Onboarding Toolkit

VERSION 2.0
MAY 2021

Getting Started

Set up/ Launch

Management

ACKNOWLEDGEMENTS

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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.

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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/, including the Best Practices Toolkit, End Processing Toolkit and Tracking Toolkits, which libraries are also recommended to review.

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Photo courtesy of Christian Koszka, FreeTime Productions

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 input and guidance from the State Library and the Zip Books Advisory Committee. While every effort has been made to cover the various steps involved in 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.

COMPLETE PAPERWORK
1 week

BUILD ZIP BOOKS TEAM
1 month - ongoing

BUILD CONNECTIONS
1 week - ongoing

PROGRAM ACCEPTANCE
1 - 2 weeks for notification

GETTING STARTED
1 - 4 weeks

1 2 3

PROGRAM SETUP
2 - 5 months

CREATE AMAZON ACCOUNT/ PRIME MEMBERSHIP
1 day

4

ESTABLISH POLICIES/ PROCEDURES
3 - 6 weeks

BUILD TRACKING TOOL
1 - 2 weeks

8 7 6 5

APPLY FOR CORPORATE CREDIT LINE/NLS CREDIT CARD
3 weeks – 2 months

STAFF INSTRUCTIONS/ TRAINING
1 month - ongoing

CREATE REQUEST FORMS/ NOTIFICATIONS
2 - 4 weeks

9

MARKETING PLAN
2 months - ongoing

10 11 12

LAUNCH
3 - 6 months after acceptance

DETERMINE END PROCESSING
1 month - ongoing

TEST PHASE
1 - 2 months

Congratulations, you have been selected to be a Zip Books Library! So, what happens 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 System 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 will 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
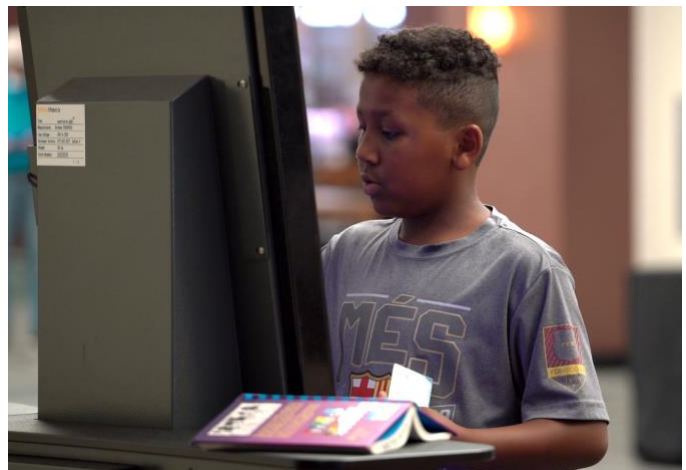an email to: ZIPBOOKS-signoffrequest@LISTSERV.PLSINFO.ORG.

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 are 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 will want to open one unique to Zip Books so that the billing remains distinct from any other materials or supplies that your library 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. 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 out-of-pocket the difference in costs for the Prime membership fees as Amazon Business Accounts 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. Instead you will scan and email all invoices to NorthNet at ZipBooksInvoice@northnetlibs.org and they will 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 is 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 will 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 will 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***). You have the option of using a library credit card to purchase an annual (12 month) Prime subscription and submitting a reimbursement request to the grant, or you can request a Prime Gift subscription from the Zip Books Project Coordinator. 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 annual 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 out-of-pocket.

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 are 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 at https://northnetlibs.org/zip-books-resources/.

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 (see **Attachment D and E**) 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 and shipping for books, $75 pre-tax and shipping 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 F***).

It is recommended that libraries also review the Best Practices Toolkit (available online at: https://northnetlibs.org/policies-and-best-practices/) for a discussion on the best program policies and procedures that libraries have chosen to implement. The End Processing and Tracking Toolkits should also be referenced when determining those specific procedures as they provide more detail and discussion. These additional toolkits can be found online at the same link above.

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 G*** 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 H)***. 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 will 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. You can accomplish this by conducting a soft launch or test phase with just your staff and volunteers. 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,

Photo courtesy of Christian Koszka, FreeTime Productions

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 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, Access, 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" and in the Tracking Toolkit found online at: https://northnetlibs.org/policies-and-best-practices/). An example of a simple tracking spreadsheet is included in *Attachment I*. 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 will 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/policies-and-best-practices/.

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 J*). 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://bit.ly/3lwm43Y. 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/3g6zDoN. Examples of additional request forms can be found on the various informational webpages shared on our website at https://northnetlibs.org/program-webpages/.

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 K* 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 libraries have put in place. The End Processing Toolkit also provides a discussion of some of the pros and cons for different procedures. You can find both toolkits and other resources on the Zip Books resources page: https://northnetlibs.org/zip-books-resources/.

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, choosing to weed items at a later date. 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 L**).

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" (see **Attachment D**) 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 F*). 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 Q* in Supporting Documents. Digital and customizable files of this and other marketing materials can also be found on the Zip Books website at: https://northnetlibs.org/printed-marketing-materials/. You are welcome to adapt the provided files as needed, just as Lake County Library did by creating mini bookplates (see *Attachment R*). 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.

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 (CLS) can be found in **Attachment M.** Contact lists for your CLS can be requested from the Zip Books Project Coordinator. 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.PLPINFO.ORG. Examples of discard lists are shared in **Attachment N**.

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 will 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.

Photo courtesy of Christian Koszka, FreeTime Productions

Step 11: Marketing

Now that most of your internal procedures are set up, you will 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 online at: https://northnetlibs.org/policies-and-best-practices/). Additional marketing tools, including promotional videos, can also be found at: https://northnetlibs.org/zip-books-marketing/

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, 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*
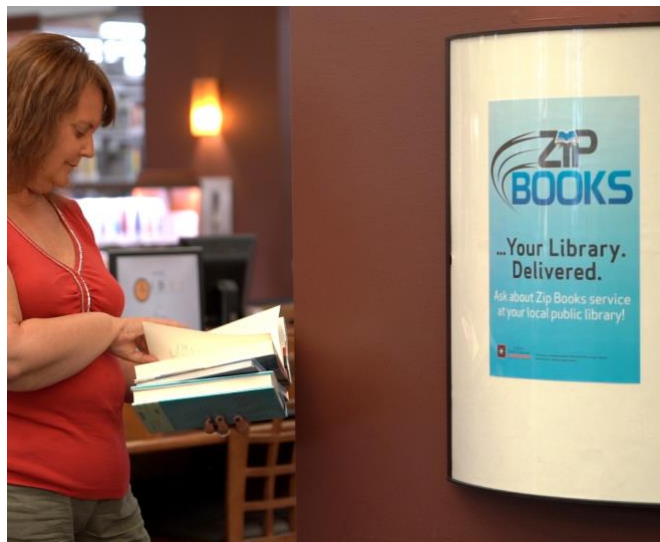 - *Attach a Zip Books sticker to the item spine for quick browsing*

Photo courtesy of Christian Koszka, FreeTime Productions

- *Online Advertising/Social Media*
  - *Advertise the program on your library homepage and all social media platforms. Examples of social media posts are shared in the Supporting Documents section in **Attachment O***
  - *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 is 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 are 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 P** 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 material are included in **Attachment Q** and are also available for download through our Zip Books website: https://northnetlibs.org/printed-marketing-materials/. Customizable files can also be found online. To request additional or replacement stock, all you need to do is send an email to Jacquie Brinkley, the Zip Books Project Manager, at brinkley@plpinfo.org indicating the amount of materials needed. Materials are sent directly from the printers so libraries are asked to check their full stock to see if any additional materials will be needed in the following months.

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 R***.

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 S***. 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-about-us/) and explore what other libraries have done by clicking on the Google Map links. Or you can view the list of program webpages shared at: https://northnetlibs.org/program-webpages/.

PHASE 3:

Program Launch

This section covers testing and launching your local Zip Books program.

Photo courtesy of Christian Koszka, FreeTime Productions

Now that you have completed setting up your program, it is time to launch Zip Books.

Is your program ready to launch?

Before launching your program to the public, you will want to make sure you have everything necessary in place. However, it is 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 T***) 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 will 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 is 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, do not 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 will 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 have launched Zip Books, you will 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 will 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 is 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) 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, which 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 U*, or on our website: https://northnetlibs.org/invoicing/.

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 the responsibility of libraries to pay out-of-pocket. Libraries are recommended to sign up for digital statements if possible. Either digital or hard copies of invoices 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 V.*

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 U* and an example of what this report should look like is seen in *Attachment W.*

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 V.*

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 X**). A screenshot of the reporting form is shown in **Attachment Y.** All three documents are available on the Zip Books website at: https://northnetlibs.org/statistics-reporting/.

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). These statistics are to be reported in the blue tab labeled "MONTHLY Statistics" of the "FY20-21 Zip Books Statistics Reporting Form. 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.

For those libraries that track other points of data about each Zip Books request, an "OPTIONAL Statistics" tab is provided so that staff can share with project administration additional information about the number of Zip Books requests received, the types of requests received (divided by format then genre type), and the total staff time for Zip Books request processing. Although these statistics are not required, it does provide a useful peek into the state of a program and the most requested types of materials.

Due to the growing popularity of Zip Books and limited grant funding, some libraries have chosen to supplement their local programs with funds from their own libraries, such as their Collection Development budget, or with support from their Friends of the Library group. In order to track these additional expenditures while also keeping them separate from grant-funded items (for fiscal and statistical purposes), a red tab labeled "LOCAL LIBRARY FUNDED Statistics" is provided in the statistics reporting form. In it, libraries are asked to report the number of Zip Books ordered that month using supplemental funds, the number of supplemental-funded items that were added to their library collection, and the total amount of local funds used to supplement their program. Although libraries are not required to submit any invoices or Order History reports for these supplemental-funded items, these statistics are still tracked and reported to the State Library to help further demonstrate the demand for Zip Books.

While these statistics should not take too much of your staff's time to track, we recommend building these questions into your regular program tracking 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**" and check out the Tracking Toolkit, which is available for download at: https://northnetlibs.org/policies-and-best-practices/.

Program Support

While your library may be running its program independently, it is 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.PLPINFO.ORG. Whatever the situation, do not hesitate to reach out!

Furthermore, program tools, such as this Onboarding toolkit, Best Practices toolkit, and Tracking 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 at: https://northnetlibs.org/zip-books-resources/. 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 is a great opportunity to network with your fellow Zip Books libraries, but if you cannot make it then 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-open-forums/.

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://northnetlibs.org/zip-books/) and as communicated via listserv and e-mail by the project grant monitor at the State Library and the project coordinators at NorthNet.

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

5) The Library will work to expend the full amount allocated to their program within the stated time. NorthNet/California State Library reserves the right to reallocate unspent funds to address the funding needs of other libraries.

6) The Library will offer any Zip Books purchases not added to their collection to other participating Zip Books Libraries throughout the state or within their consortium prior to donating it to their Friends of the Library.

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

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

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

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

Director Name: _____

Director Signature: _____

Designee Name: _____

Designee Signature: _____

Date: _____   Library: _____

Attachment B – Amazon Procedures

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

Zip Books Amazon Account Procedures

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

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

2. **Apply for an Amazon.com Corporate Credit Line – Pay-In-Full Credit Line**

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

*for Zip Books will ensure the Amazon Corporate Credit Line is linked to your standard Amazon
created for the Zip Books Project).*

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

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

g. Set Amazon Corporate Credit Line as your default payment method in your Zip Books
Amazon account (s*hould 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=m
arketing&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 NorthNet Fiscal Department in order to get reimbursed for Zip Books fees covered by the grant, including Amazon Prime Membership fees and Zip Books orders accidentally charged to the wrong account. The forms can also be found online at https://northnetlibs.org/invoicing/

California Library Services Act (CLSA)

ZIP BOOKS PROJECT

AMAZON PRIME FEE REIMBURSEMENT CLAIM FORM

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

Please type or print clearly:

Date of Request _____

AMAZON Prime Membership Fee: $_____

Library Name:_____

Address: _____

Phone #: _____ ____

Signature:_____   **Date:**_____
            (Signature Required)

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

PLEASE USE THIS DOCUMENT FOR ONLY AMAZON PRIME MEMBERSHIP FEE REIMBURSEMENT

10/17/18 Version No. 1

California Library Services Act (CLSA)

ZIP BOOKS PROJECT

ZIP BOOKS EXPENSE REIMBURSEMENT REQUEST FORM

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

Please type or print clearly:

Date of Request _____

Zip Books Expense To Be Reimbursed: $_____
Attach Amazon Paid Order Receipts.

Library Name:_____

Address: _____

Phone #: _____

Signature:_____   **Date:**_____
　　　　(Signature Required)

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

12/27/18 ZB Req Version No. 1

Attachment D – Purchasing Policies

These policies set forth by NorthNet and the State Library indicate the types of items eligible for purchase through the Zip Books program. The most up-to-date purchasing policies can be found online at https://northnetlibs.org/policies-and-best-practices/

Zip Books Purchasing Policies
for FY20-21

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

1. **Zip Books users must be registered borrowers in good standing**
   1.1. This is generally defined as having a current library card with no more than $5 in accumulated fines. However, libraries may choose to establish their own definition or restrictions, such as requiring the patron to be a resident of their jurisdiction.
   1.2. Borrowers may request Zip Books on the same day their library cards are issued.
   1.3. Libraries may choose to establish a two-strike policy that would withdraw the good standing (either temporarily or permanently) of Zip Books users who do not follow program policies or that have lost/damaged items.

2. **Allowable Zip Books purchases**
   2.1. Books available in tangible format – regular print, large print, or audiobook (MP3/CD/Playaway), including current titles in hardback or paperback and in any genre. E-books, E-audiobooks, CDs, DVDs, and any other non-book related items are not allowed unless purchased with local library funds. However, books that come with a CD/DVD included are allowed.
   2.2. Items not already owned by your library or whose status is listed as LOST, including items available through a shared system but that are not owned by your individual jurisdiction
   2.3. Prime and Non-Prime materials – so long as it can be purchased on the Amazon.com website and the cheapest shipping option is selected
   2.4. Used copies – if they are in good condition. Note that items purchased from other Amazon sellers will not have an option to include a gift slip/message.
   2.5. There are no restrictions as to genre. Current fiction is okay, but many libraries choose to limit requests to items not published in the last 6 months in order to weed out the core materials that would normally be ordered by your library.
   2.6. Duplicate requests for unowned items are allowed up to 3 copies

2.7.   Book sets can be purchased and are recommended if it is more cost-effective

2.8.   Textbooks and Study Guides – if they are general enough in nature to appeal to a broad audience and will be added to your collection. Textbook rentals (printed or digital) are not allowed.

2.9.   Adult fiction best sellers in <u>alternative formats only</u> (large print or audiobook/Playaway)

2.10. Non-fiction best sellers and young adult/children's best sellers in any format

2.11. Former best seller titles that are no longer on the New York Times Best Seller list or that have been on the New York Times Best Seller list for more than a year

2.12. Items from non-US vendors, such as foreign-language materials, so long as the cheapest shipping option is selected

2.13. Items that would have formerly been requested through interlibrary loan (includes current fiction/non-fiction if not part of a library's collection development focus or outside the scope of a library's ability to purchase with their own funds). You may continue to use traditional interlibrary loan at your discretion.

2.14. Exercise judgment when ordering items of higher cost, such as textbooks and study guides. Make sure that these titles or types of materials are appropriate for your collection.

3. Five item limit per patron, per month

3.1.   Libraries should monitor the number of Zip Books requested by a patron at any one time, and may determine the maximum number, with a maximum allowable of 5 items per customer per month.

3.2.   Libraries can choose to allow patrons their maximum allowable items all at once, or limit it to one item at a time, depending on their own borrowing policies.

3.3.   Libraries should take into account their budgeted allotment when determining item limits. Limits can be adjusted as needed so long as patrons are informed of any changes.

4. Two-tiered expenditure cap

4.1. $75 pre-tax and shipping for audiobooks and foreign-language items, and $50 pre-tax and shipping for all other allowable items.

4.2.   Higher per-item expenditures must be pre-approved by NorthNet. Should you wish to order an item more than the set expenditure cap, send the Project Coordinator an email (nuesca@northnetlibs.org) detailing what you want to purchase or a link to the item.

5. Shipping

5.1.   When placing orders, you should take advantage of the Amazon Prime free two-day shipping option whenever possible. If the free two-day shipping option is not available, select standard shipping. You should not use expedited shipping.

5.2.   Items should be shipped directly to the customer from Amazon and not to the library first for processing.

5.3.   If it is in the best interest of the patron, exceptions <u>may be</u> made and items can be shipped to the library, a PO Box, or Amazon Locker (i.e….unsafe for deliveries to be made, patron request for personal reasons). Some sort of indication should be made on the shipping label identifying this as a Zip Books request so as to not raise any red flags when our Fiscal Dept reviews monthly reports. For example, the shipping name would be entered as "Patron Name – ZIP" or "Library Branch Name – ATTN: Zip Books".

5.4.   If the patron is requesting multiple items and your library allows more than one request at the same time, a bulk order can be processed for convenience.

6. **Staff requests**

6.1.   Library staff members that are also patrons may be allowed to request Zip Books for personal use only and should be limited to no more that 1 or 2 items per month.

6.2.   Staff requests should be monitored onsite by the Zip Books coordinator. This will help to ensure that grant funds are used as intended.

6.3.   Library volunteers are also allowed to request Zip Books for personal use only and are not subject to the 2 item staff limit.

7. **Zip Books Discards**

7.1.   Items not added to your library collection should first be offered to other participating Zip Books libraries within your consortium or throughout the state prior to donating it to your Friends of the Library.

7.2.   To help save on labor and shipping costs, libraries are welcome to share Zip Books discards with other participating libraries within their cooperative system instead of making them available to all libraries, allowing you to take advantage of your local shipping resources.

7.3.   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.

7.4.   Libraries may choose to give patrons the option to purchase their requested Zip Books if it is not added to their library collection. The price charged should be the exact amount paid by the library at the time of purchasing. Funds received should be put back into your library's collection development budget towards purchasing more materials. We are unable to add funds back to your Zip Books allocation at this time.

8. **Using Local Library Funds**

8.1.   Libraries using local library funds to supplement their Zip Books program may choose to expand Zip Books parameters if they wish, such as allowing requests for DVDs and e-books.

8.2.   If Zip Books parameters are expanded, you must make some sort of distinction on your program webpage and other program materials indicating that these exceptions are only being allowed while your library is using your own funds.

Attachment E – FAQ for Participating Zip Books Libraries

This FAQ answers the most common questions that participating libraries may have about Zip Books policies and procedures. The most up-to-date FAQs can be found online at https://northnetlibs.org/zip-books-faq/

FAQ for Zip Books Libraries

This FAQ sheet is intended to answer common questions asked by participating libraries regarding Zip Books policies, procedures, and more, which are set forth by the NorthNet Library System and the California State Library. If you have additional questions, please contact the Project Coordinator at nuesca@northnetlibs.org***.***

1. **What restrictions are there on the type of materials that we can order through this service?**
   The following are items your library is allowed to purchase using Zip Books funds:
   - Items not already owned by your library or whose status is listed as LOST, including items available through a shared system but that are not owned by your individual library
   - Books available in tangible format – regular print, large print, or audiobook, including current titles in hardback or paperback and in any genre, and Playaway audiobooks
   - Prime and Non-Prime materials – so long as it can be purchased on the Amazon.com website and the cheapest shipping option is selected
   - Used copies – if they are in good condition
   - Textbooks and Study Guides – if they are general enough in nature to appeal to a broad audience and will be added to your collection
   - Adult fiction best sellers in alternative formats only (large print or audiobook)
   - Non-fiction best sellers and young adult/children's best sellers in any format
   - Former best seller titles that are no longer on the New York Times Best Seller list
   - Items that would have formerly been requested through interlibrary loan

   The following items should NOT be purchased with Zip Books funds, and should be purchased with library funds instead:
   - Items that are already owned by your library in that specific format
   - Adult fiction best sellers in regular print
   - Core materials that would normally be ordered by your library
   - Textbooks and Study Guides that are narrow in scope
   - E-books, E-audiobooks, CDs, DVDs, and any other non-book related items

2. **Why can't we order best sellers? And what counts as a best seller?**
   This policy was created to weed out the requests for core materials or items (mainly fiction) from popular authors that would normally be purchased with a library's own funds. Keep in mind that Zip Books is intended as an alternative to traditional interlibrary loans, so the rule of thumb is that purchases should be for items that would normally be ordered through ILL if Zip Books was not available. However, current adult fiction best seller items can be purchased in alternative format (large print or audiobook) if your library does not already own them in that format. Non-fiction best sellers and young adult/children's best sellers can also be purchased in any format. The New York Times Best Seller list should be used to gauge if an item is a best seller or not. Titles no longer on the current best seller list are okay to purchase. To accommodate this policy, some libraries have chosen to limit Zip Books requests to items 6 months or older.

3. **A patron submitted a Zip Books request for an item that is over the expenditure cap. Can we still purchase it?**

   There is a two-tier expenditure cap of $50 pre-tax for books and $75 pre-tax for audiobooks and foreign-language items, including Playaway audiobooks. Items costing more than the set expenditure caps can be purchased with pre-approval from the Project Coordinator. To get approval, send an email to nuesca@northnetlibs.org with a link to the item or the item details.

4. **A patron submitted multiple Zip Books requests for a research project. Can we purchase those books for them all at the same time?**

   Yes, you are allowed to do this. Although we do recommend libraries to limit patrons to one item at a time, in order to ensure the item is returned and the patron remains in good standing, this may not work for everyone. Libraries are given the flexibility of determining their own maximum number of requests allowed by a patron at one time, with the condition that this not exceed 5 items per customer per month.

5. **Can we have the materials delivered to our library for cataloging/inventory first?**

   One of the most attractive things about this model is the speed with which patrons receive service over traditional ILL. Having the materials delivered to your library for cataloging first would take the "zip" out of Zip Books. The policy is to have the items delivered directly to requesting patrons at the point of ordering. Procedures and guidelines can be put in place to minimize problems that might occur (patrons not returning books, etc.), such as requiring patrons to be in "good standing" in order to participate in the program. In special cases or areas where theft is a concern, arrangements can be made to have items delivered to an Amazon Locker, PO Box, or to the library for pick-up from the patron. Some sort of indication should be made on the shipping label identifying this as a Zip Books request so as to not raise any red flags when our Fiscal Dept reviews monthly reports. For example, the shipping name could be entered as "Patron Name – ZIP" or "Library Branch Name – ATTN: Zip Books".

6. **Are staff allowed to request Zip Books for personal use?**

   Yes! In fact, we encourage staff to use the program at least once, so they can become familiar with the process and be able to "talk it up" to patrons. Library staff members are limited to no more than 1 or 2 items per month, which should be monitored onsite by the Zip Books coordinator. This will help to ensure that grant funds are used as intended.

7. **Are we allowed to charge for Zip Books?**

   Part of the appeal of Zip Books is that it is a free and convenient service. However, we do understand that the program does require time and labor to implement. As such, libraries may choose to charge patrons to use the service or to charge patrons the cost of a replacement if an item is lost, not returned, or damaged. Some libraries also give patrons the option to purchase their requested Zip Books if it is not added to their library collection. The price charged should be the exact amount paid by the library at the time of purchasing. Funds received should be put back into your library's collection development budget towards purchasing more materials. We are unable to add funds back to your Zip Books allocation at this time.

8. **What should we do with Zip Books items not selected for inclusion into our library catalog?**
   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. To help save on labor and shipping costs, libraries are 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. 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.

9. **Some Zip Books orders were accidentally charged to my city/county credit card instead of our Amazon Corporate Credit Line, what should I do?**
   If the order has not yet been delivered, you may be able to call Amazon Customer Service to reverse the charges. However, if the items have already been delivered, they will not be able to help you. Instead, you must submit a "Zip Books Expense Reimbursement Request Form" in order to get reimbursed for those purchases. This form and the "Amazon Prime Fee Reimbursement Claim Form" are available on the Zip Books website at https://northnetlibs.org/zip-books/. The completed form and relevant order invoices should be submitted to ZipBooksInvoice@northnetlibs.org.

10. **What's the future of the program? How do we apply for funds for the next grant period? Is it possible to get additional funds if we run out?**
    The Zip Books project is currently being funded with the support of the California Library Services Act funds and an additional $1 million allocation was approved by the California Library Services Board for the continued support and expansion of our project through June 30, 2021. If your library has already joined the Zip Books program, you do not have to reapply for funds again. Allocations are determined annually by the California State Library and NorthNet using a formula that takes into account the number of registered borrowers and past spending patterns. If additional funds are needed, contact the Project Coordinator and we will work to get your allocation increased.

11. **How do I get more marketing materials? Are we allowed to create our own?**
    Marketing materials are available in bookmark, bookplate, postcard, and poster formats in both English and Spanish. To request additional or replacement stock, send an email to Jacquie Brinkley 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 create their own marketing materials to fit their specific needs. The files of our marketing materials and logo are available on the Zip Books website at https://northnetlibs.org/zip-books/ for you to download. If a file is needed in a different format than what is provided, send a request to Jacquie Brinkley.

12. **How do I join or remove myself from the Zip Books listserv?**
    Our listserv is a handy tool for Zip Books libraries to post questions to other participating libraries, as well as share discard lists of Zip Books not chosen for addition into a library collection. To join the Zip Books listserv, email Jacquie Brinkley at brinkley@plpinfo.org. To send an email to the entire list, email your message to ZIPBOOKS@LISTSERV.PLSINFO.ORG. To unsubscribe from the list, send an email to ZIPBOOKS-signoffrequest@LISTSERV.PLSINFO.ORG.

13. **Help! There's something wrong with my Amazon account, what should I do?**

   No matter the issue, the first thing you should do is contact Amazon Customer Service to see if they can assist with the problem or provide additional information on what could be wrong. The following are the numbers to call depending on your issue:

   > General Amazon account issues: 1-888-280-4331
   > Invoicing issues: 1-866-634-8381
   > Credit Line issues: 1-866-634-8380

   For libraries having issues with their NLS credit card, the authorized user should call the credit card company (US Bank: 800-344-5696) to understand the issue. If the library needs assistance with their credit card limit or other specifics about the credit card, please contact the Project Coordinator by email or phone.

14. **How can I find out what libraries are part of the Zip Books program?**

   A current list of all the participating Zip Book libraries across the state can be found on the Zip Books website at https://northnetlibs.org/zip-books/.

15. **Who do I contact if I have additional questions or have a Zip Books related issue?**

   The primary contact for this project is Mercy Nuesca, Zip Books Project Coordinator working with the NorthNet Library System and Pacific Library Partnership. Her contact information is:

   Mercedith Nuesca
   Project Coordinator
   650-847-8869 Cell (Preferred)
   650-349-5538 General Office
   nuesca@northnetlibs.org
   https://northnetlibs.org/zip-books/

Attachment F – 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:

    o Delete the Zip Book note on the patron's account

    o Send the book in transit to Tamara at the Hanford Branch Library.

• Another Zip Book may be requested at that time.

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

*If a patron's request does not meet the requirements for Zip Books, encourage them to use regular ILL with a $15.00 fee.

**Lake County Library
Zip Books Manual**

April 2018

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

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

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

Patron Requests
Go through the list of patrons to see which patrons have unprocessed requests. Look up each patron in Horizon to check for fines and fees over $10. Check to see if the patron has a Zip Book checked out. If the patron's account is good and has no more than 1 Zip Book, you can place the Zip order in Amazon. You can spot Zip Books because the I-type shows as LZIP.
Check Horizon to see if the book is available there. If so, request it in Horizon for the patron. In the patron request spreadsheet, type HORIZON in the Status cell. Highlight the request details and choose Strikethrough to cross out the text. Fill the request detail cells with light orange. Do not delete the text; you might need to refer to the request in the future. Retain the request information for about 6 months because sometimes you will need to refer to it.
If the patron has Zip Books CKO, find the new request(s) in the spreadsheet, enter WAIT in the Status cell, and fill it with lime green.
If the patron has outstanding fines, fill the Status cell in turquoise. Type FINES in the Notes cell and fill with turquoise.
When the patron clears the fines or returns a Zip Book, you can fill the next request.

Amazon Search
Go to Amazon. Search for the patron's item.
If the item is in Amazon Prime and the price is under $35, we can order it. If the item is $35 or more, we have to email the Zip Books Project Coordinator to ask permission to order it.

If the item is not published yet, go to the patron spreadsheet and enter the projected publication date in the Notes cell and fill that request with turquoise. Type PENDING in the Status cell.

OCLC Records

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

Amazon Ordering

Find the item. Select **Amazon Prime** copies only, $35 or under. Select **new** items, **hard cover** if possible. Put it in the cart. Proceed to checkout. Choose the patron from the list of addresses, or add a new patron [look near the bottom of the page for the link.] Use the Zip Visa card [number xxxx in the password book] for existing patrons, or enter it for new patrons. Choose **Use this payment method**. Click on **Add a Gift Receipt**. Edit the text for the gift receipt:

Dear Patron. Your ZIP BOOK ~TITLE~ is checked out on your library card and is due DATE 4 weeks from order date. The barcode is 25253000xxxxxx. Please return this note & the book to a library employee. From Lake County Library 263-8817.

Get a barcode from the roll. Scan it into the gift receipt] [NOTE if the gift message is too long, the Save button will be grayed out. Delete some spaces and it should clear the problem.]

Place the Amazon order.

To print the invoice:

In Amazon-

1. Click Review or edit your order.
2. View or Print Invoice.
3. Print this page for your records.
4. Print.

Paper clip the barcode to the invoice.

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

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

Horizon: Begin the processing.

Import the OCLC MARC records. In the Copy Item List create a new item using the barcode assigned to that book. Change the record so the I-type is LZIP and use the real collection code. Use the price that's on the invoice.

CKO to patron with the Zip barcode.

DETAILS.

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

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

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

Check the **Zip Books Gmail** account regularly [lakelibzipbks@gmail.com, *fastlibros*]. Delete routine order confirmation/shipping/delivery emails. Watch for messages about delivery delays and problems and follow up as needed.
Amazon Order reports. In Amazon create order reports to see how we're spending our allotment, see who is ordering, etc. Go to Account and Lists > Your Account > Ordering and shopping preferences > Download order reports

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

How to find Amazon help.
Amazon has a help desk but it's <u>very well</u> hidden. INSTRUCTIONS.

MENDOCINO COUNTY
STAFF INSTRUCTIONS

ZIP BOOK INSTRUCTION

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

Amazon.com Gift Note

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

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

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 G – Ordering Procedures

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

Instructions for purchasing Zip Books

1. Check Library Catalog for item.
2. Select item, select format. MUST be available using Prime. May purchase used items if Prime shipping is available.
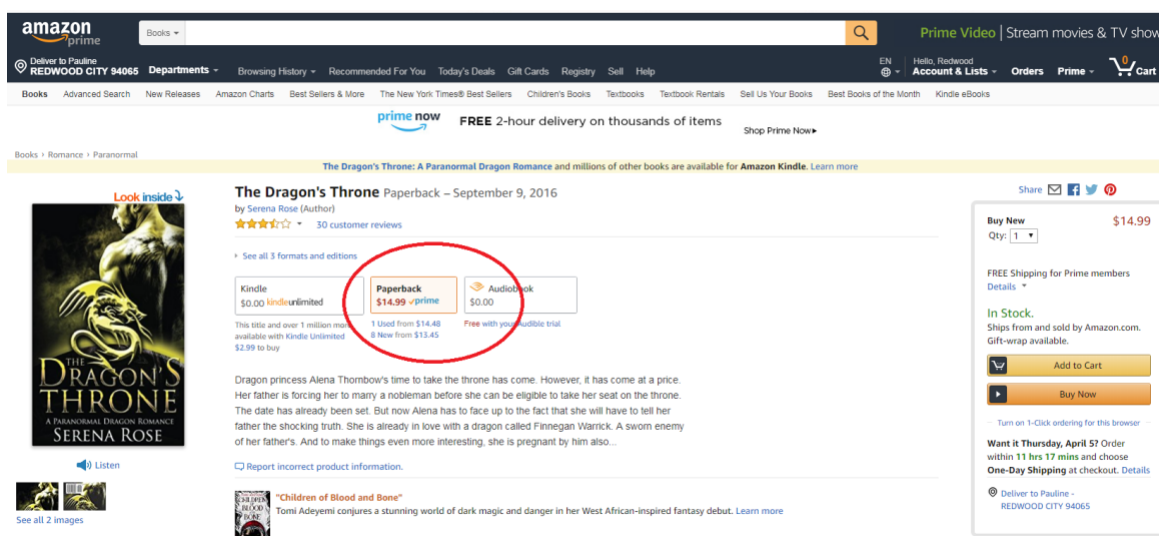
3. Select "Add to Cart" and make sure quantity is "1".
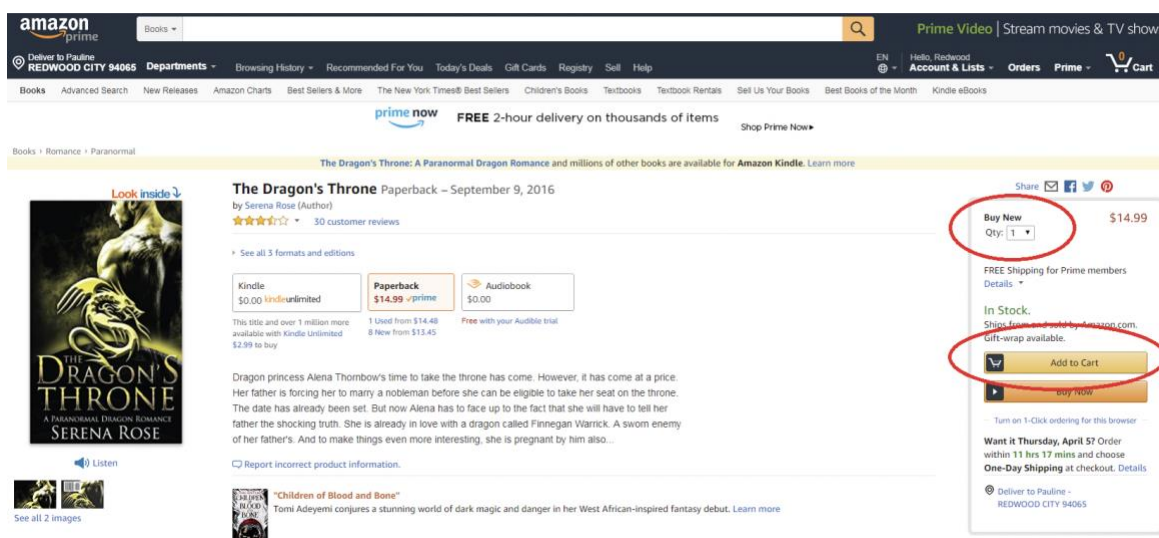
4. Select "Proceed to checkout" and make sure quantity is "1".
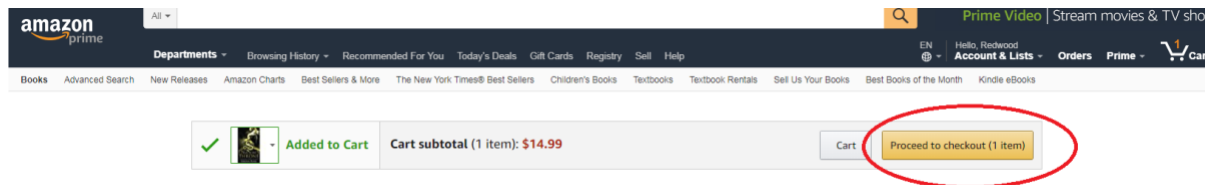
5. Click on "Change" to change the shipping address to customer's address.
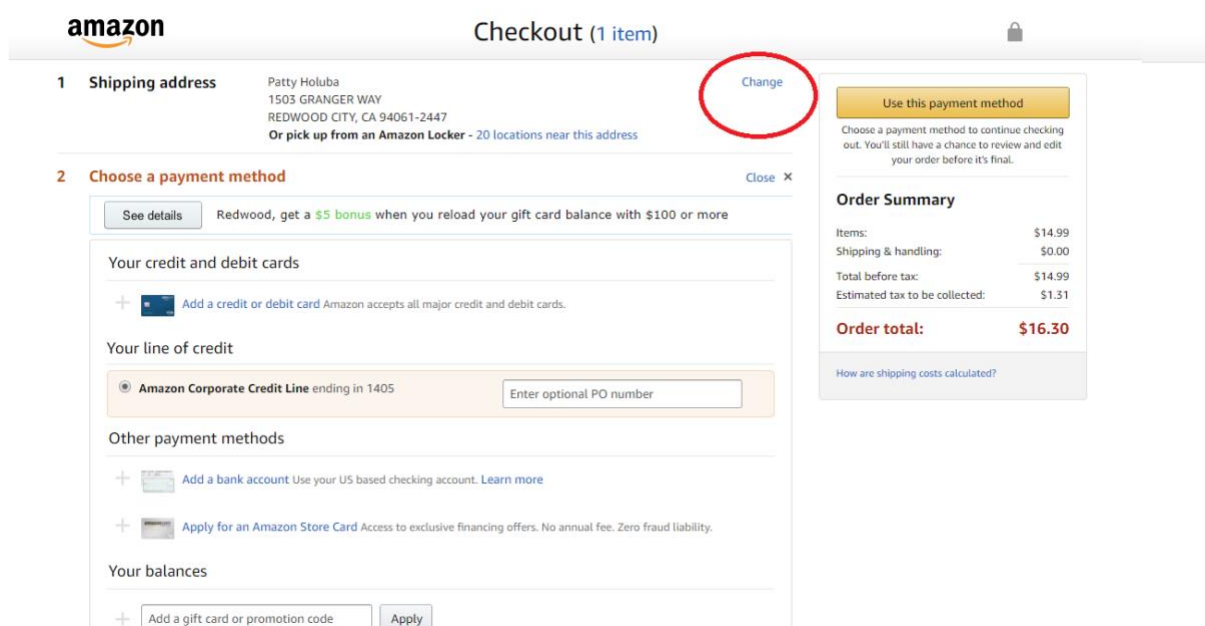
6. Click on "Add a new address"
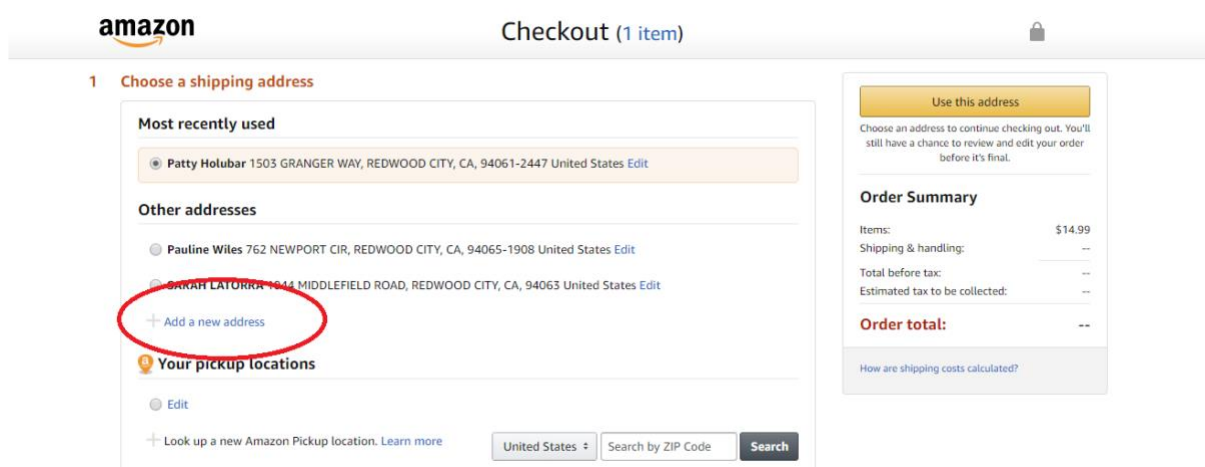
7. Fill in information for customer. Select "Use this address".

Enter a new shipping address   ✕

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

Additional Address Details | What's this? ▼
Preferences are used to plan your delivery. However, shipments can sometimes arrive early or later than planned.

Weekend delivery:
▸ Which days can you receive packages?

Security access code:
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
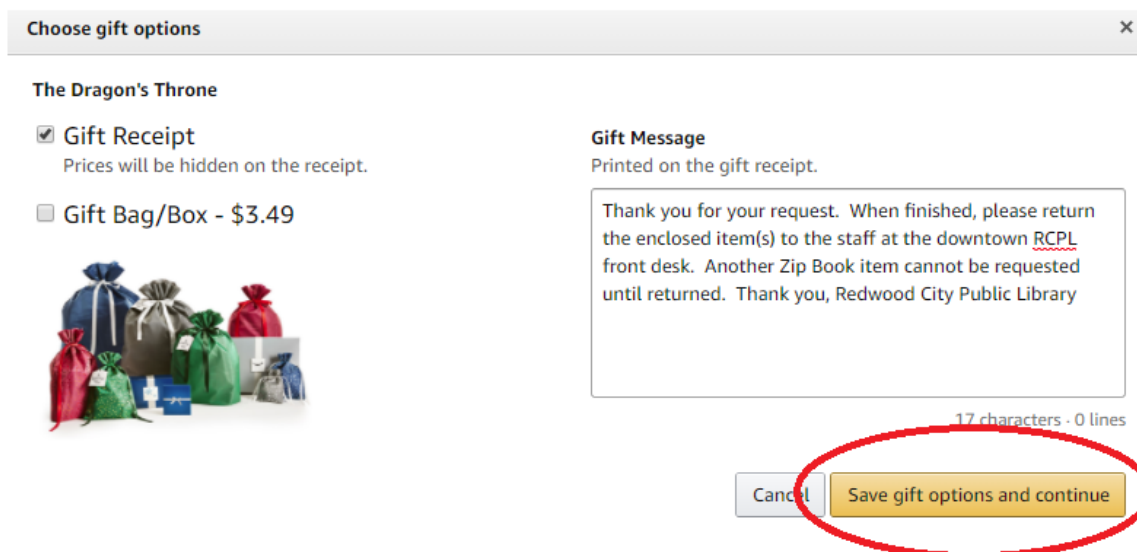
11. Select "Save gift options and continue"

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 H – 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—Lake County Library

This is a basic outline of the Zip order process.

Refer to the Zip instruction manual for full details.

#		
1	Go to list of Zip requests	
2	Horizon: Does the patron have fines over $10 or excess CKOs? No. Proceed below. Yes ⟶	YES. Notify patron fines need to be paid or items returned before Zip request can be processed.
3	Horizon: Does the patron have 2 Zip books checked out?, or have had 5 this month? NO. Proceed below.	YES. Flag the new request as WAIT.
4	Horizon: Is the book available at any Lake County branch? 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, preferably in Prime? YES. Proceed below.	NO. Suggest interlibrary loan to the patron.
6	Amazon: Is the price more than $50.00 [book] $75 [BOCD]? NO. Proceed below.	YES. Ask Zip admin for permission to order. APPROVED. Proceed to ordering. NOT APPROVED. Suggest interlibrary loan to the patron.
7	OCLC Connexion: Is there a bibliographic record for the book if it's not in Horizon?	NO. We can't order it unless it's a local author. ILL probably isn't an optio either. Notify patron.
8	OCLC Connexion: Export the bib record.	
9	Amazon: place the order including a gift ece ipt with the Zip information, if Amazon offers that choice.	
10	Amazon: Save the Amazon invoice as a PDF. Use "Fill & Sign" -Write the branch assignment & call number on the invoice.	
11	Cataloging shortcut & Horizon: Import the bib record into Horizon.	
12	Horizon: Attach the book barcode to the bib record.	
13	Horizon: Check the book out to the patron.	
14	Horizon: when book is returned, determine if library will keep or decline. Process the keepers.	

Attachment I – 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. Additional examples of internal tracking tools can be found on the Zip Books website at: https://northnetlibs.org/policies-and-best-practices/.

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

Attachment J – Patron request forms

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

ZIP BOOK REQUEST   Patron Name/Branch_____

Patron ID:_____ Date: _____Phone (_____)_____

Address: _____

Email: _____   _____

Title:_____Author:_____

_____

Format: _____Print _____Audio _____Large Print_____ Staff Initials____

Category:

_____ Adult Fic   Bestseller   Yes   No   _____ Children's Fic   Bestseller   Yes   No

_____Adult Non-Fic   Bestseller   Yes   No   _____ Children's Non-Fic   Bestseller   Yes   No

_____YA Fic   Bestseller   Yes   No   _____ Foreign Lang Fic   Bestseller   Yes   No

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

_____ Other (List) _____

--Fill in below as applicable--

Item: Price:

_____

_____

Date ordered: _____ Staff initials: _____

Item return date/staff initials: _____ Notes : _____

_____

Returned item was : _____ Added to collection _____Donated to Friends

                    _____ Other (explain) _____
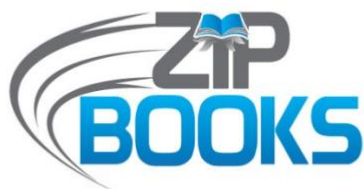
ZIP BOOKS / INTERLIBRARY LOAN REQUEST

(updated 9/22/15)

Can't find what you want at the library? We currently have access to a **free** interlibrary loan option called ZIP Books which allows the library to purchase items that we don't have in the catalog.

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

Your Name:

Library Card #:   **Date:**

Phone #:   **Email:**

Mailing Address (ZIP Books requests will ship directly to this address):

Title:

Author:

Publisher/Date (optional):

Format: ☐ Book   ☐ Book on CD   ☐ Large Print   ☐ DVD   ☐ Music CD

Standard ILL request ($2):

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

Pick-up location:
☐Ukiah   ☐Willits   ☐Fort Bragg   ☐Coast   ☐Round Valley   ☐Bookmobile

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

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

Print Notice 1:

Lake County Library Zip Book request information

Your request for

_____

will be filled by a Zip Book that will arrive in your mail _____

The book is checked out to you for 4 weeks. Due date _____

Save the Amazon paperwork that comes with the book.

When you finish the book, return it and the Amazon note to a library circulation employee. Please tell the employee that it's a Zip Book.

~~ **from the Lake County Library interlibrary loan department. 263-8817 x 17106**

Shipper is _____

Print Notice 2:

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

_____.

The library is not able to get this for you.

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

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

Lake County Library, 1425 N. High Street, Lakeport CA 95453. 707-263-8817

<mark>July 20, 2017</mark>
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.
<mark>If you have any questions, please contact the library.</mark>

jmc

Item
Title
Author
Call Number
Library Barcode
Charges
Due Date

Lakeport Library	**Redbud Library**	**Middletown Library**	**Upper Lake Library**
1425 N. High Street	14785 Burns Valley Road	21267 Calistoga Road	310 2nd St.
Lakeport CA, 95453	Clearlake, CA 95422	Middletown CA, 95461	Upper Lake CA, 95485
707-263-8817	707-994-5115	707-987-3674	707-275-2049
Tue, Thu-Sat 10am-5pm	Tue, Thu-Sat 10am-5pm	Tue – Fri 1-6pm	Tue – Fri 1-6pm
Wed 12n-8pm	Wed 12n-8pm	Sat 10am-3pm	Sat 10am-3pm

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

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

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

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

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

Updated 5/10/21

73

Attachment L – 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.
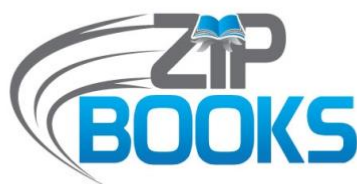
FOR ZIP RETURNS - STAFF USE ONLY
(updated 9/22/15)

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 M – 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-about-us/.

Zip Books Libraries by Cooperative System

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

NorthNet Library System

Alpine County Library & Archives	Placer County Library
Butte County Library	Plumas County Library
Colusa County Free Library	Roseville Public Library
Del Norte County Library	Sacramento Public Library
El Dorado County Library	San Rafael Public Library
Folsom Public Library	Shasta Public Libraries
Humboldt County Library	Siskiyou County Free Library
Lake County Library	Sutter County Library
Lassen Library District	Tehama County Library
Lincoln Public Library	Trinity County Library
Mendocino County Library	Willows Public Library
Modoc County Library	Woodland Public Library
Mono County Free Library	Yolo County Library
Nevada County Library	Yuba County Library
Orland Public Library	

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
District
Goleta Valley Library
Lompoc Public Library

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

Southern California Library Cooperative

Camarillo Public Library
Long Beach Public Library

Torrance 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 N – 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.

Zip Books available from Shasta Public Libraries

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

Attachment O – Social Media Posts

*These are some examples of posts that libraries have created to promote Zip Books on different
social media platforms or to make announcements regarding program changes or news.*

**Zip Books Marketing
using Social Media**

*This is intended to share some ways in which your library can use social media to promote
your Zip Books program and notify patrons regarding any program news, changes, etc. While
these are simple suggestions gathered from posts shared by other libraries, the possibilities
are endless and can differ depending on the social media platforms that your library uses.
Should you wish to share some of the posts and social media marketing tips that your library
staff have successfully employed, we would love to hear from you. Please contact Mercy
Nuesca, the Zip Books Project Coordinator, at nuesca@northnetlibs.org to find out how you
can help other libraries market Zip Books using social media.*

♦ **General marketing posts**
   - Is there a book you cannot find in the library? We can help you get it through the Zip
     Books Program! Create a purchase suggestion from our catalog.

   - Check out ZIP Books! This FREE service allows you to get books from Amazon
     delivered right to your door. To learn more visit *[insert website link]* or call *[insert
     phone number].*

   - Have you tried Zip Books yet? What is it? Zip Books is a way for customers to request
     books that the Library doesn't own. The item is shipped directly to you using
     Amazon.
     Start now at *[insert website link].*

   - Have you heard about our Zip Books program? Zip Books is a way for you to request
     books that our library does not own. Eligible books are purchased through
     Amazon.com and shipped directly to your home — at no cost to you! When you've
     finished with the book, simply return it to a library staff member. Visit *[insert
     website link]* for more information.

   - Have you tried our Zip Books service? It is our free alternative to Interlibrary Loan
     that sends Library books directly to your home 📚🏠
     During the stay at home orders we've expanded our Zip Books service to allow for
     more requests. Follow the steps above to order your Zip Books today📚🏠
     Our Zip Books program is funded by the California State Library

♦ **Program news posts**

- Zip Books is back and better than ever!
  We have temporarily expanded the service by increasing the ZipBook limit to 5 per person per month, up to 15 per family per month. This program expansion is made possible through the assistance of the California State Library.
  Also, we'd like to share this warm, fuzzy comment we received from a patron. "Miss the library a lot. It seems like you are almost as essential as a grocery store with your 'food for the soul.'" We'd like to think that we are as essential to you as you are to us. Thank you. 🤓📚💚

- Zip Books are back!
  You can request up to two Zip Book items per household, per month. Please keep your items until May 8th or until your local branch reopens, whichever comes first. You can use your regular library card so long as you are in good standing or you can use your eCard (after address verification). To get an eCard, go here: *[insert link].* To get started, go here: *[insert website link]*
  ZipBooks is funded by the California State Library and administered by Northnet Library System

♦ **Instructional posts**

- How to order a Zip Book from home…
  The Zip Book program is a special way for patrons to get books that the library doesn't own. The book is ordered and delivered to your house for you to read. You then bring it back to the library and we add it to our collection!
  There are a few rules…the book you choose must be:
  o Something the library doesn't have in our collection
  o Eligible for Amazon Prime
  o Under $50 (print books), under $70 (books on CD)
  Let's get started!

- Zip Books is a new way for *[insert library name]* customers to request books and audiobooks that the Library does not own, and have them delivered to your door in just a few days.
  Approved books are shipped directly to you using Amazon Prime, where you can keep them for up to 3 weeks. After that, return them to a *[insert library name]* staff member, and we can add them to our collection for others to enjoy.
  Next time you cannot find what you are looking for, give Zip Books a try!
  For more information, visit our website: *[insert link].*

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

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

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

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

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

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

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

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

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

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

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

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

"It really is directly from the horse's mouth what they want. They're specifically saying, 'I want to read this.'"

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

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

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

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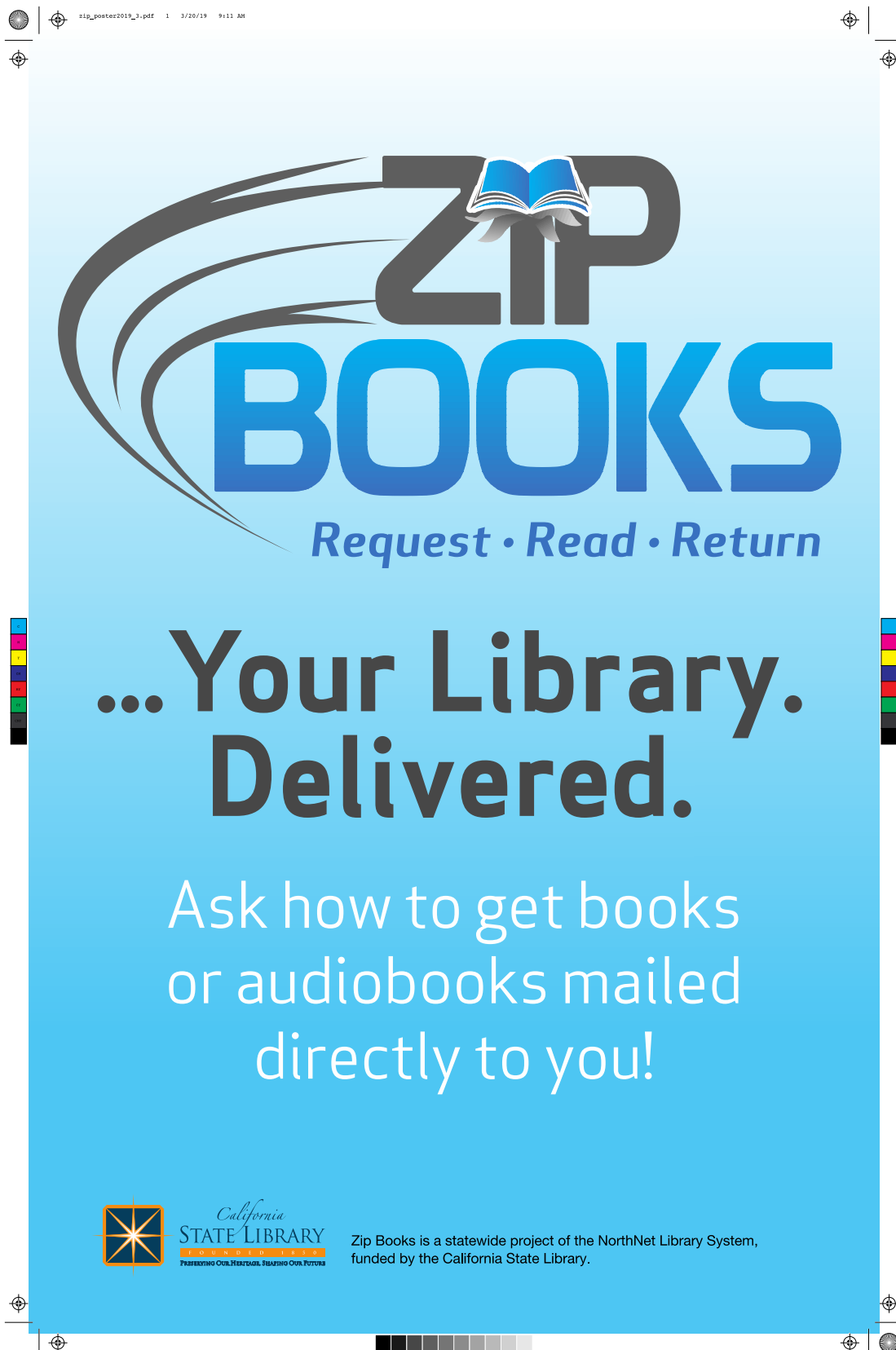
Attachment Q – Marketing Materials

Zip Books has available marketing materials in in both English and Spanish and in four different formats: bookmark, bookplate, postcard, and poster. Customizable files can also be found online at https://northnetlibs.org/printed-marketing-materials/

zip_bookplate2018_1.pdf   1   10/22/18   12:16 PM

ZIP BOOKS

This item was purchased for the Library
through Zip Books, a statewide project of the
NorthNet Library System, funded by the
California State Library.

California
STATE LIBRARY
F O U N D E D   1 8 5 0
PRESERVING OUR HERITAGE, SHAPING OUR FUTURE
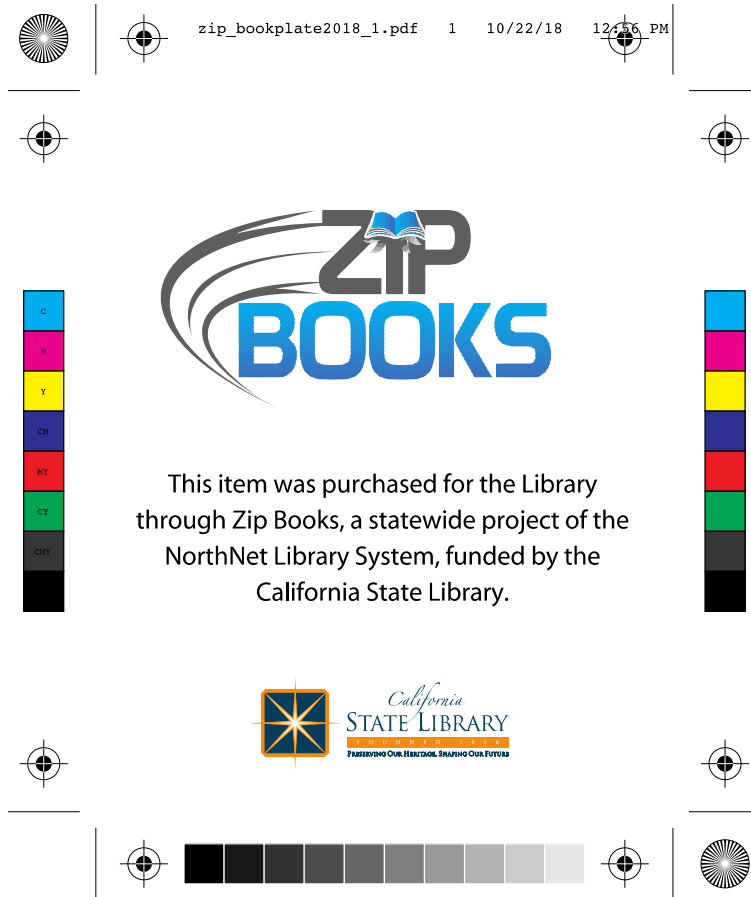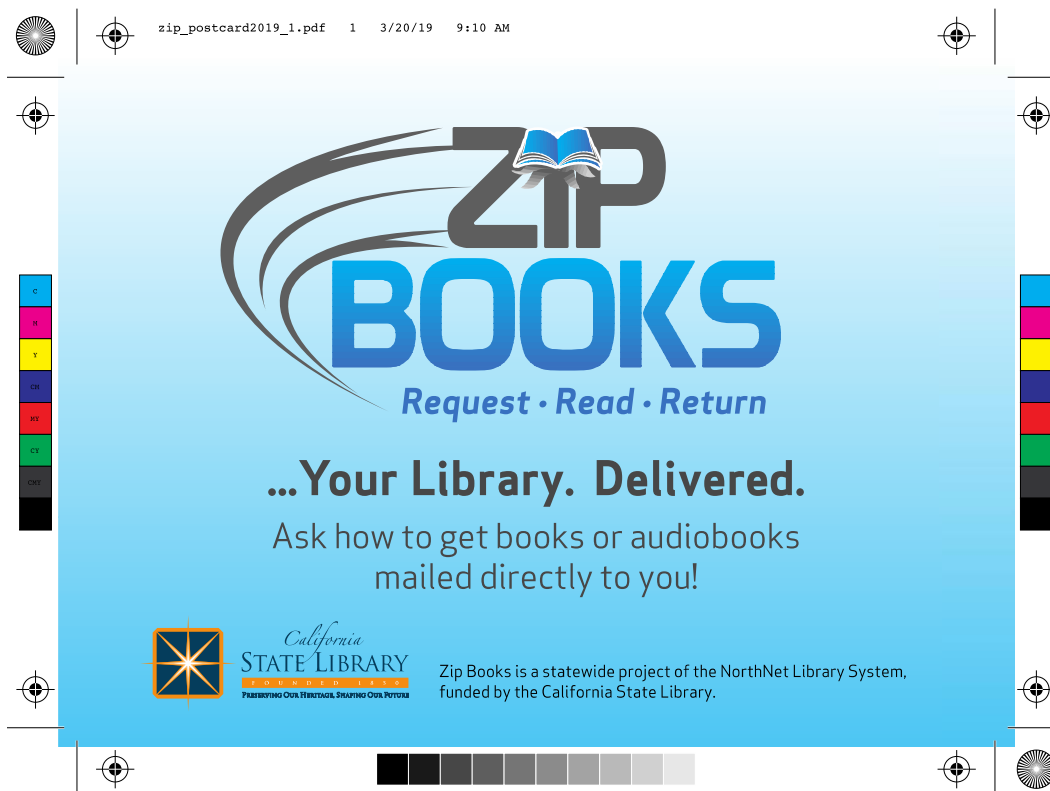
zip_postcard2019_1.pdf   1   3/20/19   9:10 AM

ZIP BOOKS
Request · Read · Return

...Your Library. Delivered.

Ask how to get books or audiobooks
mailed directly to you!

California
STATE LIBRARY
FOUNDED 1850
Preserving Our Heritage, Shaping Our Future

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

zip_postcardSPANISH 2019_3.pdf   1   5/3/19   10:48 AM

ZIP BOOKS
Solicita · Lee · Devuelve

...Su Biblioteca. A su alcance.

¡Pregunte cómo usted puede recibir directamente
por correo libros o audiolibros!
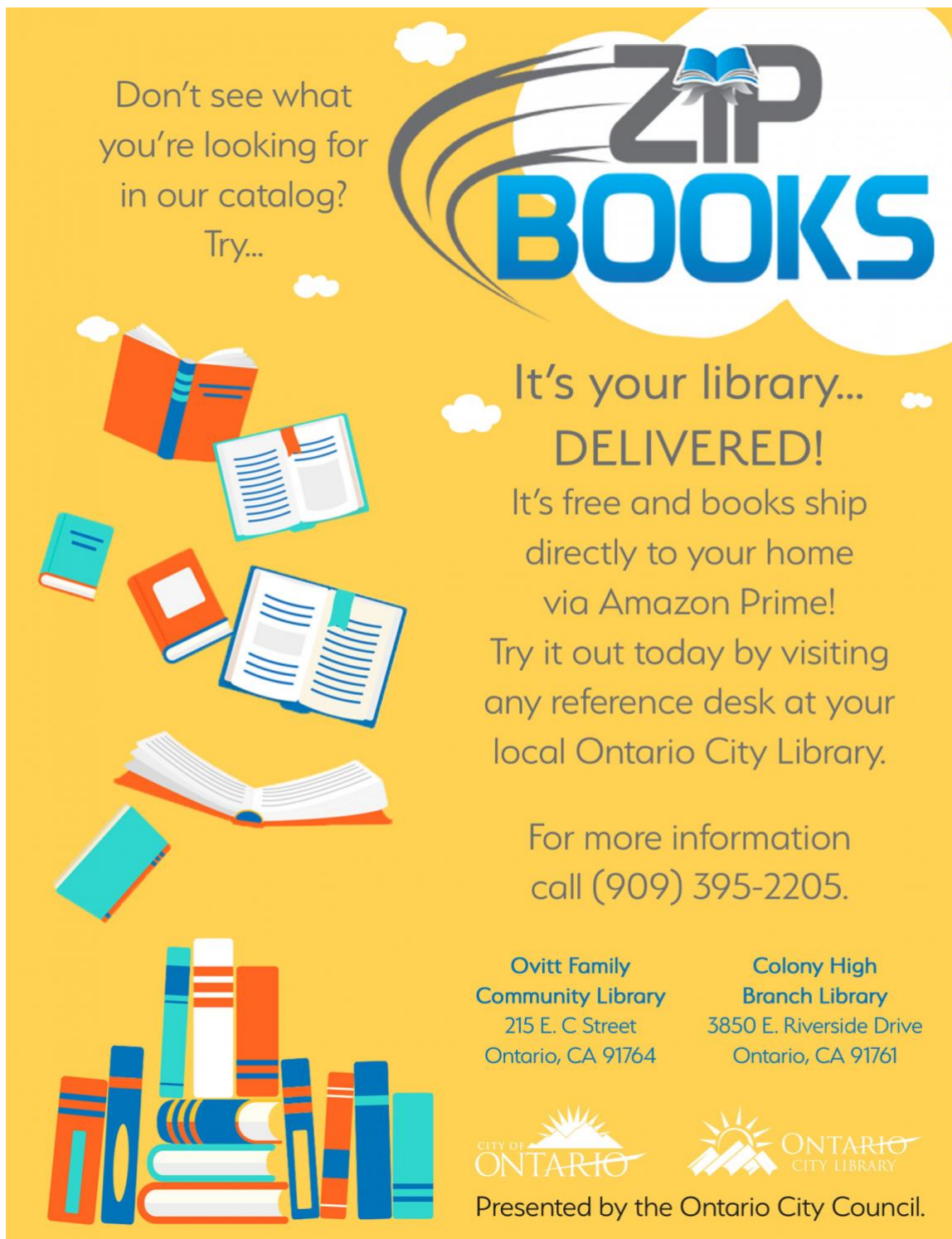
California
STATE LIBRARY
FOUNDED 1850
Preserving Our Heritage, Shaping Our Future

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

ZIP BOOKS
Request • Read • Return

...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.

Attachment R – 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.

This item was purchased for the Library through Zip Books, a statewide project of the NorthNet Library System, funded by the California State Library.

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Avery 5164 template

This item was purchased for the Library through Zip Books, a statewide project of the NorthNet Library System, funded by the California State Library.

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Attachment S – Patron information sheet

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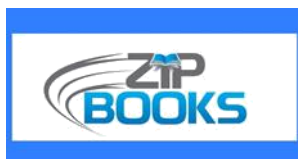
How Zip Books Process Works:

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

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

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

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

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

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

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

RETURNING YOUR ZIP BOOK

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

Do NOT return your Zip Book through the book drop.

You will be asked to complete the ZIP book survey.

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

At the Library's discretion the book will be added to the Library collection for future checkout or donated to the Friends of the Kings County Library.

Attachment T – 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 U – Invoicing Procedures

The most updated Invoicing Procedures can be found online at https://northnetlibs.org/invoicing/

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 V – 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) <mark>ALL pages should be scanned and emailed to ZipBooksInvoice@northnetlibs.org</mark>
   Statements will include the following sample pages

amazon.com

PAYMENT STUB
Page 7 of 56

Account: ▮▮▮▮▮▮ Statement Date: 03/10/19   Page: 7 of 56   Account: ▮▮▮▮▮▮

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

Date	Invoice	Original Amount	Due Date	Reference	Invoice		Date & Amount Due
					Please Indicate by ✓ Invoices Paid		
03/07/19	456464487578	10.96	05/05/19		456464487578	☐	03/07 10.96
03/08/19	455754769334	19.28	05/05/19		455754769334	☐	03/08 19.28
03/08/19	455945899855	17.77	05/05/19		455945899855	☐	03/08 17.77
03/08/19	853343479353	14.39	05/05/19		853343479353	☐	03/08 14.39
03/08/19	594333336688	6.38	05/05/19		594333336688	☐	03/08 6.38
03/08/19	557889779347	17.20	05/05/19		557889779347	☐	03/08 17.20
03/08/19	447895658663	22.42	05/05/19		447895658663	☐	03/08 22.42
03/09/19	639545599376	13.57	05/05/19		639545599378	☐	03/09 13.57
03/09/19	468938777473	18.81	05/05/19		468938777473	☐	03/09 18.81
03/09/19	437695477565	15.99	05/05/19		437695477565	☐	03/09 15.99

Unapplied Payments & Credits

Date	Reference	Original Amount	Description	Reference		Date & Current Amount
				Please Indicate by ✓ Credits Applied		
02/26/19	563583936766	(12.78)	CR MEMO	563583936766		02/26 0.00
02/26/19	655739775583	(15.06)	CR MEMO	655739775583		02/26 0.00
03/07/19	0002929	(1766.09)	UNAPPLIED PAYMENT	0002929	☐	03/07 (62.06)

Account: 60457 8781 064078 5

Current Invoices:	$ 2526.57	Send payments to: P.O. Box 530958 Atlanta GA 30353-0958
Previously Billed Invoices:	$ 0.00	
Unapplied Payments & Credits:	$ (1793.93)	For billing/general inquiries: PO Box 965055 Orlando FL 32896
		For Customer Service: Call 1-866-634-8381

NO PAYMENT IS DUE

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

AMOUNT ENCLOSED $_____

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

If you have unapplied payments and credits, please call us at 8▮ instructions to apply. You do not need to contact us if you are p▮

> 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

COLR0813 7828 5001 SHG   34 190311 PAGE 000▮

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

amazon.com

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

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L   Date of Sale: 02/20/19
Account :   8781 064078 5   Invoice: 635687636586
Location: 0001   P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0060574259	The Berenstain Bears' Valentin	1.000	EA	6.9900	6.99
MISC	SHIPPING AND TAX	1.000	EA	0.5400	0.54

Subtotal: 7.53   Tax: 0.00   Balance Due: 7.53

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L   Date of Sale: 02/20/19
Account :   8781 064078 5   Invoice: 737367866663
Location: 0001   P.O. :

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

Subtotal: 15.07   Tax: 0.00   Balance Due: 15.07

AMAZON
PO BOX 530958
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L   Date of Sale: 02/20/19
Account :   8781 064078 5   Invoice: 875446976638
Location: 0001   P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0310734894	The Berenstain Bears' Valentin	1.000	EA	3.8300	3.83
MISC	SHIPPING AND TAX	1.000	EA	0.3000	0.30

Subtotal: 4.13   Tax: 0.00   Balance Due: 4.13

-Continue-

COLR0813 7828 5001 SHG   34 190311 PAGE 00025 OF 00057   5534

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

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

amazon.com

Final Details for Order #114-4180994-0737018
Print this page for your records.

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

Shipped on March 8, 2019

Items Ordered   **Price**
1 of: *Mozart's Sister (Women of History) (Volume 1)*, Moser, Nancy $11.99
Sold by: Amazon Digital Services, Inc.

Condition: New

Shipping Address: Item(s) Subtotal: $11.99
                                              Shipping & Handling: $0.00

                                              Total before tax: $11.99
                                                    Sales Tax: $1.05

Shipping Speed: **Total for This Shipment:$13.04**
Two-Day Shipping   -----

Payment information

Payment Method: Item(s) Subtotal: $11.99
Amazon Corporate Credit Line   Shipping & Handling: $0.00

Billing address   Total before tax: $11.99
                                          Estimated tax to be collected: $1.05

                                              Grand Total:$13.04

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

To view the status of your order, return to Order Summary.

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

Attachment W – 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.

Order Date	Order ID	Title	Category	Quantity	Payment Instr	Ordering Cus	Shipment Da	Shipping Address N	Shipping Ad	Shipping Ad	Shipping Ad	Shipping Ad	Shipping Ad	Order Status	Carrier Nam	Item Subtot	Item Subtot	Item Total
10/2/17	111-734175	Studio: Creative Spaces for Creative Peopl	Hardcover	1	Visa - 9818	ill@banning	10/2/17	PATRON NAME	1234 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$23.79	$1.84	$25.63
10/2/17	111-012842	How To Make It in the New Music Busines	Hardcover	1	Visa - 9818	ill@banning	10/3/17	PATRON NAME	1235 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$20.36	$1.58	$21.94
10/4/17	111-742560	Comer atentos (Mindful Eating): Guí×a pa	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1236 BOOK DRIVE			BANNING	CA	92220-3382	Shipped	USPS(93419	$11.52	$0.89	$12.41
10/4/17	111-207089	The Choirboys	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1237 BOOK DRIVE			BANNING	CA	92220-3436	Shipped	USPS(93419	$15.98	$1.24	$17.22
10/4/17	111-183567	The Sword Thief (The 39 Clues, Book 3)	Hardcover	1	Visa - 9818	ill@banning	10/6/17	PATRON NAME	1238 BOOK DRIVE			BEAUMONT	CA	92223-2084	Shipped	USPS(93419	$8.27	$0.64	$8.91
10/4/17	111-249350	Yoga Body and Mind Handbook: Easy Pose	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1239 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$12.90	$1.00	$13.90
10/4/17	111-941478	And Then She Was GONE: A riveting new s	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1240 BOOK DRIVE			BANNING	CA	92220-3441	Shipped	USPS(93419	$7.19	$0.56	$7.75
10/7/17	111-470991	The Creative Home: Inspiring ideas for bea	Paperback	1	Visa - 9818	ill@banning	10/8/17	PATRON NAME	1241 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$22.65	$1.76	$24.41
10/9/17	111-094124	The Great Vegan Bean Book: More than 10	Paperback	1	Visa - 9818	ill@banning	10/10/17	PATRON NAME	1242 BOOK DRIVE			BANNING	CA	92220-3783	Shipped	USPS(93419	$15.16	$1.17	$16.33
10/10/17	111-615884	The Marriage Lie (Thorndike Press Large Pr	Hardcover	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1243 BOOK DRIVE			BANNING	CA	92220-5261	Shipped	USPS(93419	$30.07	$2.33	$32.40
10/10/17	111-970486	Locke & Key, Vol. 6: Alpha & Omega	Paperback	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1244 BOOK DRIVE			BANNING	CA	92220-2410	Shipped	USPS(93419	$13.95	$1.08	$15.03
10/11/17	111-477513	Rainbow Magic Special Edition: Flora the	Mass Mark	1	Visa - 9818	ill@banning	10/12/17	PATRON NAME	1245 BOOK DRIVE			BANNING	CA	92220-2524	Shipped	USPS(93419	$4.22	$0.33	$4.55
10/12/17	111-841428	To All the Boys I've Loved Before	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1246 BOOK DRIVE			BANNING	CA	92220-4649	Shipped	USPS(93419	$10.58	$0.82	$11.40
10/12/17	111-244097	Go Ask Alice	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1247 BOOK DRIVE			BANNING	CA	92220-6127	Shipped	USPS(93419	$16.19	$1.25	$17.44
10/12/17	111-069676	12 Ways to Get to 11 (Aladdin Picture Boc	Paperback	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1248 BOOK DRIVE			BANNING	CA	92220-1928	Shipped	USPS(93419	$6.87	$0.53	$7.40
10/13/17	111-927893	Switch	Paperback	1	Visa - 9818	ill@banning	10/15/17	PATRON NAME	1249 BOOK DRIVE			BANNING	CA	92220-5134	Shipped	USPS(93419	$14.72	$1.14	$15.86
10/13/17	111-793898	The Christmas Chapel	Paperback	1	Visa - 9818	ill@banning	10/14/17	PATRON NAME	1250 BOOK DRIVE			BANNING	CA	92220-5112	Shipped	USPS(93419	$13.52	$1.05	$14.57
10/16/17	111-307070	A Wind In The House Of Islam: How God Is	Paperback	1	Visa - 9818	ill@banning	10/17/17	PATRON NAME	1251 BOOK DRIVE			BANNING	CA	92220-5409	Shipped	USPS(93419	$14.59	$1.13	$15.72
10/18/17	111-158461	The Glitter Dome	Paperback	1	Visa - 9818	ill@banning	10/19/17	PATRON NAME	1252 BOOK DRIVE			BANNING	CA	92220-3436	Shipped	USPS(1ZX46	$14.70	$1.14	$15.84
10/19/17	111-569923	A Memory of Violets: A Novel of London's	Paperback	1	Visa - 9818	ill@banning	10/20/17	PATRON NAME	1253 BOOK DRIVE			BANNING	CA	92220-7151	Shipped	USPS(93419	$11.07	$0.86	$11.93
10/24/17	112-390252	Let's Go for a Drive! (An Elephant and Pigg	Hardcover	1	Visa - 9818	ill@banning	10/24/17	PATRON NAME	1254 BOOK DRIVE			WHITEWATE	CA	92282-3104	Shipped	SUREPOST(1	$8.99	$0.70	$9.69
10/24/17	111-931480	The Lance: The Project: Book Two	Paperback	1	Visa - 9818	ill@banning	10/25/17	PATRON NAME	1255 BOOK DRIVE			BANNING	CA	92220-4520	Shipped	USPS(93419	$10.95	$0.85	$11.80
10/24/17	111-885803	90 Minutes in Heaven: A True Story of Dea	Paperback	1	Visa - 9818	ill@banning	10/26/17	PATRON NAME	1256 BOOK DRIVE			BANNING	CA	92220-1951	Shipped	USPS(93419	$9.02	$0.70	$9.72
10/27/17	111-189406	On a Pale Horse (Incarnations of Immortal	Mass Mark	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1257 BOOK DRIVE			BANNING	CA	92220-1868	Shipped	USPS(93419	$7.99	$0.62	$8.61
10/27/17	111-678336	60 Ways to Lower Your Blood Pressure: W	Paperback	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1258 BOOK DRIVE			BANNING	CA	92220-3607	Shipped	USPS(93419	$8.92	$0.69	$9.61
10/30/17	111-053999	The Seventh Pillar: The Project: Book Thre	Paperback	1	Visa - 9818	ill@banning	10/31/17	PATRON NAME	1259 BOOK DRIVE			BANNING	CA	92220-4520	Shipped	USPS(93419	$10.93	$0.85	$11.78
11/1/17	111-892500	The Widower's Wife: A Thriller	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1260 BOOK DRIVE			BANNING	CA	92220-3441	Shipped	USPS(93419	$17.67	$1.37	$19.04
11/1/17	111-777410	How to Make It: 25 Makers Share the Secre	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1261 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$18.10	$1.40	$19.50
11/1/17	111-312138	String Instrument Setups: 10 Setups That	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1262 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$12.34	$0.96	$13.30
11/1/17	111-531112	Man's Search for Meaning, Gift Edition	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1263 BOOK DRIVE			BANNING	CA	92220-5482	Shipped	USPS(93419	$18.16	$1.41	$19.57
11/2/17	111-282543	The Delta Star	Mass Mark	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1264 BOOK DRIVE			BANNING	CA	92220-3436	Shipped	USPS(93419	$7.99	$0.62	$8.61
11/6/17	111-555335	How to Make Your Band Sound Great: Mu	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1265 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$25.12	$1.95	$27.07
11/6/17	111-794409	Beautiful: All-American Decorating and Ti	Hardcover	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1266 BOOK DRIVE			BANNING	CA	92220-3200	Shipped	USPS(93419	$30.59	$2.37	$32.96
11/6/17	111-388414	Black Harvest: The Project: Book Four (Vol	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1267 BOOK DRIVE			BANNING	CA	92220-4520	Shipped	USPS(93419	$9.95	$0.77	$10.72
11/7/17	111-814889	Autismo (Spanish Edition)	Paperback	1	Visa - 9818	ill@banning	11/8/17	PATRON NAME	1268 BOOK DRIVE			BANNING	CA	92220-3382	Shipped	USPS(93419	$11.52	$0.89	$12.41
11/9/17	111-954624	How Now Shall We Live?	Paperback	1	Visa - 9818	ill@banning	11/9/17	PATRON NAME	1269 BOOK DRIVE			BANNING	CA	92220-4454	Shipped	USPS(93419	$11.67	$0.90	$12.57
11/10/17	111-327436	Cold Tangerines: Celebrating the Extraord	Paperback	1	Visa - 9818	ill@banning	11/10/17	PATRON NAME	1270 BOOK DRIVE			BANNING	CA	92220-4143	Shipped	USPS(93419	$11.81	$0.92	$12.73
11/13/17	111-938430	The Fever Code: Book Five; Prequel (The M	Hardcover	1	Visa - 9818	ill@banning	11/14/17	PATRON NAME	1271 BOOK DRIVE			BANNING	CA	92220-3770	Shipped	USPS(93419	$15.19	$1.18	$16.37
11/15/17	111-105000	The Isle of the Lost: A Descendants Novel (	Paperback	1	Visa - 9818	ill@banning	11/16/17	PATRON NAME	1272 BOOK DRIVE			BANNING	CA	92220-5885	Shipped	USPS(93419	$7.99	$0.62	$8.61

Attachment X – Statistics Reporting Procedures

*The most up-to-date Statistics Reporting Procedures can be found online at
https://northnetlibs.org/statistics-reporting/*

**Zip Books Statistics Reporting Procedures
for FY20-21**

This is an overview of the statistics reporting procedures for all Zip Books libraries, including Zip Books items purchased with local library funds. 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. Instructions are provided below for each tab in the "FY20-21 Zip Books Statistics Reporting Form". This form can be found online at https://northnetlibs.org/statistics-reporting/.

1. Individual libraries are responsible for developing and maintaining their own tool to internally track Zip Books. Sample tracking tools are shared online on the Zip Books website at https://northnetlibs.org/policies-and-best-practices/.

2. Statistics should be tracked from the 1st of the month to the last day of the month.

3. Use the provided Excel spreadsheet titled "FY 20-21 Zip Books Statistics Reporting Form" to compile your library's statistics for the month. Formulas have been built into the form to help your library track your growth over the fiscal year. You can also hover over the question cells to get additional notes on what data should be entered. You may need to scroll the page all the way to the left to see the notes pop-up. Cells with notes will have by a red triangle at the top right corner.

4. The statistics reporting form should be emailed to nuesca@northnetlibs.org by the 15th day of the following month. For example, July's statistics should be submitted by August 15th. Deadlines may be adjusted due to holidays or reporting schedules, and notification will be provided via email.

Monthly Statistics

5. If your library is using grant funds, only two statistics need to be reported 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.

6. Use the "MONTHLY Statistics" tab to report these statistics. Only use the other tabs if they apply to your library's situation.

7. Any comments or feedback received from patrons, such as those that would be captured in patron satisfaction surveys, can be included under Comments/Feedback. Library staff are also encouraged to provide feedback.

Local Library Funded Statistics

8. If your library is using local library funds to supplement your Zip Books program, we ask that you track and report those statistics separately on the "LOCAL LIBRARY FUNDED Statistics" tab. The only statistic that does not need to be tracked separately is the running total of first-time Zip Books customers served since launch. Since it is a running total for your program, the number reported for your local library funded statistics should be the same as it is on your regular monthly statistics.

9. If your library has chosen to expand the normal Zip Books parameters while using local library funds, we ask that you only report the numbers for items that comply with our established parameters. This means that DVDs, music CDs, e-books, and adult fiction best-sellers should not be counted and reported.

10. Libraries should refer to the "Zip Books Procedures for Using Local Library Funding" document for additional information regarding supplementing your Zip Books program. You can find this on the Invoicing page under Zip Books Resources (https://northnetlibs.org/zip-books-resources/).

Optional Statistics

11. Supplemental statistics no longer need to be tracked and reported. Note that April's supplemental statistics for FY19-20 were cancelled due to COVID-19. Instead, these statistics are now optional and can be reported if your library already tracks this data as part of your normal procedures.

12. Use the "OPTIONAL Statistics" tab to report any supplemental statistics that you may track, such as the number of Zip Books items ordered by format or by category. You do not need to complete all the questions listed.

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

Attachment Y – Statistics Reporting Form

The following images show the different tabs included in the Excel spreadsheet that is used to report statistics each month, including "MONTHLY Statistics", "LOCAL LIBRARY FUNDED Statistics" and "OPTIONAL Statistics". The most updated Statistics Reporting Form can be found online at https://northnetlibs.org/statistics-reporting/

	B	C July	D August	E September	F October	G November	H December	I January	J February
	Zip Books Monthly Statistics (rev. 7/31/20)	*Use this tab to report your monthly statistics, which should be tracked from the 1st to the last day of the month*							
	Library Name: **Date Service Launched (first year):**	Month:	Month:	Month:	Month:	Month:	Month:	Month:	Month:
1	Running total of first-time Zip Books customers served since launch:								
2	Number of Zip Books added to library collection this month:								
3	Comments/Feedback (optional):								

MONTHLY Statistics | LOCAL LIBRARY FUNDED Statistics | OPTIONAL Statistics | +

	A	B	C	D	E	F	G	H
1	**Monthly Statistics for Zip Books purchased with local library funds** (rev. 7/31/20)		*Use this tab to report your monthly statistics for __NON-GRANT-FUNDED__ items, wh*					
2	**Library Name:** / **Date Service Launched (first year):**		July	August	September	October	November	December
3	1	Running total of first-time Zip Books customers served since launch:						
4	2	Number of Zip Books ordered this month (COUNT ONLY: items that comply with Zip Books parameters*)						
5	3	Number of Zip Books added to library collection this month: (COUNT ONLY: items that comply with Zip Books parameters*)						
6	4	Total amount of library funds spent this month on Zip Books items: (COUNT ONLY: items that comply with Zip Books parameters*)						
7	5	Comments/Feedback (optional):						

MONTHLY Statistics | LOCAL LIBRARY FUNDED Statistics | OPTIONAL Statistics +

	A	B	C	D	E	F	G	H	I
1	**Optional Supplemental Statistics** (rev. 7/31/20)		*Use this tab to report your supplemental statistics. They are optional but can be reported*						
2	**Library Name:** / **Date Service Launched (first year):**		July	August	September	October	November	December	January
3	4	Total number of Zip Books requests received this month:							
4	5	Of the total number of Zip Books ordered this month, how many were:							
5		Regular print books							
6		Large print books							
7		Audiobooks							
8		Adult fiction/non-fiction							
9		Young adult and children's fiction/non-fiction							
10		Non-English language items							
11	6	Total staff time for Zip Books request processing only (in hours):							
12		[Note: only indicate the time spent processing Zip Books requests which includes any procedures completed before the Zip Book items are returned, do not include time spent on processing items after they are returned to your library or other Zip Books related activitites such as cataloging or compiling/reporting statistics]							
13									
14									

MONTHLY Statistics | LOCAL LIBRARY FUNDED Statistics | OPTIONAL Statistics +