



Administrative Procedures Memorandum

#: APO022

Library System for Board and Schools

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MEMO TO: All Staff

FROM: Director of Education

PURPOSE

The purpose of this memo is to provide standard policies for the configuration, management, and content of the library database for all Board-level and school libraries. When school libraries were automated in 2000, it was apparent that policies were necessary to:

- maximize the strengths of the automated system (such as circulation and searching, inventory and reporting).
- ensure that students and staff have similar and equitable access to library resources at all sites.
- ensure schools are accountable for the money invested in resources by best practices for circulation, use and inventory.
- ensure that improvements required for library automation (such as discarding out-of date and worn library materials, cataloguing standards, and uniform patron records) are sustained.

REFERENCES

- Library Automation Project: Providing Curriculum Support through Resource Management (1999); Automated Library System & Its Impact on Library Services (Report to School Services, November, 1999); Preparing School Libraries for Automation (Report to School Services, March 2000); Various action groups related to library automation: Preparing for Automation Committee, Configuration Working Group, Interlibrary Loans Working Group.
- APB002 Student Fees for Learning Materials and School Activities
- APC036 Freedom of Information and Protection of Privacy Policy
- APO010 Library Collection Development: Selection; Challenged Materials, and Deselection
- APS017 Acceptable Use of Computer Technology and Internet
- Guidelines for School Generated Funds. Ontario Association of School Business Officials, Finance Committee
- The Elements of a Quality Elementary School Library Program (September 2, 2003, Revised June 1, 2007)
- Ontario. Ministry of Education. Safe Schools Act

FORMS

- Form APO022 – Letter to Accompany Resources Borrowed from Another School Library

APPENDICES

- Appendix A – Sample Paragraphs on Overdue Materials and Charges for Inclusion in School or Teacher Handbooks or Form Letter

COMMENTS AND GUIDELINES

The library system was designed so that:

- a central library server operating over the wide area network connects all client computers at each branch. Currently, the Board has over 50 library branches: 45 elementary school libraries, 3 secondary school libraries, the Resource Centre, a branch for the Consultants' Offices (Program Service, Special Education and Experiential Learning/Co-op Education), English as a second language, and NTIP (New Teacher Induction Program). Each branch has access to the online catalogue (PAC), circulation, inventory, and reports.
Note: The school libraries at St. Benedict's and St. Mary's are community libraries with the Cambridge and Kitchener Public Libraries, respectively.
- All branch libraries access a central union database of bibliographic records. The database consists of unique bibliographic records based on an ISBN with many holding lines representing the copies held by the branches.
- All libraries share a common database of patron records. Patron records are the borrower records of students, staff, and the community. Patron records are derived and updated from the Board's employee and student record systems.
- Resources purchased with central or school funds will be catalogued in this database.

Standard policies are required for the configuration, content, use and maintenance of the library database. These policies support the library database and are a foundation for the creation of other library practices as well as library services.

Specific policies are attached as follows:

SECTION	TOPIC
Section 1:	Creation of Bibliographic Records
Section 2:	Creation of Patron Records
Section 3:	Circulation Loan Policies
Section 4:	Interbranch Loan Policies
Section 5:	School Level Responsibilities for the Maintenance of the Union Database
Section 6:	Security of Library Computers
Section 7:	Accountability and Inclusion of Board-Purchased Materials
Section 8:	Overdue Materials and Charges
Section 9:	Library Advisory Committee

Section 1: Creation of Bibliographic Records

BACKGROUND

Prior to library automation, there were over fifty ways of creating records, and circulating materials. The majority of school libraries used card catalogues, most of which were incomplete and outdated. Many collections were not catalogued at all. Less than 30% of the school libraries in the Board were automated, and most software was DOS-based with Y2000-related issues

Over half of the library automation budget and many hours of school staff time were spent preparing libraries for automation, e.g. discarding materials, undertaking inventory, and creating machine-readable cataloguing records.

COMMENT

This policy outlines the standards for how records are created, modified and added to the library database. About 70 staff are authorized to make changes to records in the database. Standards for record creation affect the quality and consistency of the database.

The library database consists of bibliographic records. One record is created for each International Standard Book Number (ISBN). Holding lines attached to a single bibliographic record indicate which branches have copies.

Bibliographic records adhere to international library standards for cataloguing description, subject headings, other standard forms of names, and call numbers.

Consistency is critical to maintain the quality and integrity of the library database.

RECOMMENDATION

- 1.1 All new bibliographic records are created by central cataloguing staff.
- 1.2 Approximately 65% of the new materials purchased by an elementary library are in the union database. Library staff may add their holdings immediately by searching the ISBN and adding their school's holdings line to the existing bibliographic record.
- 1.3 All school branch libraries must use standard item barcodes provided by the Resource Centre.
- 1.4 Training and documentation are provided to library staff to support standard cataloguing processes. Training, which is normally scheduled on professional development days, will follow the **Elements of a Quality Elementary School Library Program**

Section 2: Creation of Patron Records

BACKGROUND

Prior to library automation, secondary student records were derived from the SAS (Secondary Administrative System) student record system. The elementary school libraries checked out books manually, and labouriously tracked overdue resources.

COMMENT

Currently, the data for the patron records is loaded to the library server from files derived through the employee record system, and the student records system. Existing patron records are updated by matching on the ID numbers. Only records for community members, parents, etc. are created at the school or branch level.

There is one borrower's record per person. All libraries in the Board share a common patron record for each borrower. Most borrowers are assigned either a library card, or use the primary ID, i.e. a unique ID assigned for computer and library access. Patron records or borrower records enable students and staff to borrow resources using the library circulation system. It is critical not to create duplicate records for a borrower.

Privacy of information student information is a concern. Access to library computers is restricted to authorized library staff following the guidelines in APS017 Acceptable Use of Computer Technology and Internet. Library cards and/or class lists must be kept in a locked, secure location, and reports with student information must be shredded.

RECOMMENDATION

- 2.1 During the school year, student patron records are automatically updated daily. Employee records are updated regularly on an "as needed" basis.
- 2.2 School library staff may add or modify patron records following the instructions outlined in the online library manual. The intent is to create records in a standard manner.
- 2.3 To identify patron records, elementary school\branch libraries must use either the library cards (provided by the Resource Centre to ensure that library card numbers are unique) or reports listing the barcode of each patron's primary ID number. In the secondary school libraries, student activity cards are used as library cards.
- 2.4 Training and documentation are provided to library staff to support standard patron record creation. Training, which is normally scheduled on professional development days, will follow the **Elements of a Quality Elementary School Library Program**.
- 2.5 Each year, prior to June 20th, library staff are required to review the patron records of all graduating students, i.e. grade 8 or grade 12 students, to clear up outstanding patron transactions, e.g. items checked out, overdue items, charges, etc. Outstanding obligations must be cleared up at the originating school library; however, comments may be left on the student's record.
- 2.6 In order to purge patron records, when a student or teacher transfers to another school or out of the Board, library staff must review all outstanding obligations, e.g. items checked out, overdue items, charges, etc. Issues must be cleared up at the originating school library; however, comments may be left on the student's record. This policy applies to "off roll" students at the secondary level, too.

Section 3: Common Circulation Loan Policies

BACKGROUND

Prior to automation, each school library had its own circulation policies for loan periods, number of items borrowed, renewal periods, fines, and so on. School libraries did not have standard policies for circulation.

COMMENT

With a central library system, it is possible to have standard circulation policies for elementary school libraries, and another for secondary school libraries resulting in:

- Equitable access to library resources for students throughout the school board
- Familiarity and ease of use for students and staff who move from one school to another

Circulation policies need to be flexible enough to accommodate a variety of needs from new school libraries with few resources to libraries with half-time staff and less frequent book exchanges.

RECOMMENDATION

- 3.1 There are standard policies for circulation functions like loan periods, renewals and the number of items borrowed. The policies for elementary and secondary school libraries are available in the library report, "Data Verification – Rules Matrix in Library.Solution". Library staff are able to customize their specific libraries loan policies, if required for a particular situation.
- 3.2 The circulation policies will be reviewed annually to ensure that the policies continue to be flexible enough to meet the needs of all libraries.

Section 4: Interbranch Loan Policies

BACKGROUND

Prior to automation, resources were not catalogued and accessible by other branches; consequently, loans between school libraries were relatively infrequent.

COMMENT

Presently all catalogued resources are searchable through a union database maximizing access to resources. The online public access catalogue is accessed through the Internet at <http://library.wcdsb.ca>.

It is critical to have policies on loans between school branches including the consequences of non-compliance. Public and university libraries have standard loan agreements between their library branches which establish what types of materials may be borrowed, the loan periods, and the consequences of damage or loss.

Interbranch loans are intended to complement local school library collections, not be a substitute for good library collections which meet the routine needs of their users. A school may not borrow the same resources repeatedly but rather purchase their own copies of resources.

All school libraries should be willing to lend to other school libraries if they wish to borrow from them. School libraries which deny loans on certain types of materials cannot reasonably expect other sites to loan these types of materials to them.

Note: Interbranch loan agreements (IBL) differ from interlibrary loan agreements (ILL), which enable one institutional library to borrow resources from another. Interlibrary loan requests are the responsibility of the Resource Centre.

RECOMMENDATIONS

Responsibilities of Requesting Libraries

- 4.1 Library staff must make interbranch loan (IBL) requests on behalf of their teachers and other staff, i.e. library staff will not accept direct requests from teachers who teach in other schools. IBL requests will not be made directly for students, but rather for their teachers.
- 4.2 IBLs are processed through the library system's circulation module facilitating tracking and reports.
- 4.3 Library staff will inform teachers who are requesting to borrow resources from other libraries of their responsibilities to return resources in a timely fashion, and to pay for damaged or lost materials.
- 4.4 School library staff must first exhaust their resources by searching their online catalogue and that of the Resource Centre before requesting materials from other school libraries.
- 4.5 It is the responsibility of the requesting library to verify the accuracy of the information requested and to complete an Interbranch Loans Form, or e-mail. E-mails must include the call number, title, author, and borrowing teacher's name. Potential lending libraries may not reply to poorly defined IBL requests. Automated "holds" from another school branch are not acceptable practice.
- 4.6 All requests must be made for a specific item in a specific library. A blanket e-mail is not acceptable (i.e. "looking for 12 copies of The Outsiders"). If the purpose of the request is to accumulate multiple copies of a specific novel, the requestor should contact only those libraries, which have copies of that title. (See 4.16 regarding Novel Sets)
- 4.7 Requested items are checked out to the teacher for whom the IBL request is made. Items to be loaned, which are in a sub-standard condition, should have the condition noted in the Condition field of item record [in the Library.Solution Circulation, Item/Title Tab, Bibliographic screen] prior to circulation.
- 4.8 The items are shipped by courier to library staff in the requestor's school. Library staff will then give the items to the staff member for whom it was requested.
- 4.9 Library technicians, while not personally responsible for overdue, lost or damaged materials, have a responsibility to ensure that IBL materials are returned to the lending library on the due date. Library technicians will also work with their principal to resolve issues pertaining to resources borrowed from other school libraries.
- 4.10 The standard loan period is three weeks including courier/travel time. If an extended loan period is required, it should be indicated in the ILB loan request, e.g. 6 to 8 weeks. At the discretion on the lending school, a renewal period of one week is possible.
- 4.11 Materials borrowed through IBL must be returned to the borrower's school library. Then, library staff will take the item to the courier location for return to the lending school library.
- 4.12 The requesting school will pay for materials which are lost in transit or by the borrower. The cost is outlined in the current bibliographic sources such as Titlewave, Amazon.com or the publisher's catalogue, plus taxes and a \$5.00 processing charge. If the same material cannot be replaced,

the owning library may charge a default price. The payment required for damaged materials is the decision of the lending library.

- 4.13 Payment must be made for lost or damaged materials to the lending library within 30 days of receiving written notice. The principal may make payment from the school's budget or charge the individual teacher personally

Responsibilities of the Lending Libraries

- 4.14 The lending library may not recall materials on loan to other branches in the middle of a loan period. However, the lending library will not renew materials which have been requested by their own staff.
- 4.15 Lending library resources is at the discretion of the principal. A library may refuse to lend resources without explanation.
- 4.16 Restrictions are in place on borrowing library resources if the items:
- are known or expected to be needed by staff of the loaning school during the requested loan period.
 - would constitute the majority of items available in a given subject will not be loaned, e.g. four books on penguins when there are only five titles in the library
 - were purchased or catalogued in the last 12 months.
- 4.17 In many school libraries, there are restrictions on interbranch loans of the following types of materials:
- **Core resources** such as leveled literacy materials, which were purchased for all school libraries
 - **Ephemeral or bulky materials** – materials which will put an undo strain on the courier van must be picked up and returned in person
 - **Journals/Periodicals (MAG)** – not loaned. (The Resource Centre will copy articles; however, many journals are available electronically through EZ Find's online databases).
 - **Novel sets for novel study (versus individual books)**
 - **Out of print or difficult to obtain titles** – If lost, these materials are not readily replaceable.
 - **Popular/high-demand titles/recent** - Popular and seasonal materials are not available on interlibrary loans.
 - **Reference (REF)** – not loaned.
 - **Textbooks (TEX)** –not catalogued in the library system.
 - **Video recordings** – Videos and DVDs in school collections are not licensed for use in another school. The Resource Centre houses the central collection of videos, which are licensed appropriately for system-wide and public use.
- 4.18 A school may not repeatedly borrow the same resources from other school libraries, but recognize the need to purchase their own copies of resources. It is recommended that each school library maintain a record of materials borrowed from other branches as well as the materials lent to other branches.

Section 5: School-Level Responsibilities for Maintenance of the Union Database

BACKGROUND

To get library collections ready for automation, extensive preparation was required. The card catalogues

were inaccurate. The main tasks were discarding materials, inventory, and creating automated records. School library staff and additional casual staff worked thousands of hours on retrospective conversion-related tasks.

COMMENT

Without a policy in place to ensure that maintenance of the union database occurs, the automated libraries will quickly revert to their pre-automated condition. Just like the card catalogues, the library database will become relatively worthless unless regular maintenance is practiced by all branches.

Schools must assume responsibility for the maintenance of their library collections through quality acquisitions; consistent data entry; discarding lost, damaged or out-dated materials, and inventory.

RECOMMENDATIONS

- 5.1 During the normal workweek, principals will allot sufficient time in the library schedule for library staff to undertake maintenance and administrative tasks. For example, maintenance functions may be scheduled for after school dismissal or every Friday.
- 5.2 For elementary school libraries, **circulation will cease by the end of the first week of June.** Materials must be returned to the library by that date. Materials on long-term loan to classrooms, e.g. literacy materials, must be returned to the library for inventory. The Resource Librarian will send e-mail reminders to all elementary school users before the beginning of June reminding everyone of library inventory. Secondary school libraries, which are staffed in July and/or August, may undertake inventory later in the summer.
- 5.3 Inventory is a complex, multi-step process. During inventory time, principals are requested to schedule the library space so the library technician is not constantly interrupted from inventory for non-library uses of the facility e.g. computer labs, year-end functions, etc.
- 5.4 At minimum every two years, library staff will systematically review and discard (i.e. "weed") materials from each library collection based on condition and relevance to the collection. Specific guidelines are provided in the document, "**Weeding Guidelines by Dewey Classification**" (APO 010, Appendix B).
- 5.5 Inventory and database cleanup must be completed within a two-year period. At least one week of dedicated time is required to undertake inventory. More time is required for inventory if the library collection is large or in poor condition. Although professional, document or kit subcollections are relatively small, their inventory is time-consuming due to the diverse, multi-part nature of these resources.
- 5.6 Prior to starting inventory each year, library staff run reports identifying all lost and missing materials from the previous year, and check the library again for the missing materials. The principal may be informed and/or assist in locating lost and missing items. With the exception of professional resources, i.e. PRO collection, if these items cannot be located, delete them before starting inventory.
- 5.7 Portable inventory scanners may normally be reserved for one week per school in June; however, library technicians working in two half-time school libraries may book the portable inventory

scanner for two weeks at a time. Inventory scanners are readily available during the other months of the school year.

- 5.8 For subcollections over 199 items, inventory must be undertaken using a portable inventory scanner, not through a manual count.
- 5.9 For schools with half-time library technicians, the Resource Centre will provide assistance up to 2.5 days per school, if required. The Resource Librarian will determine the need for assistance.
- 5.10 If these tasks are not completed to standard within a two-year period, schools will be charged for the cost of cleanup discarding materials, inventory, updating the database, and weeding resources.
- 5.11 After inventory, library staff must complete the following:
- a) the Inventory Summary Form for their school branch by the first full-week of December each year. Forward this form with the relevant library reports to the Resource Librarian. Please give a copy of the summary sheet to your principal.
 - b) If manual inventory was undertaken for some collections under 199 items, also send the shelf list report(s), which were used as worksheets, to the Resource Librarian.
 - c) include the Items in a selected holdingscode by call number range report [worksheets] for each collection, which was systematically weeded.
- 5.12 Every January, Resource Centre staff will submit a summary, overview report to the Superintendent of Learning: Instruction and Assessment JK – 12. The report will include statistics on lost, missing and deleted materials, age of the collection as well as new acquisitions for each school library. After discussion, this information will be provided to principals and senior administrators, who will review the findings and determine what response is appropriate in their school.

For inventory of AV equipment

- 5.13 Due to the high cost of AV equipment, inventory of AV equipment must be undertaken each year by library staff at the elementary school level. (For schools with half-time library staff, please contact the Resource Centre if assistance is required to complete AV equipment inventory).
- 5.14 Each June, library staff in elementary schools will generate a report listing the AV equipment held by their elementary school using the library system. The Resource Centre will generate the same reports for secondary school departments and Board departments.
- 5.15 Each June, the AV equipment in each elementary school will be collected in one central location, e.g. school library, in order to facilitate the summer maintenance check and cleaning. Maintenance checks of AV equipment held by secondary schools are undertaken in the March break, Christmas holidays, and June.
- 5.16 Over the summer, Resource Centre staff will notify each elementary school principal and library staff by e-mail when the summer maintenance check has been completed.
- 5.17 By the end of each September, library staff must send a revised AV equipment list with items marked M (missing) or L (lost) to the Resource Librarian and to the school principal as part of the annual inventory summary outlined in 5.11.

Section 6: Security of Library Computers – Elementary Schools Only

BACKGROUND

Prior to library automation, nine school libraries had automated library systems including circulation. The library software was installed on the school servers operating over the educational network. Schools were responsible for their own backups. Hacking into library databases and lack of current backups were issues at the elementary and secondary levels. At least two elementary school libraries had to rebuild their circulation databases.

COMMENT

The current library system operates over the wide area network on the administrative network. Principals, secretaries and Board Office staff use this network. Use of this system is subject to the APS017: Computer Network and Internet Use.

Library database security is complicated by policies related to the staffing of elementary school libraries:

- About one third of libraries are staffed part-time.
- When library technicians are absent from work, supply coverage not provided for multiple days.

In recognition of this staffing issue, specific logins have been created for both the network and circulation when library staff are absent. In this mode, a student has the ability to wand their library card, and checkout library materials, only. There is another login, which enables an employee to check-in resources only.

RECOMMENDATIONS

- 6.1 Students may not use the library unless a responsible adult supervises them.
- 6.2 **An adult must be present when students are using any computer. Students may not use the circulation software unsupervised.**
- 6.3 Do not share regular network and library log ins and passwords with staff and students. Similarly, do not post passwords for the convenience of staff or students. To quote from AP017: “A user who provides someone else access to the Board’s Wide Area Network via their account by giving them their login/password (account) or shared access shall loose their access rights”.
- 6.4 Specifically, do not use the regular network and library logins and passwords when library staff are absent. **Circulation training is mandatory for all users of the circulation module including casual staff covering regular library staff.**
- 6.5 Book exchanges by classes must be scheduled during the regular working hours of the library technician.

When Library Staff are Absent/Part-Time Schools

- 6.6 Library technicians may give the generic network password and the generic circulation password to two other staff, e.g. site administrator, school secretary. Do not share this information with all staff including casual library staff or helpers.

- 6.7 Do not leave the network and circulation open when circulation is not being used. Pressing <CTRL-ALT-DEL> will open a dialogue box where a user can lock the computer rather than shut down or log off all applications.
- 6.8 When borrowing materials after the regular work hours of library staff, teachers and other borrowers are required to record the loan information manually in a sign-out book or leave the book cards with their name on the library desk. The information will be entered into the automated library system by the library technician.

Section 7: Accountability & Inclusion of Board-Purchased Materials in Database

BACKGROUND

There was, and continues to be, a lack of consistency in the cataloguing for resources purchased through Board and school funds. This inconsistency has resulted in the loss of resources as employees retire, move from one school to another, or change responsibilities.

COMMENT

This policy addresses the cataloguing and circulation of resources purchased through central or school funds. Cataloguing of resources increases accountability for resources, positively affects the comprehensiveness of the library database, and enables more staff and students to locate and use more resources

Cataloguing of resources does not restrict users from housing resources in non-library locations or borrowing resources for extended periods of time. **It does clearly indicate that the resources are under the stewardship of a specific school branch, and not the property of a single individual.**

RECOMMENDATIONS

- 7.1 All materials purchased for schools by Program Services, Student Services and other central departments are catalogued before distribution to the school libraries. Resources will not be distributed to individual teachers for their personal use rather it's a school-resource.
- 7.2 All resources purchased through school funds will be catalogued regardless of location, with the exception of items listed in 7.3 and 7.5. Materials housed in the school library, professional resource room, reading room, and other school locations will be catalogued and circulated through the library system. **Textbooks** are not catalogued in the library system.
- 7.3 Generally, materials purchased exclusively for classroom use (i.e. classroom libraries) will not be individually catalogued. Classroom libraries may be catalogued as "kits" with a contents list of the individual titles in the kit, workload and time permitting.
- 7.4 Each elementary and secondary library will catalogue one copy of each curriculum document produced by the Ministry of Education and the Board to be housed in the library.
- 7.5 **Ministry and Board curriculum documents**, which are used by individual teachers, will not be catalogued. After the initial distribution of curriculum documents, schools are charged for additional copies following APO020.

Section 8: Overdue Materials and Charges

BACKGROUND

Prior to automation, the management of overdue library materials and charges varied considerably from elementary school to elementary school with some schools generating overdues weekly, and others generating overdues infrequently. Some elementary school libraries charged for lost materials and others choose not to charge for them.

At the secondary school level, consistent circulation policies relating to fines for overdues and charges for materials lost by students was in place when the library system was implemented.

COMMENT

There are a number of reasons why common policies on handling overdue library materials and charges are required.

Students and staff are governed by a common policy outlining their responsibilities when they borrow library materials which are the property of the Board. Library staff may charge fees for the “cost of recovery for the replacement or repair of lost, damaged, or broken materials” such as library books.

Library staff are aware of the amount and value of lost and missing materials. By producing overdue reports regularly, the number of lost or missing materials is reduced.

With the implementation of a central library system, inconsistencies in patron records and outstanding obligations (overdues, fines and charges) affect the functioning of all school libraries. Patrons carry their overdue and charge transactions with them when they graduate from elementary school, or transfer to another school within the Board. Due to security restrictions allowing library staff to access their branch only, these outstanding obligations on a patron’s record cannot be resolved by his/her new school library.

RECOMMENDATIONS

These recommendations apply to both the elementary and secondary panels.

- 8.1 In September of each school year, students and teachers must be informed of the school library’s policies for overdue materials, lost or damaged materials, and charges. Library patrons may be informed through the school’s handbook, the teacher’s handbook, the Welcome to Kindergarten booklet, a form letter, library orientation, etc. If staff are to be billed for lost items, they must be informed at the beginning of the school year.
- 8.2 At a minimum, every two weeks, library staff are required to generate overdue and charges reports using the library system. These reports are distributed to students, staff and/or parents, respecting confidentiality of information provisions.
- 8.3 Charging fines for overdue materials is not recommended in elementary libraries; however, an individual principal may elect to charge fines to students or staff.
- 8.4 Charging fines for overdue materials is standard practice for secondary school students. The fine is normally 25 cents per day for print and non-print materials.
- 8.5 After materials have been overdue for 30 days, a long overdue letter will be sent to the student’s parents using a report from the library system. (Some schools may elect to contact parents sooner).

- 8.6 Forty-five (45) days after the materials are due; library staff will change the item status from “overdue” to “lost” in the library database. (Do not delete the lost materials immediately as the lost and missing data is required for library reports).
- 8.7 Both students and staff are accountable for paying for lost or damaged materials. Parents are responsible for paying for materials lost or damaged by their child(ren).
- 8.8 Payment for lost or damaged materials may be based on the a) replacement value of the material plus processing charges, b) set charges for paperbacks and hardcover books, c) actually purchasing a replacement copy, etc. Work assistance may be accepted in lieu of payment. The principal decides which method of payment is acceptable. For payments by cheque, please make cheques payable to the school’s library budget. Library staff should make two copies of each payment slip, one for the patron, the other for the library’s records. Fees should be kept in a secure place.
- 8.9 All library payments must follow standard accounting practices. When \$100 in fees have been collected or once per school term if less funds collected, fees and charges accumulated by school library staff must be given to the administrative assistant or budget secretary using the “School Generated Funds, Collection of Fees Form” or equivalent school form. The administrative assistant will then transfer the fees to the appropriate budget line.
- 8.10 If the patron finds the “lost” materials at a later date, school libraries are not required to give a refund to the patron, but may do so at their discretion.
- 8.11 Library staff have the right to restrict the borrowing privileges of patrons with outstanding transactions such as overdue materials, charges, etc. For example, until overdue books are returned and charges paid, the library patron may be asked to limit use of materials to the library, not take them home.
- 8.12 Depending on circumstances, a principal may waive charges in whole or in part for both students and staff. For long outstanding issues, principals will consider each situation on an individual basis weighing accountability against equity. In order to facilitate the resolution of outstanding library transactions for students, principals may contact parents directly, disable the students’ computer login, or take other legal actions to recover costs.
- 8.13 Transcripts, computer logins, etc. may not be withheld from students who have not paid the outstanding fees or charges.

Section 9: Library Services Advisory Committee

BACKGROUND

In 2002, a Library *Automation* Advisory Committee was established to ensure that the policies outlined in APO022 continued to evolve to meet the needs of libraries in the Board. From the discussions of this Committee, it became clear that the development of automation policies and standards have an impact on and are related to all library services provided to students and staff.

COMMENTS

The Library Services Advisory Committee is an outgrowth of the Library Automation Advisory Committee. It recognizes the need for a wider mandate to ensure that future library policies, not only related to

automation, evolve to meet the changing needs of library users.

RECOMMENDATION

- 9.1 That a Library Services Advisory Committee is formed which meets at least once per term to a) respond to, validate, and advance the library automation system, its use, and maintenance, and b) review library services provided to staff and students in the elementary and secondary panels.

TERMS OF REFERENCE

- 9.2 To make recommendations for Action Teams, which respond to specific needs.
- 9.3 To review and rank requests for improved software functionality to be forwarded to the automation vendor.
- 9.4 To review and make recommendations on the procedures outlined in Help documentation.
- 9.5 To make recommendations on new initiatives related to the library system.
- 9.6 To review library policies and procedures, and make recommendations on library services, which are outlined in **The Elements of a Quality Elementary School Library Program**.
- 9.7 To update the AP policy memorandum.

MEMBERSHIP

- 9.8 That the Library Automation Advisory Committee consist of:
- 1 Elementary school principal (resource to committee)
 - 4 or more Library technicians (including at least one part-time technician)
 - 1 Secondary librarian
 - 1 Technology Literacy Consultant (resource to committee)
 - 1 Resource Librarian
 - 1 Cataloguer
 - 1 Information Services employee (resource to committee)
 - 1 Coordinator of Instruction and Assessment JK – 6 or 7 - 12 (resource to committee)

Letter to Accompany Resources Borrowed from Another School Library

These resources have been borrowed from another school library on your behalf; consequently, the books may be stamped with the property stamp on another library.

It is important that you return the following material(s) to your school library.

Title	Date to be Returned
1. _____	_____
2. _____	_____
3. _____	_____

If you require the materials for a longer period than indicated, please contact your library technician/librarian before the item is due.

The procedures for Interbranch Loans are outlined in AP022, Section 4 on Interbranch Loans. Borrowers should be aware that in borrowing resources from another school library is a privilege, and that they are responsible for the timely return of materials.

Specifically,

Payment for Lost, or Damaged Materials

4.12 The requesting school will pay for materials which are lost in transit or by the borrower. The cost is outlined in the current bibliographic sources such as Titlewave, Amazon.com or the publisher’s catalogue, plus taxes and a \$5.00 processing charge. If the same material cannot be replaced, the owning library may charge a default price. The payment required for damaged materials is the decision of the lending library.

4.13 Payment must be made for lost or damaged materials to the lending library within 30 days of receiving written notice. The principal may make payment from the school’s budget or charge the individual teacher personally

Cancellation of Borrowing Privileges

4.15 Lending library resources is at the discretion of the principal. A library may refuse to lend resources without explanation.

Sample Paragraphs on Overdue Materials and Charges for Inclusion in School or Teacher Handbooks or Form Letter

Following policy 8.1 of Section 8: Overdue Materials and Charges, it is recommended that students and staff be informed of the school library's policies for overdues, lost or damaged materials, and charges.

These paragraphs may be modified for inclusion in your school handbook, and/or sent to parents as a separate letter.

The library is open Monday to Friday from 9:00 a.m. to 4:00 p.m. [Part-time schools will have reduced hours].

Students in JK/K may borrow one book for a period of one week. They may exchange books at any time that library staff is present.

Primary students (junior kindergarten to grade 3) are required to transport their library books to and from school in a book bag to protect books from damage.

Students from grade 1 to 8 may borrow one fiction book and two non-fiction books at a time. The loan period is two weeks.

Students are requested to return the books within the designated loan period in order to ensure that as many students as possible have access to resources.

Library materials, which are lost or damaged, must be paid for or replaced to the satisfaction of library staff following Board policy APO022. According to section 8.7 of this policy, students and teachers are responsible for paying for lost or damaged library materials. Parents are responsible for paying for materials lost or damaged by their child.

The borrowing privileges of library patrons with outstanding overdues or charges are subject to restrictions until the account is cleared.