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Onboarding Toolkit Working Group

This toolkit would not be possible without the help of the following Onboarding Toolkit Working Group members:

- Henry Bankhead, San Rafael Public Library
- Jacquie Brinkley, NLS, Zip Books Project Manager
- Carol Frost, PLP, Chief Executive Officer
- Mercy Nuesca, NLS, Zip Books Project Coordinator
- Derek Stalcup, Ventura County Library

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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 to 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.
What is the Onboarding Toolkit?

The Onboarding Toolkit is a resource designed to assist new program libraries in setting up their local Zip Books program.

The toolkit is organized into six sections that walk libraries through an introduction of Zip Books and the four major phases of implementing their local program:

*Phase 1 – Getting Started*
*Phase 2 – Program Setup*
*Phase 3 – Program Launch*
*Phase 4 – Program Management*

Supporting and example documents are included at the end of the toolkit. Additional information and resources can be found on the Zip Books website at: https://northnetlibs.org/zip-books/.

This toolkit was created with the goal of making Zip Books a more efficient and sustainable program. Portions of this toolkit were pulled from the “Getting Started with Zip Books” document and expanded with the input and guidance of the State Library and the Zip Books Advisory Committee. While every effort has been made to cover the various steps involved with setting up a Zip Books program, some library jurisdictions may be required to complete additional steps as dictated by their Library Board or funding agency. The Zip Books Project Coordinator is always available to assist, if needed.
What is the timeline for launching your program?

This provides an example of a typical timeline from the first steps to the launch of your program and the estimated time it may take to complete the various phases. It is important to note that this presents a best-case scenario and is in no means a set schedule. Local library requirements or unexpected issues can sometimes arise that may cause delays in getting your program launched. Also note that some steps overlap and can be worked on concurrently.
PHASE 1:

Getting Started

This section deals with the first few steps after a library has been selected to join the statewide Zip Books program.

Photo courtesy of Christian Koszka, FreeTime Productions
Congratulations, you’ve been selected to be a Zip Books Library! So, what’s next?

Step 1: Complete paperwork

The following required paperwork must be completed before you can begin building your Zip Books program.

Certification of Funding
Once your library has been notified of your acceptance into the Zip Books program, the program administrators will work with the California State Library to determine your annual allocation. You will then be notified of your allocation by email and also receive an electronic letter from the State Library confirming this allocation. The box below provides a brief explanation of the various factors taken into consideration when determining your annual allocation. For example, funding is awarded on a 12-month basis from July through June, but allocations will be pro-rated if a library joins the program after the start of a new fiscal year. Libraries are encouraged to remain within their allotted budget, but supplemental funds may be awarded on an as needed basis depending on the total amount of funds available for program expenditures.

Letter of Commitment
After your Certification of Funding letter is received, you will be asked to sign a program commitment letter that spells out some of your responsibilities as a participating library, such as ensuring that staff members are familiar with and follow program policies and procedures. A sample of this letter is included in the Supporting Documents section, under Attachment A. The form will need to be signed by your Library Director and Designee (if a Zip Books Coordinator has already been designated at that time), scanned, and emailed to the Zip Books Project Coordinator. The signed hard copy should remain on file at your library.

Allocation Considerations
Your annual allocation is determined by the California State Library and NorthNet Library Systems using the following factors: a library’s certified population, the total amount of grant funds available for expenditures, funding period, past spending patterns (if available), anticipated future spending patterns, and additional considerations.
Step 2: Build Your Team

The success of any program relies on the hard-working library staff who help to run and implement it, so the next step to getting your program started is building your Zip Books team.

**Zip Books Coordinator**
The first point listed in the Zip Books Letter of Commitment 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 there are any changes to the staffing assigned to your program, you should notify the Zip Books administrative team as soon as possible.

**Zip Books 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. Also, in the unfortunate incident of an unexpected staff change, this will ensure that there is at least one other person at your library who is familiar with the program policies and procedures and can help with the transition. As previously mentioned, depending on your library’s staffing size and availability, it may also be possible to appoint different staff members or departments to manage the various aspects 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 you go through the process of setting up and managing your program, you may find that you need to adjust your support staffing so it’s good to keep in mind that your Zip Books team is not permanent but always evolving.
Step 3: Get Connected

Although you’ll be running your program “independently”, you’re still a part of the larger Zip Books Project family. Staying connected with your fellow Zip libraries and the project administrative team ensures that you’re up-to-date on program news and changes and taking advantage of the available resources.

Monthly Email List
The Zip Books administrative team understands the importance of communication and uses various means to promote open discussion between programs and project administration. One such method used is the monthly emails that are sent out to all the participating libraries sharing Zip Books news and reminders. Be sure to 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 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.

Listserv
Another form of communication employed is the Zip Books Listserv, which allows participating libraries to connect with one another, ask questions of your peers, and also share Zip Books Discards lists (those items that are not chosen for inclusion into a library collection). 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.

Photo courtesy of Christian Koszka, FreeTime Productions
**Mentorship Program**

The Zip Books Project Coordinator is always available to assist with any issues or questions that arise during the building and managing of your program. However, sometimes it is more valuable and effective to talk with other library staff who have on-the-ground experience with daily Zip tasks. With so many other Zip Books programs across the state it can be difficult finding and connecting with another library, so as another resource Zip Books offers a Mentorship Program that pairs you with a participating library.

The goal of the Zip Books Mentorship Program is to connect new, incoming libraries with veteran libraries in order to facilitate a beneficial exchange of knowledge and experience. Mentoring libraries will help to guide new libraries through the process of building and launching their local programs and serve as another resource for questions and guidance. At the start of the process, the program administrators will automatically match you with an experienced library of similar size and setting. An initial email will be sent introducing you to your mentor library and providing you with their contact information, but it will be up to you to reach out to them for assistance. However, if there are any questions or issues that cannot be answered/resolved by your mentor library they should be forwarded to the Project Coordinator.

If you have not been matched with a mentor library or if you wish to become a mentor library, contact the Zip Books Project Coordinator.
PHASE 2:

Program Setup

This section details the various steps involved in setting up your local Zip Books program. Many of these steps can be completed concurrently by your team. Additional steps may be needed depending on your library’s own protocols.

Photo courtesy of Christian Koszka, FreeTime Productions
Now that you’re officially a Zip Books Library, you can now begin building your program.

Steps 4 and 5: Amazon Procedures

Currently, all Zip Books ordering is processed through the Amazon website, so there are various aspects that will need to be set up. For step-by-step instructions on how to achieve these steps see the “Zip Books Amazon Account Procedures” document included in the Supporting Documents section as Attachment B. You should notify the Zip Books Project Coordinator when you have completed the Amazon procedures.

Standard 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. It is recommended that you open a Standard Amazon account versus a Business account because the Prime membership is somewhat lower, and you don't have to pay an annual account fee. However, Amazon does set a 500-name limit for the address book with a Standard account and will randomly delete names once you have reached this limit unless you routinely purge your addresses once and a while. A Business account does not have this limit. If you do choose to set up a Business account, please note that your library will need to pay for the additional fees out-of-pocket as they are not covered by the grant at this time. It is also recommended that you use a Zip Books dedicated email address to open your Amazon account so that multiple team members can have access to the account and receive notifications from Amazon if there are any issues with orders. 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.

Amazon Corporate Credit Line/NLS Credit Card

Once your Amazon Account is set up, your library will need to apply for an Amazon Corporate Credit Line or ACCL so that the materials ordered are billed to the account. This process can take a few weeks, so we recommend getting started on this as soon as possible. Note: your library will not need to pay any bills. You’ll scan and email all invoices to NorthNet at ZipBooksInvoice@northnetlibs.org and they'll pay them for you.
Some libraries may need to get approval from their city/county or governing board in order to apply for an ACCL or may need the assistance of their Accounting or Finance Department in completing the ACCL application, so it’s useful to be aware of the protocols your library must follow and the additional time required to complete them. Also, if your library already has an existing credit line, you will need to set up a second credit line that is used solely for Zip Books. This process will require additional time and effort, as you will need to reach out to Synchrony Bank (Amazon’s Corporate Credit Line company) to notify them that you wish to set up a sub-account or “parent-child” account to your existing line. When completing your application, be sure to select the “Pay-In-Full Credit Line” option and NOT the “Revolving Credit Line”, which is their credit card option. You’ll want to complete your application as a government entity or non-profit organization, not as an individual. If late fees are accrued, Synchrony Bank will usually waive the fees for such organizations.

Should your library be unable to set up a credit line or should your application be denied, there is a backup option available. This option involves NorthNet issuing your program a credit card for Zip Books use only. The credit card will be a sub-account of NorthNet and is issued under your Library Director’s name. A user agreement will need to be completed and it takes about three weeks for the paperwork to be submitted and approved by US Bank. If your library is having any issues with setting up a credit line or if you wish to explore this backup option, do not hesitate to contact the Zip Books Project Coordinator.

**Annual Prime Membership**

Lastly, you’ll need to subscribe to Amazon Prime in order to take advantage of the free two-day shipping. There are two options on how to do this, which are explained in STEP 4 of the “Zip Books Amazon Account Procedures” document (see Attachment B). Once your Prime membership is established, you’ll want to make note of the expiration date as your membership will need to be renewed each year. Note that the cost of your standard Prime membership (new or renewal) is covered by the grant and does not come out of your allocation. Renewal procedures are also included in the “Zip Books Amazon Account Procedures” document. Should your program choose to pay for your annual Prime membership using a library credit card, a claim form can be submitted to the NorthNet Fiscal Department for reimbursement (see Attachment C). The “Amazon Prime Fee Reimbursement Claim Form” should be submitted AFTER the Prime fee has been charged to the account to ensure that the correct amount is reimbursed. The “Zip Books Expense Reimbursement Request Form” should be used for all other reimbursements, which are further discussed in the “Invoicing” section (see PHASE 4: Program Management). For libraries with an Amazon Business Account, only the cost for a standard Prime membership will be reimbursed. All other fees must be covered by your library.
Steps 6 - 9: Internal Documents and Procedures

Concurrent with completing the Amazon procedures, you will also need to develop some internal documents and processes to help guide your Zip Books team and establish the parameters of your local program. You’re encouraged to refer to the Best Practices toolkit to see the practices that other participating Zip Books libraries have put in place. You can find this and other resources on the program website: https://northnetlibs.org/zip-books/.

Zip Books Purchasing Policies
While libraries are given the flexibility to determine processes and policies that best suit their needs, there are certain policies and “best practices” that are set forth by the State Library and NorthNet, 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 the best customer service.

Local Program Policies and Procedures
To ensure that your program is run smoothly and consistently, we suggest developing procedural documents for the library staff who will deliver the service. Procedures should inform staff of cost limits per item ($50 pre-tax for books, $75 pre-tax for audiobooks and foreign language items), loan periods, number of items patrons can request at a time/per month (maximum limit of 5), instructions on how to track items via Excel or other means, and instructions on how to process returned items. Policy documents can also be created as reference for staff regarding local policies, such as limits on patron eligibility due to past violations of program policies and procedures or residency outside your library jurisdiction. These procedural documents may need to be updated on a regular basis as program policies and procedures change. Sample staff procedures from Kings County Library, Lake County Library, and Mendocino County Library are shown in the Supporting Documents section of this toolkit (see Attachment D).
Staff Instructions/Training

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 the basic outline of their order process, Lake County Library has also created a “Zip Books Flowchart” as part of their training materials (see Attachment F). 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).

Prior to launching your program, you'll also want to make sure that ALL of your library staff are familiar with the Zip Books 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 members who are designated to be a part of your Zip Books team will, of course, require additional training. We suggest keeping a Zip Books program binder or shared file folder to house all instructions and program documents, including this Onboarding Toolkit and the Best Practices toolkit, and updating them once a year. That way, any new staff member can easily learn about the program and its procedures by simply reviewing the materials included in the program binder or folder. Again, this will help to ensure your program will run smoothly and consistently, even if there are staff changes.

Tracking Tool

All libraries are required to develop a tool, such as an Excel spreadsheet, to internally track Zip Books and keep record of all your program orders and activities. Suggested platforms include Excel, SharePoint, and Google Sheets. 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. It can also be used to continuously track spending and make notes regarding past orders or patron issues, such as when patrons claim an item was not delivered to them and must be reordered or sent to another acceptable address. This internal tracking system should also be used to gather...
statistical data that your library will be required to report on a regular basis (this is further covered in PHASE 4: Program Management under “Reporting”). 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 can be found on the Zip Books website at: https://northnetlibs.org/zip-books/.

Zip Books Request Forms
Your patrons will need a way to submit their Zip Books requests, so a printed and/or online patron request form should be created. Sample print request forms are available in the Supporting Documents section (see Attachment H). 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. San Rafael Public Library has also created a bilingual online form for their patrons (http://srpubliclibrary.org/booklovers/zip-books/zip-books-order-form/), which we recommend also doing as a way to reach out to Spanish-speaking patrons. You could also 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 as an option, 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.

Patron Notifications
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. Staff will also create a gift message for the patron when ordering the book on Amazon. 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 Integrated Library System or Library Management System to provide friendly reminders to patrons regarding outstanding Zip items.

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. Sample email and gift message wording are shown in Attachment I 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.
Step 10: End Processing

Depending on your library’s normal end processing policies, you may need to discuss this stage of the procedures with your Selection Librarian or Cataloging Department to determine how your library will incorporate Zip Books items once they are returned to your library. The Best Practices toolkit showcases some of the end processing practices that other participating Zip Books libraries have put in place. You can find this and other resources on the program website: https://northnetlibs.org/zip-books/.

Selection

When a patron returns a Zip Book item, library staff must then decide whether to add it to their library collection according to their normal selection process. Alternatively, a library may elect to take the easy route of automatically adding ALL Zip Books items. 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 (ZIPBOOKS@LISTSERV.PLPINFO.ORG) or offered to other participating libraries within your consortium. If an item still remains unclaimed, it can then be donated to your Friends of the Library for resale or discarded by other means. To help streamline the process, Mendocino County developed a form for staff that flags a returned Zip Book (see Attachment J).

Note that some libraries may choose to determine the suitability of an item at the beginning of the Zip Books 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” asks that libraries exercise judgement when ordering items such as textbooks and study guides, or items of higher cost. It is always good to make sure that these items 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.

No matter when this is done, it is important that the final status of a Zip Books request/item be noted in your internal tracking tool as the California State Library does require libraries to track the total number of Zip items added to a library collection each month. This is further discussed in the “Reporting” section of PHASE 4: Program Management.

Cataloging

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 way that libraries have chosen to address this issue is to assign the item a barcode at the time of ordering and create a temporary bibliographic record. Staff can then checkout the item to the patron so that it shows up as a library checkout in their 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 library’s online catalog. Also, 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 may instead 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 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.

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. However, it is not required to use the provided bookplate and some libraries either create their own or eliminate this step in order to save time. An initial stock of bookplates and other marketing materials will automatically be sent to your library once you have been accepted into the program. Instructions on how to order additional materials are given in the next step, “Step 11: Marketing”. A copy of this bookplate is shown in Attachment N in Supporting Documents. Digital files of this and other marketing materials can also be found on the Zip Books website at: https://northnetlibs.org/zip-books/. In addition to the bookplate, some libraries 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
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 K.
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 Listserv at: ZIPBOOKS@LISTSERV.PLLINFO.ORG. Examples of discard lists are shared in Attachment L. 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 also provide instructions on who to contact if a library is interested in a title, what information they should provide you (name, shipping info, etc.), and the deadline to get in contact.
Step 11: Marketing

Now that most of your internal procedures are set up, you’ll want to figure out how to let people know about the Zip Books program. The most successful programs are the ones that take the time and effort to advertise the service and get the word out amongst its patrons and community. This section gives you a brief overview of marketing strategies, but you can find more marketing practices discussed in the Best Practices toolkit, found on the program website: https://northnetlibs.org/zip-books/.

Strategies

There are various marketing strategies that your library can use to promote Zip Books to your patrons and the larger community. These can range from posting the provided marketing materials in your library or developing your own, using social media to advertise the program online, sending an email announcement to all library patrons, creating a press release that can be sent to local papers, having a Zip Books display at your branches, or simply having your library staff talk about the program when a patron comes in looking for a book you may not have. The strategies that you choose to employ will depend on the size of your staff and the resources available to you, but libraries have generally found success promoting and growing their programs by being visible in the library and online, and by word-of-mouth. Here are some of the strategies used by other Zip Books libraries:

- **Marketing Materials**
  - Display the Zip Books poster around the library or create specific Zip Books posters for different sections of the library (audiobooks, foreign-language, children/teen)
  - Include the Zip Books bookmark or postcard in the packet of library information given to new library patrons
  - Adapt the Zip Books bookmark or flyer to include program policies and procedures on the back
  - Adapt the Zip Books flyer to include in your library newsletter,

Photo courtesy of Christian Koszka, FreeTime Productions
Friends of the Library newsletter, or in your City/County’s Parks and Recreation/Activities catalog

• **Library Displays**
  - Create a “What Your Community is Reading” display of items requested through Zip Books, including items of different genre and formats to demonstrate the variety of subjects and materials available
  - Set aside an area in your new or recently returned section for new Zip Books items added to your library collection
  - Attach a Zip Books sticker to the item spine for quick browsing

• **Online Advertising/Social Media**
  - Advertise the program on your library homepage and all social media platforms
  - Develop a Zip Books webpage on your library website that provides all the necessary program information, including an online request form if available
  - Share recently added Zip Books items on social media

• **Word of Mouth**
  - Remind library staff to talk about the Zip Books service and offer it as an option should your library not have an item the patron is looking for
  - Have library staff introduce the service during library events, such as book clubs, story times, conversation clubs, etc.
  - Have library staff introduce the program to patrons who sign up for a new library card
  - Share the program with your volunteers, Friends of the Library, Library Board, or even other Departments in your City/County

• **Collaborate**
  - Identify other library programs that might work well with the service, such as literacy programs, homebound outreach, homework help, etc.
  - Reach out to outside community programs that you could collaborate with to promote and utilize the service, such as family services, afterschool programs, homeschool programs, and more

It’s good to 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. For instance, if your library offers a literacy program, conversation club, or teen club you could make a presentation to those groups and talk about how the service might help them find materials that the library does not carry.

Once the program starts to become known you will eventually build a base of regular users, but there will also always be new groups and new patrons coming into the library, so it helps to stay visible and to continue talking about the program. Perhaps after your first year you might choose to share the success of your program and demonstrate its growth by creating a press release that 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 M in the Supporting Documents section.

Materials
As mentioned before, Zip Books provides promotional material for every participating library that can be used as part of your marketing plan. Besides bookplates, there are also bookmarks, postcards, and posters available to help you get the word out. All materials except the bookplate are available in English and Spanish. Examples of these materials are included in Attachment N 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 Jacque 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.

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

Program Webpage/Information Sheet
As part of your library’s marketing strategy, you should also consider creating a public information sheet or library webpage that describes the Zip Books program and provides information on how patrons can request an item. A sample information sheet is available in Attachment P. Sample Zip Books webpages have been created by many libraries, including Corona Public Library (https://bit.ly/2ZgrLuN), Harrison Memorial Library (https://bit.ly/2ZjtImh),
and Kern County Library (http://www.kerncountylibrary.org/zipbooks/). Links to an online request form are also provided through the webpages, which help make the process of requesting materials quick and easy. For more information on Zip Books Request Forms see the corresponding section in “Steps 6 – 9: Internal Documents and Procedures”. Building a webpage and online form may require the assistance of your tech 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.
PHASE 3:

Program Launch

This section covers testing and launching your local Zip Books program.
Now that you’ve completed setting up your program, it’s time to launch Zip Books.

Is your program ready to launch?

Before launching your program to the public, you’ll want to make sure you have everything necessary in place. However, it’s also useful to remember that you can never fully be prepared, and that unexpected questions or issues will arise. Testing out your program with your staff or a small group might help to lessen these growing pains.

Checklist
The “Zip Books Launch Checklist” (see Attachment Q) was created as a quick and simple tool to determine if your library has the necessary components in place to launch your program, but additional components may be needed depending on your library’s needs and preferences. Using the list as a reference, notify the Zip Books Project Coordinator once your internal procedures and documents are in place and they’ll give you the go ahead to launch your program.

Test Phase
Before officially launching your Zip Books program to the public, consider testing out the process or doing a “soft launch” with personal requests from your library staff and volunteers, or a small group of patrons. This not only gives your library staff the opportunity to become familiar with the procedures, both as a patron and staff member, but also gives you the time to work out any kinks on both sides of the system. Some libraries might also choose to quietly launch their program to see how things go, then will “officially” launch things after a month or two.

Similarly, you could establish a “trial period” for your patrons in which they are limited to only one Zip Books 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 may help to ensure that your patrons fully comprehend the program policies and procedures so that there are fewer issues with lost or unreturned items.

Whether or not you choose to conduct a test phase or implement a trial period, it’s 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. For example, some libraries choose not to set a borrowing limit on Zip Books when they are first requested or allow patrons to have their requests checked out for an extended period of time (6 months – 1 year). While this may be useful for some systems and patrons may enjoy the lack of time constraint, you may later find that this results in fewer items being returned and added to your library collection for others to enjoy. As a result, you might consider shortening the borrowing period to match a typical library book but allowing them more renewals.

Adjustments are to be expected as you learn what works best for your library and what does not, just be sure to 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.

It is also useful to remember that Zip Books is not meant to replace your normal ILL, holds service, or collection development process. Instead the program is intended to supplement your existing library services and provide your patrons with another option to explore in trying to find the materials they need. For instance, you might find that patrons would rather not order items from Amazon or have library items delivered to their home. In which case, you might consider redirecting these patrons to alternative resources like ILL, or arrange for their Zip Books to be anonymously delivered to their local library branch using their library card number as a reference. Zip Books is just another feather in your library’s cap, so to speak, and an additional level of customer service that your library is able to provide to your community.

**Launch**

Once you have confirmed that you have all the necessary components in place, and perhaps even conducted a test phase, your library is ready to officially launch its Zip Books program. It may be that the response is quick, and requests start to roll in after a few days, or it may be some time before for your program takes off. If the latter, don’t give up! Continue talking about the program with your library staff and encouraging them to share it with your patrons and even their family and friends. Eventually, word will get out and slowly but surely your program will grow and hit its stride.

As you begin processing Zip Books reports, you’ll move on to the next phase of managing your program.
PHASE 4:
Program Management

This section deals with the continued management of your Zip Books program and the reporting requirements as specified by NorthNet and the State Library.

Photo courtesy of Christian Koszka, FreeTime Productions
Now that you’ve launched Zip Books, you’ll need to continually manage your program to ensure its success.

Ongoing steps: Managing Zip Books

*There are various aspects to managing your program that your library will need to do on a monthly basis. This may require the assistance of additional staff, such as your Accounting Department.*

**Budgeting**

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, but while there may be funds available, it is not always guaranteed. 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 to make policy adjustments if necessary. 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.

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 staff to know, but it may also be useful for your patrons to know. Siskiyou County Library has made the unique choice to keep their patrons updated on their annual budget via their Zip Books information page ([https://www.co.siskiyou.ca.us/library/webform/zip-books](https://www.co.siskiyou.ca.us/library/webform/zip-books)) so that patrons are aware of the funds available and are more conscientious of the types of requests they submit.
Any questions regarding your allocation or requests for additional funds can be forwarded to the Zip Books Project Coordinator.

**Invoicing**

Library spending is also monitored by NorthNet’s Fiscal Department, who manages the payment of all Zip Books invoices so that your library will not have to submit any payments yourself. However, you may need to submit invoices and additional documentation as needed to them. Complete invoicing instructions are included in the “Zip Books Invoicing Procedures” document, which you can find in the Supporting Documents section as Attachment R, or on our website: https://northnetlibs.org/zip-books/.

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 will be taken from your allocation. Hard copies 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 S.

If your library was issued an NLS credit card, then your monthly statements are sent directly to NorthNet instead of your library. However, you will need to submit an Amazon-generated Order History report to ZipBooksInvoice@northnetlibs.org for review before your payment can be processed. Instructions on how to generate this report can be found in STEP 8 of Attachment R and an example of what this report should look like is seen in Attachment T.

Occasionally, your library may need to get reimbursed for a Zip Books expense, such as the cost for the Amazon Prime Membership fee or for orders accidentally charged to the wrong account. For reimbursements, complete one of the designated Zip Books claim forms (see Attachment C) and submit to ZipBooksInvoice@northnetlibs.org for processing. Along with the signed completed claim form, you will also need to submit a PDF file of the Order Details, which verifies the item(s) purchased and the amount charged. An example of an Amazon Order Detail can be found in Attachment S.

Any questions regarding invoicing should be forwarded to the Zip Books Project Coordinator.

**Reporting**

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. Detailed reporting instructions are provided in the “Zip Books Reporting Procedures” document (see Attachment U). A screenshot of the reporting form is shown in Attachment V, and a sample completed form is
shown in **Attachment W**. All three documents are available on the Zip Books website: https://northnetlibs.org/zip-books/.

Efforts have been made to keep the statistical reporting at 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 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 the administration team 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. Further instructions on the annual statistics reporting are provided in the “Zip Books Reporting Procedures” document (see **Attachment U**) and will be clarified via email communications.

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 spreadsheet. This will not only help you track these statistics easily so that less time is spent on program reporting and more on processing, but it creates a one-stop-shop for all your Zip Books tracking needs, including requests, budgeting, and statistics. For additional information, see the “Tracking Tool” section found under “Steps 6 - 9: Internal Documents and Procedures”.

**Program Support**

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 Project family and that support is available if needed. The Zip Books Project Coordinator can always be reached via email or phone if assistance or guidance is needed at any point. Additional support can also be found with your fellow Zip Books libraries, who can be contacted via the Zip Books Listserv. To post a question or request feedback, simply send an email to: ZIPBOOKS@LISTSERV.PLINFO.ORG. Whatever the situation, don’t hesitate to reach out!

Furthermore, program tools, such as this Onboarding toolkit and the Best Practices toolkit, are always being developed and updated to assist Zip Books libraries throughout the various stages of running their Zip Books program. These tools and resources are shared through the Zip Books mailing lists, and also made available through the Zip Books website: https://northnetlibs.org/zip-books/. The Zip Books Administrative team is also open to hearing suggestions on how they can improve procedures and better support programs. Ideas and suggestions can be forwarded to
the Zip Books Project Coordinator via phone or email. You may also have the opportunity to share your ideas in-person during the annual Zip Books General Meeting that is held at the CLA Conference each year. It’s a great opportunity to network with your fellow Zip Books libraries, but if you can’t make it the Zip Books Open Forum is another place to learn from and connect with your administrative team and peers. These meetups are hosted online a few times each year through the Zoom platform and attendees can join in online through the app or by calling in. The Open Forums are also recorded and can be viewed at a later date. Links to these recordings and meeting notes can be found on the Zip Books website: https://northnetlibs.org/zip-books/.
Supporting Documents

Attachments and Examples

The various documents included here were created by Zip Books Administration 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 - 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://northnetilbs.org/zip-books/) and as communicated via listserv and e-mail by the project grant monitor at the State Library and the project coordinators at NorthNet.

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

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

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

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

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

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

Director Name: __________________________________________________________

Director Signature: ______________________________________________________

Designee Name: _________________________________________________________

Designee Signature: _____________________________________________________

Date: Library:
Attachment B – Amazon Procedures

The most updated Amazon Account Procedures can be found online at https://northnetlibs.org/zip-books/

Zip Books Amazon Account Procedures

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

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

2. Apply for an Amazon.com Corporate Credit Line – Pay-In-Full Credit Line
   a. If this is your library’s first Amazon Corporate Credit Line, go to: https://www.amazon.com/gp/cobrandcard/marketing.html?ie=UTF8&pr=ibprox
   b. If your library already has an existing credit line used for various purposes, you will need to set up a second credit line that is used solely for Zip Books (skip to STEP 3).
   c. Choose the Pay-In-Full Credit Line option (NOT the credit CARD option).
   d. Use the same account information used for the standard Amazon account created for the Zip Books project (using the same email address and password as the Amazon account used
for Zip Books will ensure the Amazon Corporate Credit Line is linked to your standard Amazon account created for the Zip Books Project).

e. Follow the instructions on the Amazon Corporate Credit Line (ACCL) site and fill out the online application form as instructed within.

f. Once the ACCL is approved and created by Amazon it will automatically link to your standard Amazon account used for Zip Books as an available payment method.

g. Set Amazon Corporate Credit Line as your default payment method in your Zip Books Amazon account (should be the only available payment method listed in this account).

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

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

3. **Apply for a second Amazon Corporate Credit Line:**

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

   b. To reapply for a second Pay-in-Full Credit Line with Amazon, go to: https://www.amazon.com/gp/cobrandcard/marketing.html?pr=ibprox&inc=poinv&place=marketing&plattr=GNO_CCL

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

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

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

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

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

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

   a. **OPTION 1 - Purchase an Annual Prime Membership using your library’s own credit card or your NLS Credit Card (if issued one).** For reimbursement, complete the “Amazon Prime Fee Reimbursement Claim form” (available on the Zip Books website) and submit to ZipBooksInvoice@northnetlibs.org along with the order invoice once the payment goes through. Once done, be sure to remove your library’s credit card from your Amazon account to prevent any other accidental charges. Libraries with an NLS credit card do not need to submit a reimbursement claim form.
b. **OPTION 2 – Request a gift membership from NorthNet.** If you are unable to accommodate Option 1 above, notify the Zip Books Project Coordinator and we will provide you with a Prime gift membership. We will need to know the exact date your Prime Membership expires and the email address where to send the gift membership. We will not be able to send the gift membership to another email address once it’s already been purchased.

c. Note that Amazon does not allow you to pay for your Prime membership using your Corporate Credit Line due to the different billing periods.

d. The cost of Prime membership (new or renewal) is covered by the grant and does not come out of your allocation.

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

5. **Renew your Prime membership**

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

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

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

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

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

   f. Once renewed, please notify the Project Coordinator of your new expiration date and the total amount paid for tracking purposes.
Attachment C – Reimbursement Forms

The following two claim forms can be submitted to the NLS Fiscal Department in order to get reimbursed for Zip Books fees, including Amazon Prime Membership fees and Zip Books orders accidentally charged to the wrong account.

California Library Services Act (CLSA)
ZIP BOOKS PROJECT

AMAZON PRIME FEE REIMBURSEMENT CLAIM FORM

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

Please type or print clearly:

Date of Request _____________________

AMAZON Prime Membership Fee: $____________________

Library Name:______________________________________________________

Address: ___________________________________________________________

Phone #: ___________________________________________________________

Signature:_____________________________ Date:_____________________
(Signature Required)

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

PLEASE USE THIS DOCUMENT FOR ONLY AMAZON PRIME MEMBERSHIP FEE REIMBURSEMENT
California Library Services Act (CLSA)

ZIP BOOKS PROJECT

ZIP BOOKS EXPENSE REIMBURSEMENT REQUEST FORM

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

Please type or print clearly:

Date of Request ____________________

Zip Books Expense To Be Reimbursed: $ ____________________

Attach Amazon Paid Order Receipts.

Library Name: __________________________________________

Address: ______________________________________________

Phone #: _______________________________________________

Signature: ____________________ Date: _______________

(Signature Required)

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

12/27/18 ZB Req Version No. 1

Updated 1/29/20
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.
Onboarding Toolkit

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.
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
   type mzip, collection ill, checkin note “SEND BACK TO UKIAH (#*)”
13. Add info to excel spreadsheet
14. Email note or call patron
15. File the email

Amazon.com Gift Note

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

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

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

Thank you and enjoy!
Attachment 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”.

Updated 1/29/20
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”.

<table>
<thead>
<tr>
<th>Full name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Address line 1:</td>
<td></td>
</tr>
<tr>
<td>Address line 2:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>State/Province/Region:</td>
<td></td>
</tr>
<tr>
<td>ZIP:</td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td>United States</td>
</tr>
<tr>
<td>Phone number:</td>
<td></td>
</tr>
</tbody>
</table>

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

**Weekend delivery:**
- Which days can you receive packages?

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

- Use as my default address.

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

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

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

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

11. Select “Save gift options and continue”
12. Make sure the FREE Two-Day Shipping is selected.

13. If all information is correct, select “Place your order”
14. Update Zip Books Requests spreadsheet:

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

15. Send email to customer, update arrival date.

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

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

16. Relocate customer request email to the “Completed Requests” folder.
Attachment F – 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 outline 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  
   - NO. Suggest interlibrary loan to the patron.  
   - YES. Proceed below.

6. Amazon: Is the price more than $35.00? REVISE  
   - NO. Proceed below.  
   - YES. Ask Zip admin for permission to order.  
   - NO. Proceed to ordering.  
   - YES. Proceed to ordering.

7. OCLC Connexion: Is there a bibliographic record for the book?  
   - NO. We can’t order. ILL probably won’t work either. Notify patron.  
   - YES. Proceed below

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.

    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 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.

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Title</th>
<th>Author</th>
<th>Format Type</th>
<th>Book/Genre</th>
<th>Language</th>
<th>Date Requested</th>
<th>Service</th>
<th>Arrival</th>
<th>Item Cost</th>
<th>Email Sent/Called</th>
<th>Return Date</th>
<th>Added/FOL/Other Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alice Johnson</td>
<td>The Great Gatsby</td>
<td>Jordan</td>
<td>Book</td>
<td>AD FIC</td>
<td>English</td>
<td>4/10/18</td>
<td></td>
<td>4/15/18</td>
<td>$29.99</td>
<td></td>
<td>5/15/18</td>
<td>FOL</td>
</tr>
</tbody>
</table>

The remaining budget is $14,000.00.
Attachment H – 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.

<table>
<thead>
<tr>
<th>ZIP BOOK REQUEST</th>
<th>Patron Name/Branch: __________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron ID:</td>
<td>Date: __________________ Phone: (_____) ______</td>
</tr>
<tr>
<td>Address:</td>
<td>Email: ______________________________________</td>
</tr>
<tr>
<td>Title:</td>
<td>Author: ______________________________________</td>
</tr>
</tbody>
</table>

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

Category:
- _____ Adult Fic  Bestseller  Yes  No  _____ Children's Fic  Bestseller  Yes  No
- _____ Adult Non-Fic  Bestseller  Yes  No  _____ Children's Non-Fic  Bestseller  Yes  No
- _____ YA Fic  Bestseller  Yes  No  _____ Foreign Lang Fic  Bestseller  Yes  No
- _____ YA Non-Fic  Bestseller  Yes  No  _____ Foreign Lang Non-Fic  Bestseller  Yes  No
- _____ Other (List) _________________________________________________________

Fill in below as applicable:

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

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 I – 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 [Name],
Please return this note & your ZIP BOOK - FATAL SCANDAL - to a library employee. This book is checked out to you, due 12/19/19.
Barcode: 35253002770398 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.*

<table>
<thead>
<tr>
<th>Item</th>
<th>jmc</th>
</tr>
</thead>
</table>

Title  
Author  
Call Number  
Library Barcode  
Charges  
Due Date

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

Updated 1/29/20
Please return this notice and the book to a library employee.
Attachment J – 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 K – 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/.

<table>
<thead>
<tr>
<th>Zip Books Libraries by Cooperative System</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NorthNet Library System</strong></td>
</tr>
<tr>
<td>Alpine County Library &amp; Archives</td>
</tr>
<tr>
<td>Butte County Library</td>
</tr>
<tr>
<td>Colusa County Free Library</td>
</tr>
<tr>
<td>Del Norte County Library</td>
</tr>
<tr>
<td>El Dorado County Library</td>
</tr>
<tr>
<td>Folsom Public Library</td>
</tr>
<tr>
<td>Humboldt County Library</td>
</tr>
<tr>
<td>Lake County Library</td>
</tr>
<tr>
<td>Lassen Library District</td>
</tr>
<tr>
<td>Lincoln Public Library</td>
</tr>
<tr>
<td>Mendocino County Library</td>
</tr>
<tr>
<td>Modoc County Library</td>
</tr>
<tr>
<td>Mono County Free Library</td>
</tr>
<tr>
<td>Nevada County Library</td>
</tr>
<tr>
<td>Orland Public Library</td>
</tr>
</tbody>
</table>

| Pacific Library Partnership               |
| Harrison Memorial Library                 | Pacific Grove Public Library |
| Los Gatos Public Library                  | Redwood City Public Library |
| Monterey County Free Library              | Salinas Public Library |
| Monterey Public Library                   | San Benito County Free Library |

| 49-99 Cooperative Library System         |
| Amador County Library                     | Stanislaus County Library |
| Calaveras County Library                  | Tuolumne County Library |

| San Joaquin Valley Library System        |
| Kern County Library                      | Merced County Library |
| Kings County Library                     | Tulare County Free Library |
| Madera County Library                    |                         |

| Black Gold Cooperative Library System    |
| Blanchard / Santa Paula Public Library   | Paso Robles Library |
| District                                | San Luis Obispo City - County Library |
| Goleta Valley Library                   | Santa Barbara Public Library |
| Lompoc Public Library                   | Santa Maria Public Library |

Updated 1/29/20
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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 L – Zip Books Discards Lists

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.

<table>
<thead>
<tr>
<th>Zip Books available from Shasta Public Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Blink</td>
</tr>
<tr>
<td>A Ringing Glass: The Life of Rainer Maria Rilke</td>
</tr>
<tr>
<td>A Warmth in Winter</td>
</tr>
<tr>
<td>Blue Gold</td>
</tr>
<tr>
<td>Horse of a Different Color: Reminiscences of a Kansas C. Moody, Ralph</td>
</tr>
<tr>
<td>How to Train Your Viking (by Toothless)</td>
</tr>
<tr>
<td>INF 101</td>
</tr>
<tr>
<td>Lake Shasta Caverns</td>
</tr>
<tr>
<td>Preston Bound</td>
</tr>
<tr>
<td>Real Ponies Don’t Go Dinkl</td>
</tr>
<tr>
<td>Seven Days to Confidence: Practical Strategies to Train Taylor, Ros</td>
</tr>
<tr>
<td>The Chocolate Touch</td>
</tr>
<tr>
<td>The House of Mirrors (Ulysses Moore #3)</td>
</tr>
<tr>
<td>The House of Mirrors (Ulysses Moore #4)</td>
</tr>
<tr>
<td>Teach Like Finland: 33 Simple Strategies for Joyful Clai</td>
</tr>
<tr>
<td>The Testament of Jesse Lamb: A Novel</td>
</tr>
<tr>
<td>Tolkiens Failed Quest</td>
</tr>
<tr>
<td>Wolf to the Slaughter</td>
</tr>
<tr>
<td>How to Write a Movie in 21 Days</td>
</tr>
<tr>
<td>No Promises in the Wind</td>
</tr>
</tbody>
</table>
Attachment M – Example Press Release

The following is a sample of a press release created by Lake County to inform patrons about the Zip Books program.

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 a audiobook or a large print book through the Zip program. The Zip Books request form is on the Lake County Library’s website library.lakecountyca.gov under the “Books and More.

Requested books that meet the Zip Books program criteria are ordered by the library and shipped to the patrons’ mailing addresses. Each book is checked out to the borrower and has a due date. The patrons are expected to return the books to the library. Upon return, most Zip Books are accessioned into the library catalog and receive a special Zip Book bookplate.
Zip Book patrons have diverse tastes and interests, all of which contributes to the diverse mix of titles for adults and children that have been added to the library. In non-fiction, subjects include history, religion, fishing, woman suffrage, cooking, knitting, science and current events. In fiction, the library has added mysteries, science fiction, graphic novels, romance novels and general fiction.

Carolyn Brooks, California State Library Project Monitor says, “The goal of the Zip Books Project is to expand the use of an alternative model for interlibrary loan service that, over time, has proved cost effective, easy to use, and extremely popular with the public. The project started in 2013 with 15 libraries; currently over 68 library jurisdictions across the state are participating, with more being added all the time.”

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

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

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 N – Marketing Materials

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

...Your Library. Delivered.
Ask how to get books or audiobooks mailed directly to you!

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

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

Zip Books es un proyecto a nivel estatal del Sistema de Bibliotecas de NorthNet, financiado por la Biblioteca Estatal de California.
...Your Library. Delivered.
Ask how to get books or audiobooks mailed directly to you!

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Attachment O – Library Marketing Materials

These are additional examples of marketing materials that libraries have 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

Zip Books is a statewide project of the California State Library and NorthNet. The Project is funded by the California Library Services Act.
Attachment P – 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 Q – Launch Checklist

The following launch checklist should be used to make sure your library has everything in place before launching Zip Books.

Zip Books Launch Checklist

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

Should you have any questions, please contact Mercy Nuesca, the Zip Books Project Coordinator at nuesca@northnetlibs.org.

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

- Letter of Commitment signed and returned

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

- Zip Books dedicated Amazon Account created

- Amazon Corporate Credit Line established or NLS credit card issued

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

- Zip Books Marketing Materials received, and promotion strategies developed

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

- Conduct “soft launch” or trial run with library staff requests
Attachment R – 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 S – 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](mailto:ZipBooksInvoice@northnetlibs.org)

   Statements will include the following sample pages

   ![Sample Amazon Invoice](image)

   Code needed to register account online.

   Note: only valid for a short period of time
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)
2) If requested, Order Details for specified purchases should be sent as a PDF file to zipBooksInvoice@northnetlibs.org
Attachment T – 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.
Attachment U – 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.


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 V – Statistics Reporting Form

The following is a screen capture of the Excel spreadsheet form that is used to submit statistics each month.
Attachment W – 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.

<table>
<thead>
<tr>
<th>Library Name: ZIP BOOK LIBRARY</th>
<th>Date Service Launched (first year): October 2018</th>
<th>Month: April</th>
</tr>
</thead>
<tbody>
<tr>
<td>Running total of first-time Zip Books customers served since launch:</td>
<td>325</td>
<td>Note: Additional statistics required during the month of April (see box below)</td>
</tr>
<tr>
<td>Number of Zip Books added to library collection this month:</td>
<td>164</td>
<td>Total of new customers served over time with each individual counted only once (this running total may increase each month)</td>
</tr>
<tr>
<td>Comments/Feedback (optional):</td>
<td></td>
<td>Discarded titles given to other Zip Books libraries should be counted by the receiving library as added to library collection; count items added to the collection during the month whether or not it was purchased that month or a previous month</td>
</tr>
</tbody>
</table>

Customer comment: "Our whole family is a fan of the Zip Books program!"

Include any comments or feedback from patrons and library staff regarding the Zip Books program, policies, procedures, etc.