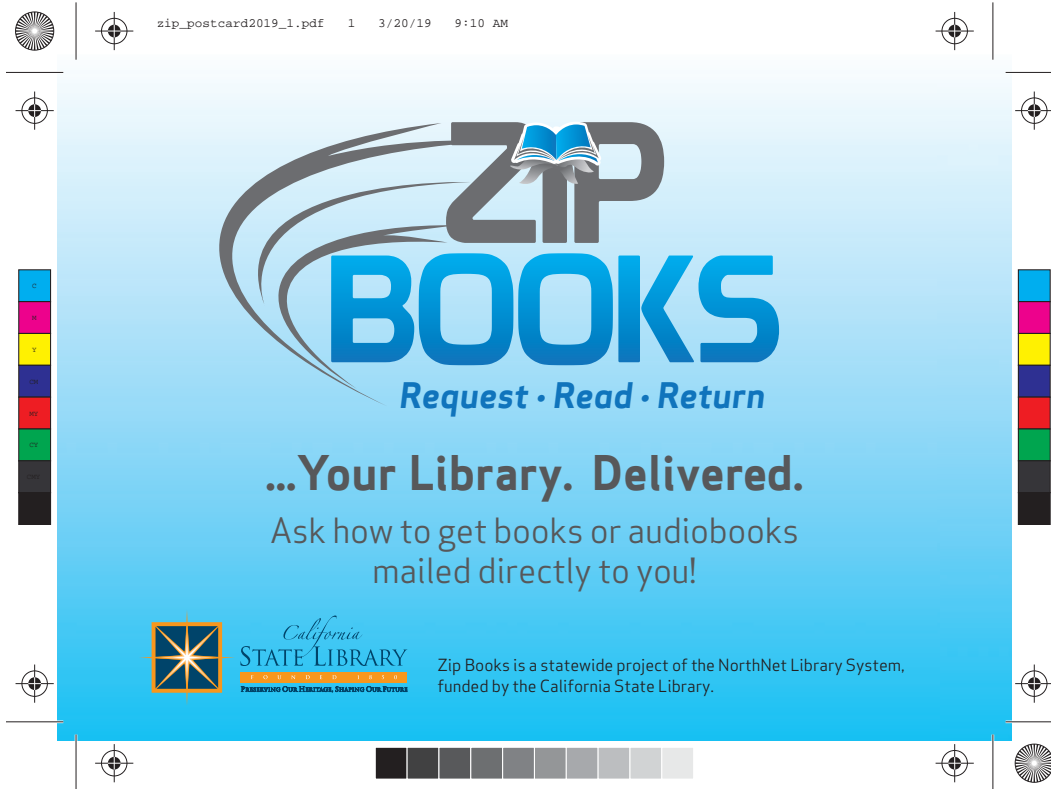
	A	B	C	D	N	O	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD
1	Order Date	Order ID	Title	Category	Quantity	Payment Instr	Ordering Cur	Shipment Di	Shipping Address N	Shipping Ad	Shipping Ad	Shipping Ad	Shipping Ad	Shipping Ad	Order Status	Carrier Nam	Item Subtot	Item Subtot	Item Total
2	10/2/17	111-734175	Studio: Creative Spaces for Creative Peopl	Hardcover	1	Visa - 9818	ill@banning	10/2/17	PATRON NAME	1234 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$23.79	\$1.84	\$25.63	
3	10/2/17	111-012842	How To Make It in the New Music Busines	Hardcover	1	Visa - 9818	ill@banning	10/3/17	PATRON NAME	1235 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$20.36	\$1.58	\$21.94	
4	10/4/17	111-742560	Comer atentos (Mindful Eating): Guvka pa	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1236 BOOK DRIVE	BANNING	CA	92220-3382	Shipped	USPS®93419	\$11.52	\$0.89	\$12.41	
5	10/4/17	111-207089	The Chorbobs	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1237 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®93419	\$15.98	\$1.24	\$17.22	
6	10/4/17	111-183567	The Sword Thief (The 39 Clues, Book 3)	Hardcover	1	Visa - 9818	ill@banning	10/6/17	PATRON NAME	1238 BOOK DRIVE	BEAUMONT	CA	92223-2084	Shipped	USPS®93419	\$8.27	\$0.64	\$8.91	
7	10/4/17	111-249350	Yoga Body and Mind Handbook: Easy Pose	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1239 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$12.90	\$1.00	\$13.90	
8	10/4/17	111-941478	And Then She Was GONE: A riveting new s	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1240 BOOK DRIVE	BANNING	CA	92220-3441	Shipped	USPS®93419	\$7.19	\$0.56	\$7.75	
9	10/7/17	111-470991	The Creative Home: Inspiring Ideas for bes	Hardcover	1	Visa - 9818	ill@banning	10/8/17	PATRON NAME	1241 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$22.65	\$1.76	\$24.41	
10	10/9/17	111-094124	The Creative Vegan Bean Book: More than 10	Paperback	1	Visa - 9818	ill@banning	10/10/17	PATRON NAME	1242 BOOK DRIVE	BANNING	CA	92220-3783	Shipped	USPS®93419	\$15.16	\$1.17	\$16.33	
11	10/10/17	111-615884	The Marriage Lie (Thorndike Press Large Pr	Hardcover	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1243 BOOK DRIVE	BANNING	CA	92220-5261	Shipped	USPS®93419	\$30.07	\$2.33	\$32.40	
12	10/10/17	111-970486	Locke & Key, Vol. 6: Alpha & Omega	Paperback	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1244 BOOK DRIVE	BANNING	CA	92220-2410	Shipped	USPS®93419	\$13.95	\$1.08	\$15.03	
13	10/11/17	111-477513	Rainbow Magic Special Edition: Flora the	Mass Mark	1	Visa - 9818	ill@banning	10/12/17	PATRON NAME	1245 BOOK DRIVE	BANNING	CA	92220-2524	Shipped	USPS®93419	\$4.22	\$0.33	\$4.55	
14	10/12/17	111-841428	To All the Boys I've Loved Before	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1246 BOOK DRIVE	BANNING	CA	92220-4649	Shipped	USPS®93419	\$10.58	\$0.82	\$11.40	
15	10/12/17	111-244097	Go Ask Alice	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1247 BOOK DRIVE	BANNING	CA	92220-6127	Shipped	USPS®93419	\$16.19	\$1.25	\$17.44	
16	10/12/17	111-069676	12 Ways to Get to 11 (Aladdin Picture Bo	Paperback	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1248 BOOK DRIVE	BANNING	CA	92220-1928	Shipped	USPS®93419	\$6.87	\$0.53	\$7.40	
17	10/13/17	111-927893	Switch	Paperback	1	Visa - 9818	ill@banning	10/15/17	PATRON NAME	1249 BOOK DRIVE	BANNING	CA	92220-5134	Shipped	USPS®93419	\$14.72	\$1.14	\$15.86	
18	10/13/17	111-793898	The Christmas Chapel	Paperback	1	Visa - 9818	ill@banning	10/14/17	PATRON NAME	1250 BOOK DRIVE	BANNING	CA	92220-5112	Shipped	USPS®93419	\$13.52	\$1.05	\$14.57	
19	10/16/17	111-307070	A Wind in The House Of Islam: How God Is	Paperback	1	Visa - 9818	ill@banning	10/17/17	PATRON NAME	1251 BOOK DRIVE	BANNING	CA	92220-5409	Shipped	USPS®93419	\$14.59	\$1.13	\$15.72	
20	10/18/17	111-158461	The Glitter Dome	Paperback	1	Visa - 9818	ill@banning	10/19/17	PATRON NAME	1252 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®12K46	\$14.70	\$1.14	\$15.84	
21	10/19/17	111-569923	A Memory of Violets: A Novel of London's	Paperback	1	Visa - 9818	ill@banning	10/20/17	PATRON NAME	1253 BOOK DRIVE	BANNING	CA	92220-7151	Shipped	USPS®93419	\$11.07	\$0.86	\$11.93	
22	10/24/17	112-390252	Let's Go for a Drive! (An Elephant and Pigg	Hardcover	1	Visa - 9818	ill@banning	10/24/17	PATRON NAME	1254 BOOK DRIVE	WHITEWATE	CA	92282-3104	Shipped	SUREPOST®1	\$8.99	\$0.70	\$9.69	
23	10/24/17	111-931480	The Lance: The Project: Book Two	Paperback	1	Visa - 9818	ill@banning	10/25/17	PATRON NAME	1255 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$10.95	\$0.85	\$11.80	
24	10/24/17	111-885803	90 Minutes in Heaven: A True Story of Dea	Paperback	1	Visa - 9818	ill@banning	10/26/17	PATRON NAME	1256 BOOK DRIVE	BANNING	CA	92220-1951	Shipped	USPS®93419	\$9.02	\$0.70	\$9.72	
25	10/27/17	111-189406	On a Pale Horse (Incarnations of Immortal	Mass Mark	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1257 BOOK DRIVE	BANNING	CA	92220-1868	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61	
26	10/27/17	111-678336	60 Ways to Lower Your Blood Pressure: W	Paperback	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1258 BOOK DRIVE	BANNING	CA	92220-3607	Shipped	USPS®93419	\$8.92	\$0.69	\$9.61	
27	10/30/17	111-053999	The Seventh Pillar: The Project: Book Thre	Paperback	1	Visa - 9818	ill@banning	10/31/17	PATRON NAME	1259 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$17.67	\$1.37	\$19.04	
28	11/1/17	111-892500	The Widower's Wife: A Thriller	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1260 BOOK DRIVE	BANNING	CA	92220-3441	Shipped	USPS®93419	\$18.10	\$1.40	\$19.50	
29	11/1/17	111-777410	How to Make It: 25 Makers Share the Secre	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1261 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$12.34	\$0.96	\$13.30	
30	11/1/17	111-312138	String Instrument Setups: 10 Setups That	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1262 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$18.16	\$1.41	\$19.57	
31	11/1/17	111-531112	Man's Search for Meaning, Gift Edition	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1263 BOOK DRIVE	BANNING	CA	92220-5482	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61	
32	11/2/17	111-282543	The Delta Star	Mass Mark	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1264 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®93419	\$25.12	\$1.95	\$27.07	
33	11/6/17	111-555335	How to Make Your Band Sound Great: Mu	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1265 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$30.59	\$2.37	\$32.96	
34	11/6/17	111-794409	Beautiful: All-American Decorating and Ti	Hardcover	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1266 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$9.95	\$0.77	\$10.72	
35	11/6/17	111-388414	Black Harvest: The Project: Book Four (Vol	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1267 BOOK DRIVE	BANNING	CA	92220-3382	Shipped	USPS®93419	\$11.52	\$0.89	\$12.41	
36	11/7/17	111-814889	Autismo (Spanish Edition)	Paperback	1	Visa - 9818	ill@banning	11/8/17	PATRON NAME	1268 BOOK DRIVE	BANNING	CA	92220-4454	Shipped	USPS®93419	\$11.67	\$0.90	\$12.57	
37	11/9/17	111-954624	How Now Shall We Live?	Paperback	1	Visa - 9818	ill@banning	11/9/17	PATRON NAME	1269 BOOK DRIVE	BANNING	CA	92220-4143	Shipped	USPS®93419	\$11.81	\$0.92	\$12.73	
38	11/10/17	111-327436	Cold Tangerines: Celebrating the Extraord	Paperback	1	Visa - 9818	ill@banning	11/10/17	PATRON NAME	1270 BOOK DRIVE	BANNING	CA	92220-3770	Shipped	USPS®93419	\$15.19	\$1.18	\$16.37	
39	11/13/17	111-938430	The Fever Code: Book Five; Prequel (The M	Hardcover	1	Visa - 9818	ill@banning	11/14/17	PATRON NAME	1271 BOOK DRIVE	BANNING	CA	92220-5885	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61	
40	11/15/17	111-105000	The Isle of the Lost: A Descendants Novel (Paperback	1	Visa - 9818	ill@banning	11/16/17	PATRON NAME	1272 BOOK DRIVE	BANNING	CA	92220-5885	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61	

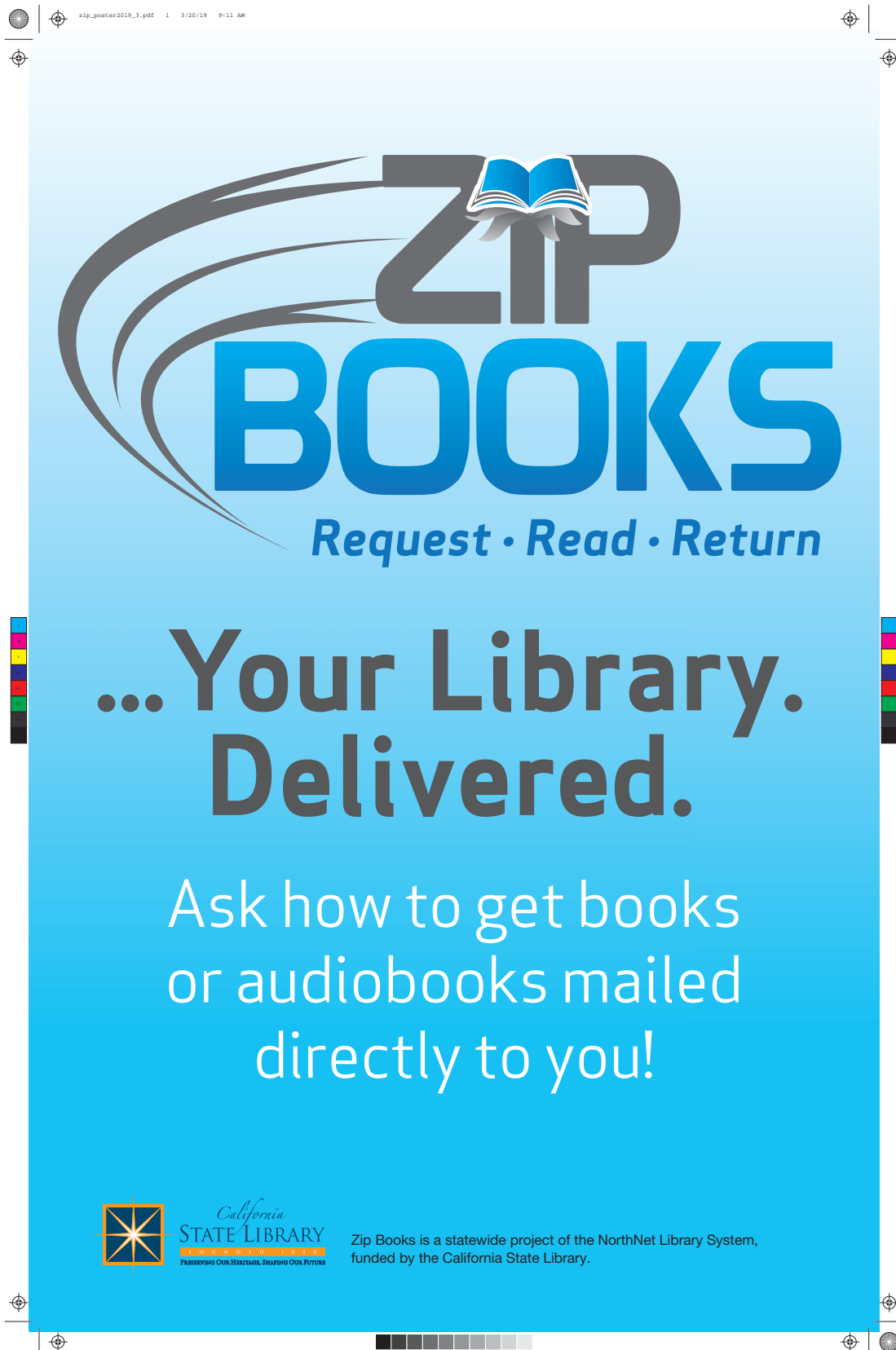
Attachment Q – Marketing Materials

Zip Books has available marketing materials in in both English and Spanish and in four different formats: bookmark, bookplate, postcard, and poster.









zip_posterSPANISH2019_3.pdf 1 5/3/19 10:49 AM



**ZIP
BOOKS**
Solicita • Lee • Devuelve

**...Su Biblioteca.
A su alcance.**

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

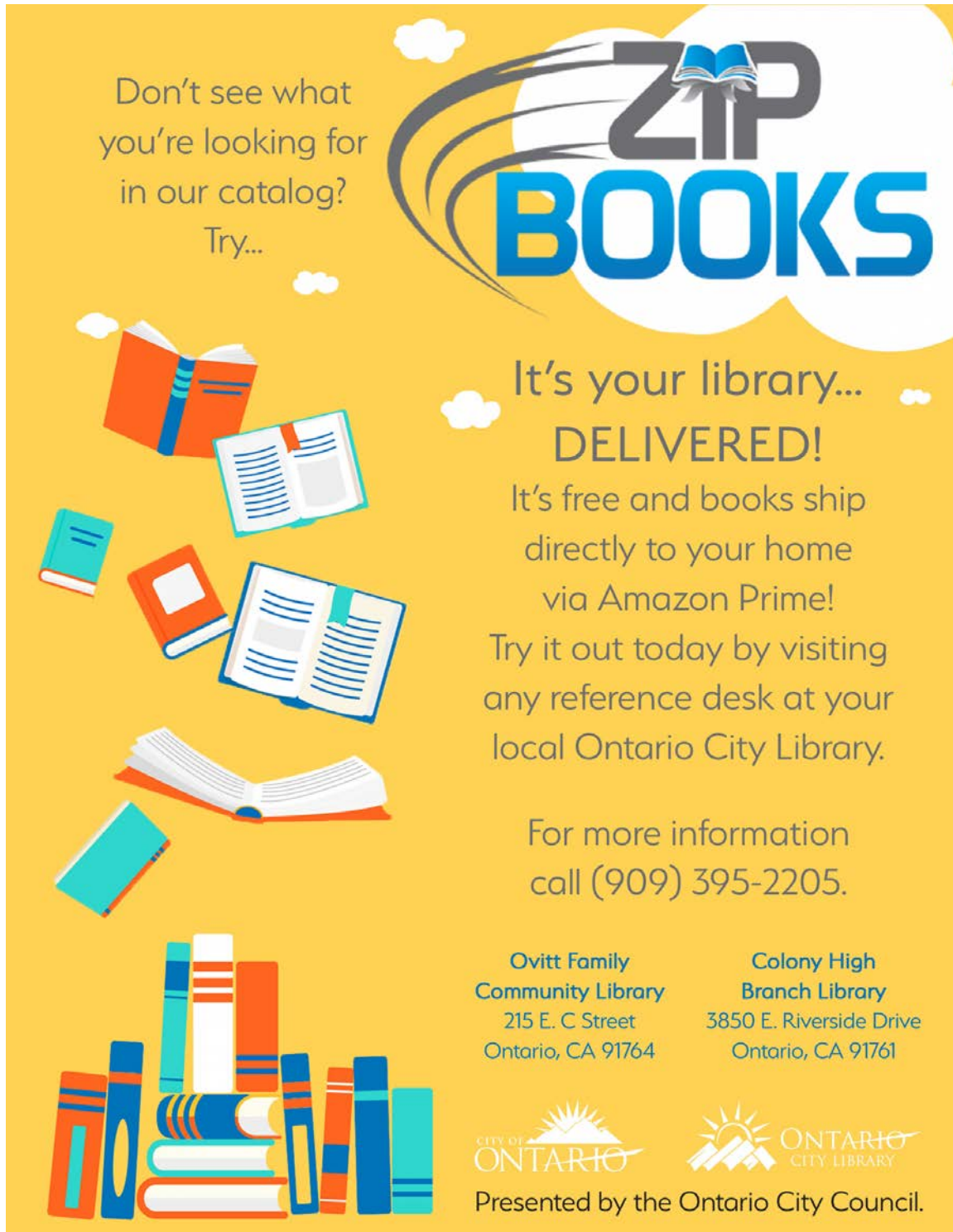


California
STATE LIBRARY
PROVIDING OUR HERITAGE, SHAPING OUR FUTURE

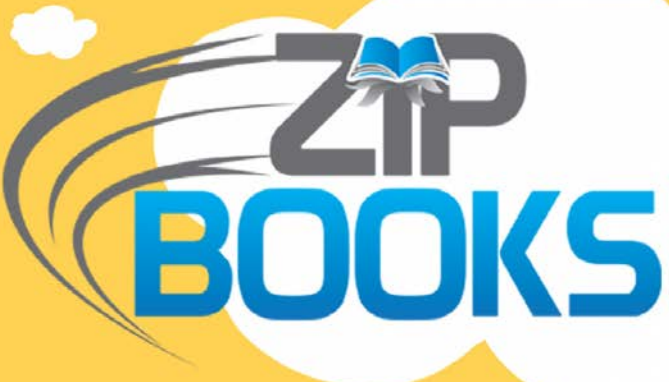
Zip Books es un proyecto a nivel estatal del Sistema de Bibliotecas de NorthNet, financiado por la Biblioteca Estatal de California.

Attachment R – Library Marketing Materials

These are additional examples of marketing materials that libraries have adapted and created to promote Zip Books or to highlight a particular aspect of their program.



Don't see what you're looking for in our catalog?
Try...






It's your library...
DELIVERED!
It's free and books ship directly to your home via Amazon Prime!
Try it out today by visiting any reference desk at your local Ontario City Library.

For more information call (909) 395-2205.

Ovitt Family Community Library
215 E. C Street
Ontario, CA 91764

Colony High Branch Library
3850 E. Riverside Drive
Ontario, CA 91761



Presented by the Ontario City Council.

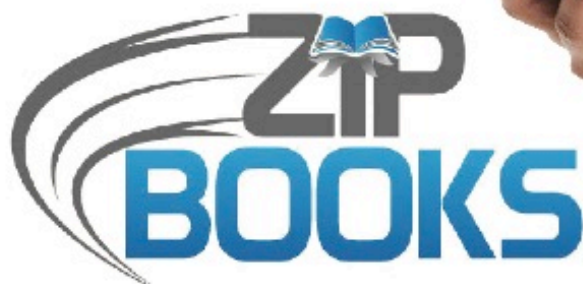
Looking for an **AudioBook**

that the Redwood City
Public Library doesn't own?


Have it sent to your home
with our **ZipBook Project!**

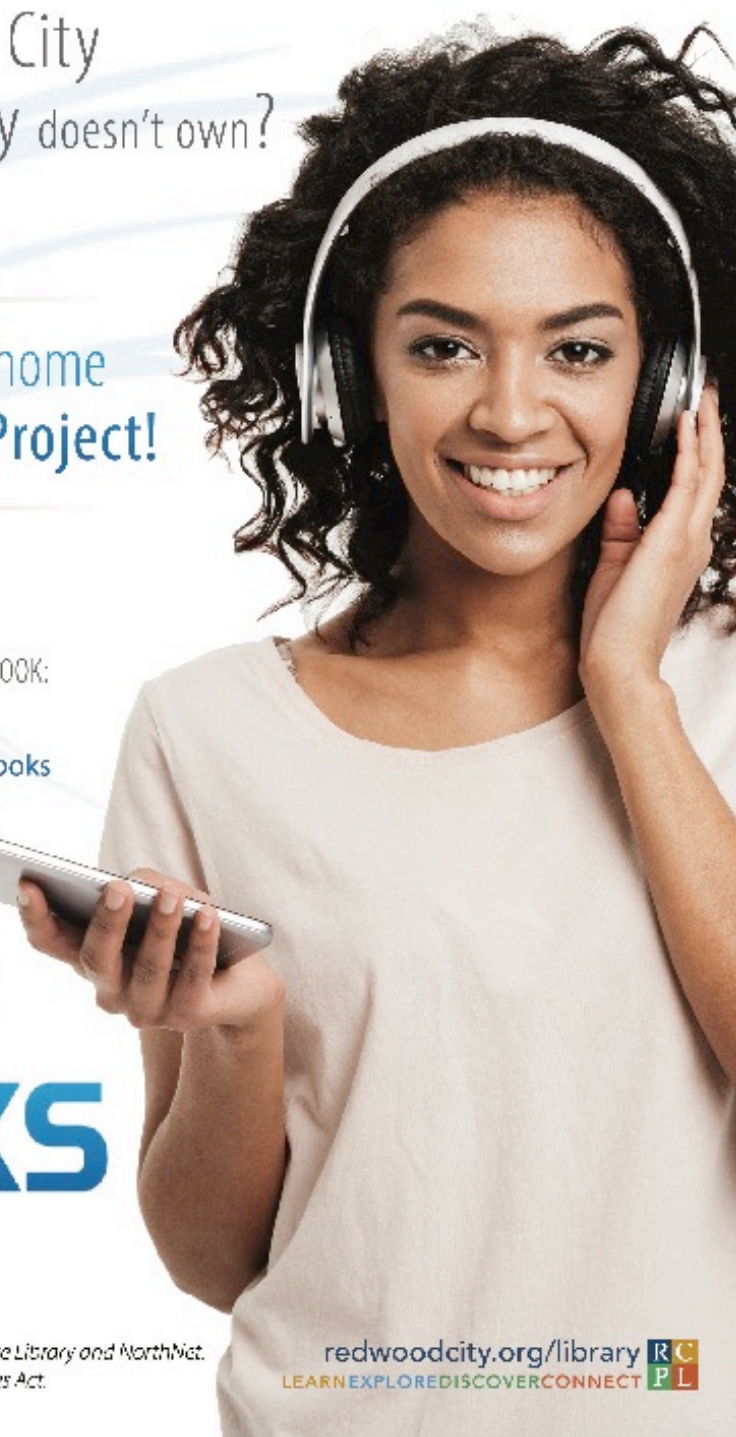
FILL OUT THE FORM ONLINE TO ORDER THE BOOK:

[https://www.redwoodcity.org/
departments/library/services/zip-books](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](https://www.redwoodcity.org/library) 
LEARN EXPLORE DISCOVER CONNECT



Attachment S – Patron information sheet

The following is a simple example of an Excel spreadsheet that can be used to track Zip Books requests during its various stages. Other libraries have also designed more complicated spreadsheets or created an Access database, depending on their own program needs.



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 T – Example Press Release and Article

The following is a sample of a press release created by Lake County to inform patrons about the Zip Books program, as well as a news article that was written up about Santa Maria Public Library.

COUNTY OF LAKE

County Library

1425 North High Street
Lakeport, California 95453

Telephone (707)263-8816
Christopher Veach
County Librarian

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 an audiobook or a large print book through the Zip program. The Zip Books request form is on the Lake County Library's website library.lakecountycalifornia.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](https://www.facebook.com/LakeCountyLibrary). For more information about Zip Books or the library, call 263-8817.

Zip Books: Library looks to expand use by shipping audio, visual materials to readers' doors

By Razi Syed, rsyed@leecentralcoastnews.com

Santa Maria Times

Jan 25, 2019

https://santamariatimes.com/news/local/zip-books-library-looks-to-expand-use-by-shipping-audio/article_32a72bc9-d5fb-51db-a4d0-7dfa8e1cfa9f.html 3/5

One year after introducing Zip Books — a grant-funded program that brings books directly to community members' homes — the Santa Maria Public Library is hoping to expand its use among readers.

The program — which is supported by California Library Services Act (CLSA) funds — allows residents interested in books or audiobooks not held by the library to have the items purchased and shipped to their door, said Joanne Britton, a city librarian who oversees adult reference services and circulation.

“The way it works is when people want a book that we do not have in our library or jurisdiction — meaning Santa Maria or one of the branches — we can use Amazon to order the book to ship directly to their house,” Britton said. “When they’re done using it, they return it to us.”

The library — which has branch locations in Santa Maria, Orcutt, Los Alamos, Guadalupe and Cuyama — then decides whether to add it to the collection, offer it to another library or to put it on the shelves of its library bookstore.

Library director Mary Housel said she had realized many regular library attendees were unaware of the service.

“Since Zip Books are funded by a generous California state library grant, we want to be sure we get word out about it,” she added.

From November 2017 through October 2018 — the first year of the grant — the library used around \$9,500 of an \$11,000 grant to purchase 528 titles. For the second year, the library’s spending cap will be \$13,000.

Library staff are working to make sure the program is well-promoted at each of the library’s five branch locations to expand the use of the program, Britton said.

“It’s a decent size amount of money and a good way to get books we wouldn’t have otherwise gotten,” she said. “It’s a form of what we call patron-driven acquisition, meaning our patrons have

some say in the content that comes to the library. There might be a title in a series, for example, that we missed and that would be a good way for us to get a copy of that book.”

Britton said that while acquisitions from the program form a small portion of the library’s acquisitions, it helps fill gaps in the collection and can help to guide its purchasing by signaling the types of books community members are interested in.

“It really is directly from the horse’s mouth what they want. They’re specifically saying, ‘I want to read this.’”

Readers can request any book or audiobook costing up to \$35, although they are limited to one book at a time.

“Most people that use it or learn about it are super happy. Usually titles will be delivered straight to their house within a couple days,” Britton said. “Once people know about it, they’re very much repeat customers.”

For more information or to place an order request, visit the library’s youth services desk, the second-floor information desk or call 805-925-0994.

The library, located at 421 South McClelland St., is open 10 a.m. to 8 p.m. Monday through Thursday, 10 a.m. to 6 p.m. Friday and Saturday and closed Sunday.

Attachment U - Commitment Letter

This is an example of the Zip Books Participant Letter of Commitment that all libraries are required to sign and keep on file.



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: