



Library System for Board Office and Schools

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Memo To: All Staff
From: Director of Education

ACCESSIBILITY:

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PURPOSE:

The purpose of this memo is to provide standard policies for the configuration, management, and content of the library database for all Waterloo Catholic District School Board ("the Board") level libraries and school libraries.

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
- APO010 Library Collection Development
- APS017 Responsible Use of Information Technology and Electronic Data
- APB004 School Generated Funds and Fundraising
- The Elements of a Quality Elementary School Library Program (2nd edition, May 2017)
- Ontario Ministry of Education, Safe Schools Act

FORMS:

- APO022-01F: [Interbranch Loans](#)

REPORTS:

- N/A

APPENDICES:

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



COMMENTS AND GUIDELINES:

The integrated 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: 43 elementary school libraries, 3 secondary school libraries, The Learning Commons, Catholic Education Centre ('CEC'), formerly 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 Public Access 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 International Standard Book Number ('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 1: Creation of Bibliographic Records

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 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

- All new bibliographic records are created by central cataloguing staff.
- Approximately 65% of the new materials purchased by an elementary library learning commons are in the union database. Library Technicians and Secondary Librarians may add their holdings immediately by searching the ISBN and adding their school's holdings line to the existing bibliographic record.

- All school branch libraries must use standard item barcodes provided by The Learning Commons, CEC.
- 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 2nd ed.**

Section 2: Creation of Patron Records

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 WCDSB (Waterloo Catholic District School 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 student information is a concern. Access to library computers is restricted to authorized Library Technicians and Secondary Librarians following the guidelines in Responsible Use of Information Technology and Electronic Data (APS017). Library cards and/or class lists must be kept in a locked, secure location, and reports with student information must be shredded.

RECOMMENDATION

1. During the school year, student patron records are automatically updated daily. Employee records are updated regularly on an "as needed" basis.
2. Library Technicians and Secondary Librarians 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.
3. To identify patron records, elementary school\branch libraries must use either the library cards (provided by The Learning Commons, CEC to ensure that library card numbers are unique) or reports listing the barcode of each patron's primary ID number. In secondary school libraries, student activity cards are used as library cards.
4. Training and documentation are provided to Library Technicians and Secondary Librarians 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 2nd ed.**
5. Each year, prior to June 20th, Library Technicians and Secondary Librarians 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.

6. In order to purge patron records, when a student or teacher transfers to another school or out of the Board, Library Technicians and Secondary Librarians 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 also applies to "off roll" students at the secondary level.

Section 3: Common Circulation Loan Policies

Standard circulation policies for the integrated library system achieve:

- 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

- There are standard policies that apply to all schools for circulation functions such as loan periods, renewals and the number of items borrowed.
- 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

All catalogued resources are searchable through a union database maximizing access to resources. The online PAC is accessed through the Internet at: <http://library.wcdsb.ca:8080/#section=home> .

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 Learning Commons, CEC.

Responsibilities of Requesting Libraries

1. Library Technicians and Secondary Librarians 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. A copy of [Interbranch Loans](#) (APO022-01F) must be given to the borrower along with the resources.
2. IBLs are processed through the library system's circulation module facilitating tracking and reports.
3. Library Technicians and Secondary Librarians 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. Library Technicians and Secondary Librarians must search their school's online catalogue and that of The Learning Commons, CEC before requesting materials from other school libraries.
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.
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.
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 prior to circulation.
8. The items are shipped by courier to library staff in the requestor's school. Library Technicians and Secondary Librarians will then give the items to the staff member for whom it was requested.
9. Library Technicians and Secondary Librarians, 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 and Secondary Librarians will also work with their Principal to resolve issues pertaining to resources borrowed from other school libraries.
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.
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.
12. The requesting school will pay for materials which are lost in transit or by the borrower.
Payment may be based on:
 - a. Replacement value of the material plus processing charges
 - b. Default charges for paperbacks and hardcover books
 - c. Actually, purchasing a replacement copy etc.

The payment required for damaged materials is the decision of the lending library.

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

1. 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.
2. Lending library resources is at the discretion of the Principal. A library may refuse to lend resources without explanation.
3. Restrictions are in place on borrowing library resources if the items:
 - a. Are known or expected to be needed by staff of the loaning school during the requested loan period.
 - b. 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
 - c. Popular/high-demand titles/recent - popular and seasonal materials are not available on interlibrary loans.
 - d. Were purchased or catalogued in the last 12 months.
4. In many school libraries, there are restrictions on interbranch loans of the following types of materials:
 - a. **Core resources** such as leveled literacy materials, which were purchased for all school libraries.
 - b. **Ephemeral or bulky materials** – materials which will put an undo strain on the courier van must be picked up and returned in person.
 - c. **Journals/Periodicals (MAG)** – not loaned. (The Learning Commons, CEC will purchase articles online on request; however, many journals are available electronically through online databases on the Virtual Learning Commons).
 - d. **Novel sets for novel study (versus individual books)**
 - e. **Out of print or difficult to obtain titles** – If lost, these materials are not readily replaceable.
 - f. **Reference (REF)** – not loaned.
 - g. **Textbooks (TEX)** –not catalogued in the library system.
5. 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

It is imperative to maintain the integrity of the union database, regular maintenance must be 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

1. During the normal workweek, Principals will allot sufficient time in the library schedule for Library Technicians and Secondary Librarians to undertake maintenance and administrative tasks. For example, maintenance functions may be scheduled for every Friday morning.
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. Some resources may be still in use by teachers, these are to be returned as soon as possible. The Library Support Services Supervisor will send e-mail reminders to all Library Technicians before the beginning of June reminding them about library inventory. Secondary school libraries, which are staffed in July and/or August, may undertake inventory later in the summer.
3. During inventory time, Principals are requested to limit scheduling in the library learning commons, so the Library Technician is not constantly interrupted from inventory for non-library uses of the facility e.g., volunteer teas, year-end functions, etc.
4. At minimum, every two years, Library Technicians and Secondary Librarians will systematically review and discard ('weed') materials from each library collection based on condition and relevance to the collection. Specific guidelines are provided in Weeding Guidelines by Dewey Classification (APO010-BX). The Library Support Services Supervisor will monitor system wide weeding.
5. Inventory and database clean up 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.
6. Prior to starting inventory each year, Library Technicians and Secondary Librarians 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.
7. Real Time Inventory is the preferred inventory method. The online library manual (available through Microsoft Teams) explains the Real Time Inventory procedure.
8. For sub collections over 199 items, inventory must be undertaken using a portable inventory scanner, not through a manual count.
9. For schools with half-time Library Technicians, The Learning Commons, CEC will provide assistance up to 2.5 days per school, if required. The Library Support Services Supervisor will determine the need for assistance.
10. After inventory, Library Technicians and Secondary Librarians must complete the following:
 - a. The Inventory Summary Form for their school branch by September 30th. Library Technicians and Secondary Librarians will forward this form with the relevant library reports to the Library Support Services Supervisor. Library staff will give a copy of the summary sheet to their 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 Library Support Services Supervisor.

11. Once a year, the Library Support Services Supervisor will submit a summary, overview report to the appropriate superintendent. 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 a Senior Administrators, who will review the findings and determine what response is appropriate in their school.

Section 6: Security of Library Computers – Elementary Schools Only

The integrated library system operates over the wide area network on the administrative network. Principals, Administrative Assistants and Board Office staff use this network. Use of this system is subject to Responsible Use of Information Technology and Electronic Data (APS017).

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

- More than 20% of elementary libraries are staffed part-time.
 - When Library Technicians are absent from work, supply coverage is not provided for multiple days.
1. Students may not use the library unless a responsible adult supervises them. An adult must be present when students are using any computer.
 2. **Students may not use the integrated library system or the administrative network due to privacy concerns.**
 3. Do not share regular network and ILS log ins and passwords with staff and students. Similarly, do not post passwords for the convenience of staff or students.
 4. Specifically, do not use the regular network and ILS logins and passwords when Library Technicians are absent. **Circulation training is mandatory for all users of the circulation module including casual staff covering for Library Technician absences.**
 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

Library Technicians and Secondary Librarians will not leave the network and integrated library system open when circulation is not being used. Pressing the Windows key and L will lock the computer rather than shut down or log off all applications.

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 integrated library system by the Library Technician.

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

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.

There 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.

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.**

- 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, it is a school resource.
- All resources purchased through school funds will be catalogued regardless of location, except for items listed below. 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.**
- 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.
- **Print copies of Ministry and Board curriculum documents**, which are used by individual teachers, will not be catalogued.

Section 8: Overdue Materials and Charges

This section applies to elementary and secondary libraries.

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.
2. At a minimum, every two weeks, Library Technicians and Secondary Librarians are required to generate overdue materials and charges reports using the library system. These reports are distributed to students, staff and/or parents, respecting confidentiality of information provisions. The goal is to reduce the number of lost and missing materials with regular overdue notices.
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.
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.
5. After materials have been overdue for 30 days, a long overdue letter will be sent to the student’s parents using a report generated by the integrated library system. Some schools may elect to contact parents sooner.

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.
Note: Do not delete the lost materials immediately as the lost and missing data is required for library reports.
7. Both students and staff are accountable for paying for lost or damaged materials according to Student Fees for Learning Materials and School Activities (APB002). Parents are responsible for paying for materials lost or damaged by their child(ren).
8. Payment for lost or damaged materials may be based on the following:
 - a. replacement value of the material plus processing charges
 - b. set charges for paperbacks and hardcover books
 - c. purchasing a replacement copy, etc.

Work assistance may be accepted in lieu of payment.

The Principal will ensure School Cash Online (SCO) is accessible to families. Library Technicians and Secondary Librarians will provide the Administrative Assistant (Elementary) or the Finance Administrative Assistant (Secondary) with the student name, title of the book or other resource, and the amount(s) owed. The Administrative Assistant or Finance Administrative Assistant will post the charge on SCO with all proceeds of payment being recorded to the Library / Learning Commons category. If necessary, the Administrative Assistant or Finance Administrative Assistant may issue a cheque to reimburse the school Library / Learning Commons budget. It is preferable to issue a cheque once or twice a year, rather than for each replacement fee.

9. All library payments must adhere to procedures outlined in School Generated Funds and Fundraising (APB004). If any students or families qualify to be exempt from using School Cash Online, Library Technicians and Secondary Librarians will collect and count money from students or other sources as required. Personal cheques **shall not** be accepted. Library Technicians and Secondary Librarians will complete APB004-01F Funds Received to be accompanied with all money submitted to the Administrative Assistant or Finance Administrative Assistant.
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.
11. Library Technicians and Secondary Librarians 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.
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. To facilitate the resolution of outstanding library transactions for students, Principals may contact parents directly, or take other legal actions to recover costs.
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

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. LAC (Library and Archives Canada) is a forum to review library services provided to staff and students in the WCDSB.

The Library Services Advisory Committee meets at least once per term to:

- respond to, validate, and advance the library automation system, its use, and maintenance, and
- review library services provided to staff and students in the elementary and secondary panels

TERMS OF REFERENCE

1. To make recommendations for Action Teams, which respond to specific needs.
2. To review and rank requests for improved software functionality to be forwarded to the automation vendor.
3. To review and make recommendations on the procedures outlined in Help documentation.
4. To make recommendations on new initiatives related to the library system.
5. 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 2nd ed.**
6. To update the AP (Administrative Procedures) policy memorandum.

MEMBERSHIP

The Library Automation Advisory Committee consist of:

- 1 Elementary Principal when appropriate (resource to committee)
- 4 or more Library Technicians (including at least one part-time technician)
- 1 Secondary Librarian
- 1 Learning Innovation Consultant (resource to committee)
- 1 Library Support Services Supervisor
- 1 Cataloguer
- 1 Information Technology employee (resource to committee)
- 1 Coordinator of Instruction and Assessment JK – 6 or 7 - 12 (resource to committee)
- Other WCDSB employees may be asked to provide information to the Committee when topical e.g. Finance Department, Literacy Consultant etc.