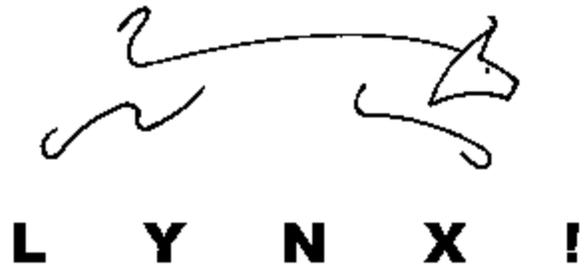


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Important Facts  
You Need to Know  
About Joining the  
**LYNX!**  
Consortium

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Revised 01/01

Revised 10/08

## **I. INTRODUCTION**

In the late 1970s, the Directors of the Boise, Caldwell, Nampa and Twin Falls libraries joined together to share the costs of an automated circulation system. In 1995, when growth necessitated a change, a contract was signed to purchase a new Dynix integrated online catalog system and the LYNX! Consortium came online in March 1996. During this migration, the method of communication by the libraries to the online catalog system was changed from direct phone lines to local area networks within each library attached to frame relay links. Access to the Internet was also added at this time.

In August of 1996, the Meridian Library District was the first new library to be accepted for membership and came online in February, 1997. Eagle and Garden City Public Libraries applied for and were accepted for membership in the fall of 1998. Ada Community Library and Hailey Public Library were both accepted for membership in early 1999. Mountain Home Public Library was accepted for membership in 2006 and came on-line in May 2007, bringing the total number of libraries in the Consortium to the current ten.

Over the years the member libraries have grown and together kept pace with the vast changes in technology. LYNX! Consortium migrated to the SirsiDynix Horizon ILS in September of 2006. ILS costs continue to be equitably shared among the members under a formula based on annual circulation, number of holdings and number of staff terminals of each member library. ILS costs include maintenance, hardware and software upgrades, and system administration.

LYNX! operates under an open access agreement; libraries agree to provide lending services to the patrons of each Library as if the patron requesting lending services in a Library were a resident of the jurisdiction in which the patron is seeking lending services and compensation agreements are in place where one Library regularly provides more than 10% of its total lending to patrons of another's jurisdiction. Materials are shared between member libraries. Members also have an option to participate in shared courier service which facilitates transfer of materials between libraries. The current LYNX! Consortium works together in ways that go beyond simply a shared ILS. For the past few years, LYNX! members have worked together to coordinate summer reading and other youth services programming, and are regularly examining other resource sharing opportunities, such as group database purchasing, to benefit our communities. While member libraries work together to coordinate services, each institution remains autonomous and continues to cultivate their local identity.

In FY2006, LYNX! Consortium combined holdings totaled 1,172,016. Members circulated 4,238,790 items, and over 800,000 items moved between the seven member libraries participating in courier service.

In the pages that follow we have tried to outline helpful information about the LYNX! Consortium and the ILS that we share. It is our hope that we are providing a clear picture of the process, expectations and requirements and benefits for joining the LYNX! Consortium. A copy of the current contract, honored by all members of the LYNX! Consortium, appears as *Appendix B*.

Libraries interested in more information about Consortium activities or in joining the LYNX! Consortium are invited to contact Luise House, Consortium meeting chair at [lhouse@mountain-home.us](mailto:lhouse@mountain-home.us) / 208-587-4716, Nancy Gurney, Consortium meeting secretary at [ngurney@haileypubliclibrary.org](mailto:ngurney@haileypubliclibrary.org) / 208-788-2036, Laurel White, Consortium ILS coordinator at [lwhite@cityofboise.org](mailto:lwhite@cityofboise.org) / 208-384-4485, or any of the member libraries.

Consortium website: <http://www.idaho-lynx.org/>

## **II. PROCESS TO JOIN THE LYNX! CONSORTIUM**

It is understood that any library interested in joining the LYNX! Consortium will probably first make informal contact with the Boise Public Library or any other member of the Consortium to gather preliminary information about becoming a part of this group. However, there is a step-by-step process that outlines the way we wish to do business with any potential member. Libraries requesting to join in the shared System must agree to obligations of membership, and must be approved by two thirds majority vote of the LYNX! Consortium library directors sharing the System.

A main requirement is that the participation of libraries shall not unreasonably interfere in the use of the System by other participants. It is agreed that the addition of branch library facility locations that are part of the library system of a current member of the LYNX! Consortium may be added to the System without such a vote, as long as the responsible current member library assumes the costs for additional licenses, accessory equipment, and system enhancements to permit the addition of each new library branch facility. Other requirements include an established funding base and an annual budget that includes LYNX! resource sharing costs and maintains a current and viable collection for its own patrons.

The following is an outline of the steps the Consortium members require from an interested library:

1. A letter of interest shall be addressed to the Directors of the current member libraries in care of the LYNX! Chair from the Director of the library seeking information and making a request for cost estimates for said library to join the LYNX! Consortium. This letter should also include a brief description of what the library intends to gain by joining the Consortium. Finally the letter should include the following statistics based on the latest report submitted to the Idaho Commission for Libraries: annual circulation, number of titles in the collection, number of holdings in the collection, number of registered borrowers and number of staff workstations that will connect to the ILS servers. This letter should be addressed and mailed to the current Chairperson of the LYNX! Consortium Directors with a copy to Boise Public Library. The Chairperson will respond with a copy of the LYNX! Standards Survey with a request to complete and return. Upon return of survey Chair will contact Systems & Outreach Services Manager of Boise Public Library.
2. The Systems & Outreach Services Manager of Boise Public Library will provide the following information to the interested library:

- a. Spread sheet with interested library's statistics inserted to determine cost share % for that library; this will include buy-in cost, maintenance, support and contingency fund shares.
- b. Copy of the *Welcome to the Wonderful World of LYNX!* document
- c. Copy of *Important Facts You Need to Know About Joining the LYNX! Consortium* guidebook

Based on the anticipated cost-share for a new member library, there will be an initial buy-in fee to the System as a payment for existing shared equipment/software. The initial basis for the buy-in fee shall be the cost of the current system configuration. This basis shall be revised as required, but no less frequently than every three years, to consider the actual costs of System elements subsequently acquired. Upon the agreement of all member libraries, the buy-in fee shall be deposited in an interest-bearing account with the City of Boise for the purposes of future expansion of the system.

3. If the applicant library can afford the cost of joining, the next step is a formal letter of intent from the Library Director and Library Board of Trustees requesting to join the LYNX! Consortium addressed to the directors of the current member libraries. This letter of intent must be received by the second quarter of any fiscal year i.e. by January of a given year.
4. The LYNX! Consortium directors will formally meet to consider the request of the interested library.
5. Upon acceptance, the interested library will enter into contract negotiations with the LYNX! Consortium and SirsiDynix, Inc.

### **III. LYNX! CONSORTIUM**

The following libraries are members of the LYNX! Consortium:

Ada Community Library  
 Boise Public Library  
 Caldwell Public Library  
 Eagle Public Library  
 Garden City Public Library  
 Hailey Public Library  
 Meridian Library District  
 Mountain Home Public Library  
 Nampa Public Library  
 Twin Falls Public Library

These ten (10) member libraries are linked together by a cooperative borrowing agreement and a contract defining related costs for the shared integrated online system.

The cooperative borrowing agreement states that patrons in good standing from any one of the participating libraries will have access to direct check out of materials at all library locations. The library borrower's cards from each agency will be honored at all agencies. The rules and regulations pertaining to borrowing at each library will apply equally to local patrons and to reciprocal borrower patrons. Materials borrowed may be returned to

any of the participating libraries. The integrated online system is managing holds across libraries for all patrons except those at Hailey, Mountain Home, and Twin Falls Public Libraries.

The contract for the shared integrated online system contains maintenance costs, hardware and software upgrades, system administration costs and the continuance of a contingency fund to support the planning and funding of shared technology. Annual check out statistics from each location along with current number of holdings and current number of staff workstations connecting to the ILS are used to determine what percentage of the annual cost will be paid by each member/agency.

The contract also outlines standards for the input and maintenance of the information stored in the bibliographic and patron databases. These standards were formulated to protect the integrity of these databases and reflect the commitment of each member to insure accurate, updated and current information is available for all users of the system. The requirements include:

- 1) to adhere to basic circulation policies,
- 2) to insure consistent information is gathered for patron records,
- 3) to provide full MARC bibliographic records for holdings unique to an individual agency's collection

These are the cornerstones for the integrity of our information. The governing body known as the Lynx! Directors is responsible for insuring that all members adhere to these standards and work to resolve any potential problems when they occur.

A copy of the current contract that is honored by all members of the LYNX! Consortium is located in *Appendix A* of this document.

#### **IV. GENERAL INFORMATION ABOUT THE HORIZON SYSTEM**

The Horizon system is a fully integrated on-line system. Access to various parts of the system is designated during the creation of user accounts.

1. **Circulation** Circulation is the workhorse of the Horizon system. Circulation automates many library functions. The two primary functions of this module are managing the circulation of library materials and keeping records of the patrons who use the library.
2. **Cataloging** Cataloging is the tool used to manage the bibliographic database. The entire system depends on the bibliographic records created and maintained in the Cataloging.
3. **Horizon Information Portal (HIP)** The Horizon Information Portal is the public access catalog your patrons will use to search for materials. They will be able to see if the item is in the library or if other libraries in the system have the item. They will also be able to place holds on materials, view their patron record, renew items currently checked out as long as there are no holds on the item, view their blocks, view their holds, and change their Personal Identification Number.

4. **Acquisitions** Acquisitions is used to order materials from vendors, receive incoming items, trace order history, pay invoices, send claims, and cancel orders. It contains your budget hierarchy and allows you to keep track of your materials budgets.
5. **Homebound** The Homebound features allow your library to extend library services to patrons who are hospitalized, ill, or otherwise unable to visit the library.
6. **Serials** The Serials module allows you to perform duties related to maintaining your serials collections, including cataloging, establishing publication patterns, checking in, circulating, and claiming serials. You can also search for serials and generate reports and statistics on serials use.
7. **PC Reliance** Also known as Off Line Circulation. This feature is available for use when the ILS is down due to power failures or upgrades.
8. **Inventory Control**
9. **Group Editor** This is a function that can be used in a variety of way to create reports on various status codes within the system. It provides a wide variety of information about areas of your collection. It is often used in collection development and for weeding purposes as well as other clean up projects.

Other SirsiDynix products include:

1. **ADA workstation**-This workstation allows vision impaired users to use the on-line catalog.
2. **Debt Collect**-This allows libraries to send long overdue accounts to a collection agency via e-mail for collection.
3. **ENS**-The Electronic Notification System makes calls to patrons for overdue items and items on hold.
4. **Kid's Catalog**-Kid's Catalog is software designed to allow you to create a simplified public access catalog for children.
5. **Receipt printers**-The Dynix system allows receipts to be printed for patrons at the time of checkout.
6. **Self Checkout**-This unit allows patrons to checkout items without going to the circulation desk as long as they have no blocks on their card.
7. **TeleCirc/TeleMessaging**-This unit allows patrons to call in and renew items they have checked out, get a list of titles they already have on loan, cancel titles they have on hold, and find out what their current fines are.
8. **Telxon units or Percon Top Gun**- These hand-held units are used for inventory purposes and for checkouts when the system is down.
9. **Laser scanners vs. Pens**-Although more expensive, laser scanners are more reliable and generally much easier to use than pens.
10. **Web Reporter**
11. **RPA-Remote Patron Authentication** – The Horizon system can be used to access subscription databases that are not currently part of the LiLI-D project. You will need to coordinate with the Systems Administrator before purchasing the subscription.

The Horizon system does not include Internet access.  
Z39.50 server software is also on the Horizon system.

## V. ADMINISTRATION OF THE LYNX! SYSTEM

There are certain functions that are done only by Boise Public Library. These include, but are not limited to:

### 1. **System administration and maintenance**

These functions include:

Weekly full **tape backup** of the operating system and all the transaction files

**DEP**-the Day End Processing program that runs each night to process daily changes in records and perform other functions such as tracking overdue items, generating notices, and deleting old statistics

There is a list of daily, weekly, monthly, semiannual, annual, and “as needed” tasks that must be performed to keep the system performing at optimum. Some of the tasks include daily statistics; daily notices; weekly programs to recount Item Groups; monthly statistics; creating a list of deleted holdings records; tracking file system usage and estimate when file systems will be full; changing login passwords and functional passwords to keep hackers and other unauthorized users from breaking into the system; validating all indexes to insure the index structure is sound; running a program that assigns item statistical classes to all holdings; insuring holdings records are assigned to the right item statistical class (ISTATs) and call number groups; annually deleting outdated or resolved blocks from the Borrower UnResolved Blocks (BURB) history file; deleting patrons who haven’t used the library for a prescribed period of time; as needed, running Authority List Report to help clean up the authority files; running report of item status that lists items that have been assigned to a specific status; running use statistics reports to determine what titles to discard from the collection; recounting patron stats and types; recounting item groups; running search statistical reports; and, the list goes on.

Additional tasks include indexing; stop word indexing; call number indexing; fiscal year rollover; MSQL; running utilities to keep the patron and holdings records accurate; dealing with error messages; and logging problems with SirsiDynix, Inc.

All problems with the Horizon system, both hardware and software, should be reported to the IT Group at Boise Public Library. If there is a hardware problem and the member library holds the maintenance contract, it is their responsibility to expedite repair or replacement. If there is a software problem, forward documented details to the Systems Administrator. If the Systems Administrator cannot solve the problem, it will then be forwarded to SirsiDynix via Log Express or by calling the SirsiDynix Customer Service Center. If problems arise involving hardware/software not related to the SirsiDynix system, the appropriate vendor will provide assistance. Each member library is responsible for paying their own telecommunication costs, local area network setup costs and maintenance, etc.

## **VI. THINGS YOU SHOULD KNOW ABOUT THE LYNX! CIRCULATION MODULE**

Currently the patron database contains patron records from all LYNX! Consortium member libraries. If you have an automated system, your patron records can be loaded into the LYNX! system. This will require preparing translation tables that will convert your patron information into the Horizon borrower record format. Since a library card from any member library is valid and can be used at all member libraries, it will be very important to watch for duplicate patron records once you are online.

We have established some standards for patron record information to ensure consistency and clarity in the patron database. An example of these standards would be our system requirement that all patron information be entered in all capital letters with no punctuation. This is based on requirements we have received from the U.S. Post Office.

There are many forms to fill out. These forms will require some careful thought and planning since this information will be used to establish your library's parameters on the system. The parameters will need to reflect your borrowing policies and privileges that you wish to enforce. As decisions are made and the forms filled out, a prospective member must also consider how their policies and procedures will blend with those of the other member libraries. This is especially important when setting priorities and limits. This is also an excellent time to revisit all your policies and procedures. If there are some changes that you would like to make, this is the perfect time.

1. **Patron/Borrower Information** – identify patron types by borrowing privileges and/or restrictions; decide what types of statistics you wish to keep on your patrons – age, gender, home library district, etc...; decide how many items can check out at one time, how many overdues will still allow checkout, fines over what amount will stop checkout; what else will limit or stop checkout and which limits will be applied to each patron type.
2. **Item Information** – identify your different loan periods; do you limit certain types of materials; determine what types of statistics you wish to keep on your collection; determine how you want to divide up your collection since one part of your collection code allows you to enter a descriptive location that will show in the public catalog; decided how extensive or brief you want your call number tables.
3. **Loan privileges and Holds** – determine which loan privileges apply/do not apply to other agencies; decide how many holds you want each patron type to be allowed to place.
4. **Library Hours** – setting up your library hours; setting holidays and other days closed.

## **VII. THINGS YOU SHOULD KNOW ABOUT THE LYNX! CATALOGING DATABASE**

The LYNX! Consortium is dedicated to maintaining the integrity of the LYNX! database. The catalogers of the Consortium meet annually to review the LYNX! Catalogers' Agreement and, by consensus, update the document which outlines the guidelines each of the individual members have agreed to follow. *In accordance with these guidelines, we require full AACR2-*

**compatible MARC bibliographic records from your library if you choose to add your records to this database.** This means that you will need to have a **knowledgeable and qualified** cataloger on staff to ensure accuracy in downloading appropriate records, entering correct data, and someone with a familiarity with MARC records and their format. Extensive searching techniques and full knowledge of AACR2 and MARC format are essential. This person will work closely with the Acquisitions and Technical Services librarians at Boise Public Library.

In order to accomplish the migration to LYNX!, the barcodes on your items will need to be 14-digit Codabar barcodes. These barcodes then will be attached individually to bibliographic records currently in the LYNX! database. **If you currently have an on-line database, we cannot accept a tape dump of this database as a means of loading your bibliographic records and items into the LYNX system because of potential differences in bibliographic records.** However, if you do not have an on-line system and you would be willing to pay OCLC or another vendor to convert your collection to a tape of full MARC records, that is acceptable. ***Extra funding will be needed to accomplish this.***

Once on-line with LYNX!, it is inevitable that you will add titles to your library which no one else in the system has. If the item you are working on is not in the system, you will need to import one from your bibliographic utility. The most common bib utility is OCLC which has two basic options: full access through OCLC Connexion and a lesser access through CATEXpress.

There are certain functions that are done only by Boise Public Library. One of these functions is the upkeep of the bibliographic database and the authority file. Database upkeep, e.g., changing MARC records already in the system, is Boise Public Library's responsibility. Authority file maintenance, i.e., changing existing authorities, is also Boise Public Library's responsibility. This keeps the authority file consistent with the Library of Congress authority file. When you are creating LYNX! records for items not in your bibliographic utility, it is imperative to review the choices in the LYNX! authority file carefully and choose an existing authority if available.

## **VIII. THINGS YOU SHOULD KNOW ABOUT THE MIGRATION**

If You Are Currently On-Line:

- All item barcodes must be 14 digit Codabar barcodes.
- All patron record ID numbers must be 14 digit Codabar.
- All information must be AACR2 compliant and in machine-readable format.

If You Are Not Currently On-Line

- All items must be physically barcoded with the 14 digit Codabar barcodes.
- Once you are on the system, you will need to attach your barcodes to records in the system.
- Once you are on the system, you will need to download records for titles not in the system.

You will be learning many new things. Your contact persons (preferably 2) with BPL and SirsiDynix must be very computer-oriented and not afraid of technology.

To establish a relationship with SirsiDynix, system training in your library should be at least 2 days long. In addition, you will need at least one orientation visit of one to one and a half days, in your library.

Boise Public Library charges for BPL staff consultations during the migration. This includes assistance with filling out Dynix forms, work on translation tables, collection codes, etc. We will make an estimate of costs which will be based on how much you spend with SirsiDynix and your consortium buy in costs up to a maximum of \$5,000.

Boise Public Library may charge for subsequent system administration if it becomes excessive.

You are migrating to LYNX! This only involves access to the on-line system. It does not involve Internet access.

We recommend some follow up training four to six months after you are on-line. This will help to fill in blanks for your staff.

## **IX. WHAT IT WILL COST**

We can give you an estimate of what it will cost for you to join the Consortium. The total cost, however, will depend on what and how much you decide to purchase beyond the very basics. We will be able to give you estimates on only part of the costs for certain items, such as for your local area network if you do not already have one installed. In this case, these costs will have to be determined by an independent contractor who will need to do the installation for you. We have included below all of the costs and items that we know about.

The total cost is made up of seven parts. These seven parts consist of: the buy in to the Consortium; the purchase of services, modules, and equipment from epixtech SirsiDynix; personnel costs for assistance from Boise Public Library (BPL staff); the wide area network; your local area network; the ongoing yearly maintenance costs; and special services. The first six parts are required elements. The seventh part depends on the individual needs of your library and staff.

### **A. *CONSORTIUM BUY-IN***

Your buy-in to the consortium and the on-line system is dependent upon your circulation for the last fiscal year and is based on the circulation you reported to the Idaho Commission for Libraries. It is also based on the total number of holdings you have in your current materials collection. Again this should be calculated the same way you determine the number of holdings you reported to the Idaho Commission for Libraries. The third factor in calculating your buy-in is the number of staff workstations that will be connecting to the ILS servers housed at Boise Public Library. These three factors are entered into a spreadsheet that adds your figures to all of the other consortium member libraries for the same fiscal year, and applied to the following formula:

**(annual circ %) + (total holdings %) + (workstations % x 2) / 4 = your cost share %**

The percentage it represents of the total is determined. That percentage is then multiplied by the original cost of the purchase of the on-line system plus subsequent additions made to the system. This amount will be paid by your library directly to a fund held by the Consortium. This money is then used later by the Consortium for future shared expenses that the members decide are needed to enhance the on-line system.

The current total cost upon which your buy in will be based is \$365,000. This is the total of the central site hardware and shared software plus additions we have made to the system. If your cost share % for the last fiscal year represented 5%, then your buy in cost would be \$18,250.00

**B. *SIRSIDYNIX COSTS***

There are certain modules and services that must be purchased directly from SirsiDynix. We will discuss with you what you will need and what you may want to purchase and put you in contact with the regional sales representative from SirsiDynix for exact pricing information.

**C. *WIDE AREA NETWORK***

It is the responsibility of the joining library to configure and maintain their wide area connection between themselves and Boise Public Library. This may require outside technical consultation.

A Cisco 184 router with a T1 card will be necessary to make the connection.

**D. *LOCAL AREA NETWORK***

It is the responsibility of the joining library to configure and maintain their own local area network with in their own library. This may require outside technical consultation.

**E. *MAINTENANCE COSTS***

There are yearly maintenance costs associated with all of the equipment and software on the on-line system. The yearly hardware and software maintenance charges are assessed in October or November of each year.

The Annual Maintenance Invoice is divided into five sections. We are charged for:

- Hardware Maintenance
- Horizon Maintenance
- Integrated Maintenance
- Peripheral Maintenance
- Subscription Maintenance

The total for this maintenance is split between all members based on their cost share %.

**G. *SUPPORT COSTS***

There is also a yearly charge for the computer system technician's salary and benefits. Currently, we charge 100% of the salary and benefits to all of the consortium members by their cost share percentages. The consortium members are looking at including more BPL staff members in this salary for system administration tasks, and currently finds the amount to be about the same as for just the technician's salary. Depending on exactly how much support activity may occur during a particular year, the LYNX! Directors unanimously agreed that the support costs could reflect up to 200% of the computer system technician's salary. An example of this was the year we migrated from Dynix to Horizon in FY 2007.

**H. *SPECIAL SERVICES***

There may be charges that you will need to incur with other companies. These could include the purchase of barcodes, the addition of your holdings into OCLC. These will have to be determined and paid for by you. However, we can assist you in deciding what will be the best way to do some of these tasks.

**X. THINGS YOU SHOULD KNOW PRIOR TO INSTALLATION**

The Horizon Migration Questionnaire, provided by SirsiDynix, is designed to help you begin the automation process. The questionnaire contains many questions to help you inform SirsiDynix of the choices you wish to make to customize the system to meet your library's needs. Completion of the questions will also prepare you for training by familiarizing you with how the system is set up. Boise Public Library will assist you in completing these questions. Some of the questions include:

1. Information to set up your Location Code and Record. This information will include your open hours and a calendar of days closed; your address; and many other setting that will be unique to your location.
2. Information about how to request the setting up of your staff access to the system. It is recommended that each staff member have their own account.
3. Borrower Loan Types: Borrower Loan Types known as BTYPES are created for each category or group of patrons. To distinguish between borrowing privileges, a library must create one patron loan type with a unique set of borrowing privileges for each category of patron. These privileges include such things as loan periods, grace periods, fine rates, and expiration dates. It serves no purpose to have numerous types with exactly the same loan periods, grace periods, fine rates, and so on. If every patron in your library has identical borrowing privileges, you only need to have one patron loan type. Borrower Loan Types already created in the system may be used.

4. Item Loan Types: Item Loan Types known as ITYPES have different circulation guidelines for the different types of materials they circulate. For example, your library may allow certain best-sellers to be checked out for a one-week period, while most other books may be checked out for a longer period of time. Other materials, such as reference works, may not be allowed to circulate at all. The Horizon system allows you to designate types of library materials and then apply distinct circulation rules to each type. A separate loan type should be created only when a different set of circulation rules needs to be defined. If even one rule is different, such as a different average replacement cost or a different processing fee, the item should be assigned to a different ITYPE. Item Loan Types already created in the system may be used.
5. Item Statistical Classes and Collection Codes: Collection codes identify the library collection that an item belongs to as well as where that collection is located. You assign a collection code to each library item as it is cataloged and entered into the system. In addition to indicating an item's location, collection codes do the following:

- Provide statistical information by collection and call number.
- Show if and how items should be indexed by call number.

You will identify the collections in your library and assign a code to each. You will also indicate the location of each collection. This location information can be displayed to patrons as they search your library's online catalog thereby enabling them to locate items in your collections. Typically a library has many collections. A collection may be composed of materials with similar literary writing styles, subjects, or media formats. A collection can also contain similar reading interest levels or circulation rules. These collections are easily identified because they are usually housed together and have uniform call numbers. Identifying major collections is usually quite easy. After a thorough review, you may also discover minor collections that you didn't think of originally.

6. Call Number Groups: In addition to generating statistics for ISTATS, you can also generate statistics for subgroups within collections. These subgroups are divided into statistical groups by call number. There are three steps to dividing collections for subgroup statistics:

- Determining the classification scheme
- Assigning call number tables
- Assigning call number groups

Dividing collections into call number groups can result in useful circulation statistics. When you divide your collections into call number groups, the system not only generates circulation statistics for the collection as a whole (under ISTAT to which it is assigned), but also includes statistics on call number groups within the collection. Before you can break a collection down into call number groups, you must first identify the collection's classification scheme. A classification scheme is the method the library uses to classify its items. There are two basic kinds of classification schemes. Only standard

classification schemes (i.e. Dewey Decimal and Library of Congress) can be broken down into call number groups. (See Sample 6.5 a & b).

7. Borrower Statistical Classes: Patron statistical classes (BSTATs) are the different categories you divide your patrons into to count the different types of people who use your library. There are two main functions for patron statistical classes:

Increase your understanding of patron demographics  
Provide necessary data for management reports

There is no limit to the number and types of BSTATs you can create for your library. However, you must have the necessary information available for entry on the patron records. If you do not currently have BSTAT data for your patrons you will need to gather it. This may involve creating a new registration form for patrons to fill out to collect the additional information. When you register patrons on the system, you can assign them to various BSTATs. The system then tracks the number of items checked out by patrons with each BSTAT. Begin by listing general categories of BSTATs you might use. Here are some examples:

Age  
Gender  
Demographics  
Language of Ethnicity

8. Loan and Hold Parameters: The Horizon system allows you to restrict who can borrow items or place them on hold. You can set up parameters to customize each agency's circulation rules with respect to its own patrons and with respect to patrons from other agencies.
9. There are a series of questions that allow you set up additional circulation parameters and circulation privileges based on a series of variations to include either location, borrower or item type and are unique to your library.
10. Finally you will be asked about Circulation Notices, Circulation Receipts, Cataloging Spin labels and sample patron registration form used by your library

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## AGREEMENT TO OBLIGATIONS OF LYNX! MEMBERSHIP

LYNX!, a library consortium including public libraries from the Treasure and Magic Valleys (southwest Idaho), brought up its first automated online catalog and circulation system in 1996 with four member libraries participating. It has since grown to ten libraries with fifteen locations. Membership in the LYNX! Consortium provides a number of benefits for a library and its users.

- Access to over 1.1 million items in LYNX! through reciprocal borrowing
- An automated, integrated circulation, cataloging, and acquisition system
- Optional courier service which delivers items directly to your library, usually within 48 hrs
- Server maintenance and system expertise
- Membership in an organization with a goal of sharing not just materials, but support and expertise as well. LYNX! users group meetings to encourage discussions; readily available network of uniquely talented library staff to assist in all areas of library service
- Group purchasing discounts on library materials (between 25-40%)
- Group purchasing discounts on databases (Learning Express, RefUSA, TumbleBooks)
- Coordination of youth summer reading services

In order to become a member of the LYNX! Consortium, a library must agree to fulfill the following qualifying standards of membership:

- Be a Public Library as defined by Idaho Code, Title 33 (Sections 2601-2611; 2701-2729)
- Have a current strategic plan (three-to-five year) adopted by your governing board
- Have a full time Library Director
- Have a staff member dedicated to Circulation functions
- Have a qualified Cataloger and meet the Cataloging agreement obligations
- Meet 70% of other consortium standards as identified in the LYNX! Consortium survey

Other obligations are as follows:

- Know and adhere to LYNX! policies and procedures
- Maintain a current and viable collection for its own patrons
- Loan and borrow materials with other LYNX! libraries (all materials with the exception of those designated as non-circulating)
- Pay LYNX! bills promptly and completely
- Ensure that bibliographic records meet LYNX! cataloging standards by either
  - Hiring staff already trained in AACR2 and MARC cataloging
  - Providing training for staff and specifications on how training will occur
- Arrange for funds for either postal transfer of materials or courier service to and from your library(ies) should you choose to participate in the Treasure Valley courier.
- Provide for and maintain all hardware, software, and Internet connection necessary to ILS
- Hire and/or train staff with general information technology skills
- Commit to and cover costs of sending a representative to various consortium meetings

I, \_\_\_\_\_, an official representative of \_\_\_\_\_

have read LYNX! consortium agreement and the above obligations. I hereby agree to adhere to the obligations set forth for LYNX! membership\*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**\*This document does not stand in place of official consent to participate via LYNX! Consortium Agreement**

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## **Agreement for LYNX! Consortium Services**

This agreement is made this 1st day of October, 2005, by and between the ADA COUNTY FREE LIBRARY DISTRICT (d.b.a. ADA COMMUNITY LIBRARY), 10664 W. Victory, Boise, ID 83709 (hereinafter referred to as "ADA"), the BOISE PUBLIC LIBRARY, 715 S. Capitol Boulevard, Boise, ID 83702 (hereinafter referred to as "BOISE"); the CALDWELL PUBLIC LIBRARY, 1010 Dearborn, Caldwell, ID 83605 (hereinafter referred to as "CALDWELL"); the EAGLE PUBLIC LIBRARY, 100 N. Stierman, Eagle, ID 83616 (hereinafter referred to as "EAGLE"); GARDEN CITY LIBRARY, 6015 Glenwood, Garden City, ID 83714 (hereinafter referred to as "GARDEN CITY"); HAILEY PUBLIC LIBRARY, 7 West Croy, Hailey, ID 83333 (hereinafter referred to as "HAILEY"); the MERIDIAN FREE LIBRARY DISTRICT, 1326 W. Cherry Lane, Meridian, ID 83642 (hereinafter referred to as "MERIDIAN"); NAMPA PUBLIC LIBRARY, 101 11th Avenue South, Nampa, ID 83651 (hereinafter referred to as "NAMPA"); and the TWIN FALLS PUBLIC LIBRARY, 201 Fourth Ave East, Twin Falls, ID 83301 (hereinafter referred to as "TWIN FALLS"), and MOUNTAIN HOME PUBLIC LIBRARY, 790 N. Tenth E., Mountain Home, ID 83647 (hereinafter referred to as "MOUNTAIN HOME"), joining this agreement in 2007; and supersedes all previous agreements for automated circulation, integrated on-line services, Internet services, courier services, reciprocal borrowing, and open access.

WHEREAS all parties listed above wish to increase efficiency, convenience and relevance of library services; increase access to library materials; improve access to technology; ensure greater accuracy in an online database; improve services to under-served populations; coordinate specialized collections; and

WHEREAS all parties listed above wish to continue as members of a consortium for the provision of improved library services to the patrons of their own service areas and the wider service area covered by consortium members, said consortium to be known as LYNX!; and

WHEREAS all parties listed above wish to provide for choice in levels of membership in LYNX! and in the consortium services selected by current and future individual institutional members, this agreement includes sections defining the requirements imposed by the LYNX! Consortium for the provision of integrated on-line system services, courier services, open access services, and other resource sharing opportunities;

NOW THEREFORE, the parties hereby agree as follows:

### **Section I. LYNX!**

#### **Membership**

Full voting membership in the LYNX! Consortium is restricted to those libraries that participate in the shared use of the Integrated Library System (ILS), that adhere to the data entry and cataloging protocols agreed upon by the members, and that pay their formula-based annual cost for sharing the ILS system and contribute to the joint fund for upgrading the system. Those member libraries

not participating in the ILS sharing aspect of the LYNX! Consortium but who participate in open access, courier service, or other service have a vote on matters related to the specific services they choose and no others.

LYNX! may form any committees and/or task forces that it deems necessary to its operation, and dissolve any subgroups that it deems no longer necessary. All subgroups are advisory to the Directors. Recommendations or decisions of subgroups must be ratified by the Directors in order to take effect.

LYNX! Directors will meet not less than quarterly at a time and place set by the Directors. Each Library Director or designated staff member will be present at these meetings. Duties of Chair and Secretary will rotate among members. Non-directors may attend on occasion to present reports from specialized areas. Non-directors are expected to leave following their reports.

### **Internet**

ILS sharing member libraries must arrange for Internet access separately, as deemed to be most advantageous to the specific library.

### **Participation in Services**

Libraries may choose to participate in the open access services, courier services, and any additional services or joint buying efforts in addition to ILS use, or may participate in those services alone, for cost-sharing fees by formula for each separate service or at no cost-sharing fee when provision of equivalent services is considered sufficient, as determined by the LYNX! Consortium members using each particular service.

### **Services**

1. Each agency is responsible for maintaining a current and viable collection of materials for its own patrons.
2. The Libraries agree to provide lending services to the patrons of each Library, as if the patron requesting lending services in a Library were a resident of the jurisdiction in which the patron is seeking lending services.
3. For the purposes of this Agreement, lending services shall mean direct lending to a patron in person, lending to a patron conveyed by courier service, or other means of providing lending service to a patron such as Interlibrary Loan. Until this Agreement is amended, this Agreement covers no other services.
4. Nothing in this Agreement shall require a Library to extend services to a non-resident patron beyond the kind, number, value, or quality of services provided to resident patrons.

5. The non-resident patron must have a valid borrower's card from his/her home library and be in good standing. The lending library may elect at its discretion to verify patron status and to deny service to patrons whose status does not correspond to the requirements of the lending Library.
6. Existing agreements between member libraries to issue library cards to each other's residents will be honored by those libraries.
7. All Libraries agree to provide electronic access to patron records to the other Libraries, where technically feasible, for the purpose of verifying patron status. Libraries may elect to verify patron status using other means, at their discretion.
8. LYNX! members may, from time to time, choose to undertake projects other than the shared ILS. Such projects may include, but are not limited to, system-wide collection development activities, the creation of additional shared collections-electronic or otherwise, staff training or workshops on topics of common interest, or services and research and development projects concerning technologies or other matters of interest to the library community. Participating member institutions will share in any costs involved with such projects.

## **Compensation**

1. When any Library provides more than 10 percent of its total lending to the patrons of another single Library's jurisdiction representing a period of a full fiscal year, that lending Library is entitled to compensation for the period for which the lending imbalance was reported under this agreement. The amount of compensation is to be negotiated with the Library jurisdiction representing the borrowing patrons in excess of 10% of its total lending. Negotiations should take place no later than June 30 of each year.
2. The bilateral compensation agreement requires only the signature and approval of the governing bodies of the two Libraries involved in the compensation arrangement and shall identify and set forth the issue or issues involved in the compensation as well as the amounts, types, and dates of compensation. Nothing in a compensation agreement shall modify this Agreement.
3. A Library seeking compensation may elect, at its discretion, in-kind compensation in lieu of cash.

## **Withdrawal**

1. Any Library can withdraw from the consortium with 90 days of notification to the Consortium Chair who will in turn notify other members. Such withdrawal shall be valid on the 30th of September of any year in which the Agreement is in force. No refund of contributions shall be made to a Library withdrawing from the Agreement except for contingency fund contributions made after those used on most recent upgrades.

2. If a withdrawing Library is party to a bilateral compensation agreement, the bilateral agreement is no longer covered by this Agreement.

## **Section II. Integrated Library System (ILS)**

WHEREAS all of the parties desire that they share in the use of an Integrated Library System (hereinafter referred to as System) in order to provide integrated on-line services at Ada, Boise, Caldwell, Eagle, Garden City, Hailey, Meridian, Mountain Home, Nampa, and Twin Falls and

WHEREAS, all of the parties desire to share in the cost of providing automation system activities at Ada, Boise, Caldwell, Eagle, Garden City, Hailey, Meridian, Mountain Home, Nampa, and Twin Falls according to the terms and conditions of this Agreement;

NOW THEREFORE, the parties hereby agree as follows:

### **Hardware**

All participants agree to acquire any necessary and desired access stations including workstations and PCs and all communications and related equipment such as routers and firewalls to be installed at their respective sites, and communications and related equipment and software to be attached and incorporated into the System, currently hosted by Boise, and to procure and to arrange for the installation of any communication lines connecting the access stations to the System all at the expense of each party. Boise Public Library Information Technology staff, as current host, will manage all connections to Boise Public Library for System access. Wide Area Network (WAN) management will be the responsibility of Boise Public Library Information Technology staff based on agreed upon points of demarcation for connections, as agreed with each member library. The access stations at each site referred to herein shall be the sole property of the individual participants who purchased said equipment.

### **Operation of the System**

1. The System shall be available 24 hours a day, seven days a week, except for normal maintenance, or in the event of a system failure. The hours of operation of the central computer equipment and availability of the central computer equipment to the participating libraries will not be decreased below the number of hours existing at the execution of this contract unless agreed upon by all parties. All maintenance, upgrading of software, etc., will be scheduled in advance when possible, with notification to all member libraries no less than 24 hours in advance of the System being made unavailable.
2. System host, currently Boise, shall provide at no cost to all participants reasonable explanations of the conventions and procedures established and utilized in the operation of the System, provided, however, that any direct costs incurred in training System personnel for subsequent software releases shall be borne on a *pro rata* basis.

"System personnel" shall be understood to mean only the person(s) whose salary and fringe benefit costs are shared by all participants. Under normal circumstances, the cost incurred in training only one (1) member of the System staff in System operations and software shall be shared by all participants; in the event that it is deemed necessary to send more than one person to the training, System host shall be entitled to negotiate with other participants prior to the training, regarding the sharing of training costs for the additional person(s). System host agrees to provide a training session for all other participants following any training attended by System personnel within thirty (30) days of the vendor's course.

## **Maintenance**

1. Each participant shall be responsible for any and all maintenance agreements it has in regard to access stations and site-specific equipment. Each library shall have such agreements on all equipment whose failure might adversely affect the operation of any part of the rest of the System.
2. It is recommended that maintenance agreements be in place for all communications equipment and major connecting equipment used for accessing the System.
3. System host will continue to maintain in effect the System vendor maintenance agreement relating to the System, and shall negotiate where possible discounts that will be passed on to all members for such things as prepayment of maintenance fees. All parties are responsible for paying their share of System related costs for central equipment according to the pro rata formula outlined in Section II (F-5).

## **Access to Data**

1. All participants agree that full and free access shall be allowed to the information stored in the System relating to the bibliographic descriptions of library materials at each participating library and relating to the holdings, availability and circulation status of such library materials.
2. Each participant agrees to maintain the confidentiality of the information stored in the System relating to patrons of each library.
3. System host shall allow each participant access to other machine readable information stored in the System relating to the patrons, titles, holdings, and circulation status of each respective participant and facilities to extract and/or copy said information in machine readable or other form at the sole expense of each member.

## **Supplies**

Each participant shall purchase, at its sole expense, the encoded labels utilized in the identification of patrons and library materials at each library.

## Costs

1. All participants shall share the cost of the Computer Systems Technician salary and fringe benefits on a *pro rata* basis by formula approved by the LYNX! Consortium library directors sharing the System. Costs encompass other staff assistance from the Information Technology Group regarding Wide Area Network issues, troubleshooting, on-site visits, etc., from Circulation staff regarding circulation issues, and from Cataloging staff regarding data base entry and authority control work.
2. All participants shall share in the costs of System maintenance, support costs, reserve or contingency fund for replacement of any part of the System that affects the entire membership on a *pro rata* basis by formula approved by the LYNX! Consortium library directors sharing the System.
3. On a regular basis, but no less frequently than every two (2) years, the holdings database shall be corrected regarding Authority Control. All participants, based on each participant's share of the total holdings, shall share in the cost of the corrections.
4. In the event that further expansion of the capacity of the System shall be required, or a new System purchased, all participants shall share in the cost of such expansion on the *pro rata* basis by formula approved by the LYNX! Consortium library directors sharing the System.
5. As used herein, "*pro rata* basis" shall be understood to mean each participating library's respective cost-share using a formula approved by the LYNX! Consortium library directors. The formula is currently based on each member's annual circulation, number of holdings and number of workstations. Circulation is used to determine activity, holdings to determine space within database and stations address licensing.

|      |  |
|------|--|
| 25%  | # Circulation as a percentage of Consortium total  |
| 25%  | # Holdings as a percentage of Consortium total     |
| 50%  | # Workstations as a percentage of Consortium total |
| 100% | Total cost share percentage                        |

The aforementioned costs based on the cost share formula will be reviewed annually in March of each year through consensus of the LYNX! Consortium directors, so that estimated costs can be adequately budgeted for by each participant in the October 1 - September 30 budget year and to ensure equitable cost sharing among all participants.

6. Nothing in this Agreement shall prevent the System host from utilizing any additions or improvements to the System which enhance the System's capabilities. Other participants shall not be required to contribute to any further expansion of system capabilities except as may be agreed upon by all participants in the future. Should any other member library wish to take advantage of these System

improvements, it shall reimburse the System host for its *pro rata* share of the original cost of the improvement, if appropriate, or purchase the application directly from the vendor.

7. Each participant shall be responsible for the costs of electrical power, heat, light, ventilation, air conditioning, or other environmental controls at its premises, as well as for the costs of establishing, operating, and maintaining their Local Area Network (LAN). System personnel from the System host will be available for telephone consultation and trouble shooting in the event of LAN or Wide Area Network (WAN) problems at other library sites.

8. System host shall submit invoices for salary and fringe benefits of System personnel, supplies, central System maintenance costs, annual contingency fee, and other agreed upon costs on a quarterly basis. Said invoices shall be submitted in the months of December, March, June, and September. Invoices are due and payable within thirty (30) days of receipt.

9. At the termination of this Agreement as hereinafter provided, all improvements made of any sort to the System shall be the sole property of System host, currently Boise. The withdrawing party shall receive no refunds of any monies paid for participating in the System except for contingency fund contributions made after those used on most recent upgrades.

### **Additional Libraries**

1. Additional libraries may request to join in the shared System through a letter of intent and agreement to obligations of membership, and must be approved by majority vote of the LYNX! Consortium library directors sharing the System. The first requirement is that the participation of such libraries shall not unreasonably interfere in the use of the System by other participants as contemplated by this Agreement. It is agreed that the addition of branch library facility locations that are part of the library system of a current member of the LYNX! Consortium may be added to the System without such a vote, as long as the responsible current member library assumes the costs for additional licenses, accessory equipment, and system enhancements to permit the addition of each new library branch facility. Other requirements include an established funding base and an annual budget that includes LYNX! resource sharing costs and maintains a current and viable collection for its own patrons.

2. Based on the anticipated cost-share by approved formula for a new member library, there will be an initial buy-in fee to the System as a payment for existing shared equipment/software. The initial basis for the buy-in fee shall be the cost of the current system configuration. This basis shall be revised as required, but no less frequently than every three years, to consider the actual costs of System elements subsequently acquired. Upon the agreement of all member libraries, the buy-in fee shall be deposited in an interest-bearing account with the City of Boise for the purposes of future expansion of the system.

3. Should the new member library account for a higher cost-share percentage by formula than anticipated, an additional buy-in charge may be levied against that member in the succeeding budget year.

4. In the event that the System is expanded with the addition of a new library or library district, each member will receive a pro rata reduction in the costs of its participation in the System based on the cost-share percentage by formula attributed to the new library or library district.

### **Limitation of Liability**

Each party shall use its best efforts to maintain the integrity of said files, and use the appropriate fields for System information as designated by the vendor. The parties shall have no responsibility or liability to the other for the reliability or performance of the System or the access stations or communications lines procured by Ada, Caldwell, Eagle, Garden City, Hailey, Meridian, Mountain Home, Nampa, and Twin Falls except that which is in accordance with Section 2 (F-1).

### **Cooperative Borrowing**

Definition: "Cooperative borrowing," for the purpose of this agreement means that patrons in good standing from any one of the participating libraries will have free access to direct check out of materials at all participating library locations. All patron cards from participating libraries will be honored equally by other libraries. Each library's rules and procedures will have authority over its own items.

### **Cooperative Cataloging**

Definition: "Cooperative cataloging," for the purpose of this agreement, means that all LYNX! members know that the LYNX! bibliographic database is shared by all members. Each library's rules and procedures will have authority over its own holdings which are attached to the bibliographic records. All members who use the Cataloging module will have a working knowledge of cataloging records (MARC) to minimize errors. All members who input short records will have a working knowledge of AACR2.

1. In a reliable and cooperative manner, all LYNX! members who use the cataloging module agree and acknowledge that:
  - a. everyone's main focus is the ease of the patron whenever possible;
  - b. everyone will follow established cataloging rules as put forth in AACR2;
  - c. everyone will follow established written procedures;
  - d. Boise Public Library has primary responsibility for the upkeep and management of the database;

e. there are different levels of cataloging knowledge and expertise represented throughout the consortium;

f. everyone will maintain open communications with each other as well as collaborative support and assistance when needed to ensure the best possible public service for all concerned.

### Section III. General Provisions

#### **A. Term**

1. The term of this Agreement is three years and may be extended for an additional three years by simple majority vote of participating Libraries.
2. The initial term of this Agreement shall commence as of the date first above written and shall terminate on September 30, 2008. The agreement shall automatically continue for consecutive three-year renewal terms unless terminated by any party as of the end of the initial term or any renewal term upon ninety (90) days written notice to the other parties. This agreement shall remain in full force and effect for all other signatories.
3. Should any political Jurisdiction which funds a participating Library reduce or cease funding a Library during the Term of Agreement, that library may elect not to participate during the period of reduced or eliminated funding, and may re-activate its participation with no penalty when funding is restored. Nothing in this Agreement shall require the continuation of the Agreement beyond legally required time or funding limits.

#### **B. Amendment**

This Agreement may be amended at any time during the initial term or any renewal term hereof by a written agreement between the parties duly executed by each of them.

#### **C. Authorization**

The persons executing this Agreement on behalf of Ada, Boise, Caldwell, Eagle, Garden City, Hailey, Meridian, Mountain Home, Nampa, and Twin Falls each hereby represents that he is duly authorized by the governing body of the entity represented by him to execute this Agreement on behalf of said entity, and that, upon his execution hereof, this Agreement shall be a valid and binding Agreement of the entity represented by him.

#### **D. Governing Law**

This Agreement shall be construed and the rights of the parties governed by the laws of the State of Idaho.

## **E. Notices**

Any notice or other writing required or permitted by this Agreement to be delivered to any party may be delivered personally to an authorized representative or may be delivered by mailing such notices or writing c/o Library Director at the addresses listed on page 1 of this Agreement.

## **F. Severability**

If any portion of this Agreement is found illegal or unenforceable, other provisions of the Agreement remain valid and in force.

## **Section IV. TREASURE VALLEY COURIER SERVICE**

Member Libraries may choose to participate in existing courier service and must indicate participation via authorization on Agreement signature page.

### **A. Purpose**

Participating libraries intend to reduce the delivery time for materials returned to libraries other than the owning library and delivery of holds to waiting patrons, establishing regularity to the delivery schedule so patrons will have materials when they need them and when promised. Participants in the courier service will seek to share the most cost-effective and best quality delivery service possible, both within the consortium and within the state.

### **B. Establishment of Delivery Schedule**

Courier deliveries will originate from the Library in custody of the van, currently Boise, on a six-day per week schedule, such schedule to be determined by the member libraries consistent with use and available funds. Courier will also stop at central offices of local school districts to pick up public library materials which have been returned to the schools on an as-needed basis. It is agreed that the delivery schedule may be adjusted as necessary, and that schedule changes may affect the allocation of costs.

### **C. Ownership of Van**

Boise Public Library, having provided matching funds from local tax monies for the current vehicle, maintains ownership of the current vehicle purchased for use in the courier delivery service for the duration of its serviceable life. The current vehicle shall remain with Boise Public Library if and when the cooperating libraries withdraw from this agreement or dissolve it by mutual consent.

#### **D. Replacement of Van**

As needed, courier service participants will be assessed a cost-share for van acquisition on the same formula as for the courier service as a whole. A contingency fund exists, held at the Meridian Library District, that belongs to Ada, Boise, Caldwell, Eagle, Garden City, Meridian and Nampa that could be used as partial payment for a replacement van. When a decision is made to purchase a new van, primary ownership and custody will be reviewed and may be re-assigned.

#### **E. Status of Employee**

The employee assigned to the courier position will be an employee of the library designated to be responsible for van and consortium courier services, hired under the policies and procedures of that library. All personnel policies and other city or district library policies regulating employee salary, rights, and benefits apply.

#### **F. Cost Share Method**

Actual operating costs are allocated by a formula which takes into account the frequency of the delivery service received by each library, the quantity of materials returned to each library from other locations, and mileage that must be traveled by the courier in order to provide the service to each library. This formula is re-evaluated annually by the directors.

#### **G. Statistical Information**

Statistics reflecting the quantity of materials picked up from, and delivered to, each library are kept by the System. This information is accessible to all members through the System.

#### **H. Withdrawal**

As with the System agreement, a library may elect not to participate in courier service during the period of reduced or eliminated funding with appropriate notice, and may re-activate its participation with no penalty when funding is restored.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first above written...

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# LYNX! Consortium Cataloging Agreement

2/01

6/05 rev

2/07 rev

7/08 rev

In a reliable and co-operative manner, all LYNX! Members who use the Cataloging module agree and acknowledge that: everyone's main focus is the ease of the patron whenever possible ; everyone knows what AACR2 and LCRI practices are ; everyone will follow established cataloging rules as put forth in AACR2 and LCRI ; any person inputting bibliographic records into the system will have a working knowledge of cataloging ; Boise Public Library has primary responsibility for the upkeep and management of the database ; there are different levels of cataloging knowledge and expertise represented throughout the Consortium ; and everyone will maintain open communications with each other as well as collaborate support and assistance when needed to ensure the best possible public service for all concerned.

## Co-operative cataloging

1. **Definition** "Co-operative cataloging," for the purpose of this agreement, means that all LYNX! Members know that the LYNX! Bibliographic database is shared by all members. Each library's rules and procedures will have authority over its own holdings which are attached to the bibliographic records. All members who use the Cataloging module will have a working knowledge of cataloging records, AACR2 and LCRI practices to minimize errors.
2. **Bibliographic records** The participating libraries agree that the main body of bibliographic records, because they are shared by all members, should remain intact. Participating libraries are permitted to: enter and change indicators and/or matchpoints (OCLC numbers, ISBNs, LCCNs), add a Library of Congress-authorized heading. All other changes should be referred to Boise Public Library. However, if a library downloads a record or duplicates a record already in Horizon, they may change the record in accordance with AACR2 and LCRI practices if they are the only holding attached. When attaching holdings to these MARC records, all members realize that these records could be overlaid or merged with a MARC record downloaded from an appropriate cataloging source. Members who do not have a working knowledge of cataloging should not alter MARC records in Horizon.
3. **Entering MARC records** If a MARC record is unavailable from an appropriate downloading source, members may input MARC records in accordance with AACR2 and LCRI practices, complete with appropriate fields, tags, indicators, and subfields. Authorities added must be Library of Congress-authorized. When attaching holdings to these MARC records, all members realize that these records could be overlaid or merged with a MARC record downloaded from an appropriate cataloging source. Members who do not have a working knowledge of cataloging should not input MARC records into Horizon.
4. **Inputting of authorities (author, series, subject)** All authorities added to bibliographic records must be Library of Congress-authorized.  
Authors: Obviously, not all authors are LC-authorized. If there is no authority in LC, you may create an authority according to AACR2 standards and LCRI practices.

Series: LC no longer authorizes series statements but still retains the ones it has formulated. If there is no authorized statement, input a 440 field.

Subject: All subject authorities must be LC-authorized. Sears headings and the like (including those made-up) are not permitted. In addition, everyone is aware that OCLC is not monitored and contains hundreds of incorrect, unauthorized subject headings.

5. **Merging records** The participating libraries (except BPL) will merge only their own records into another record. If libraries notice other possible merges, they will contact Boise Public Library, who will determine whether a merge is necessary or not.
6. **Paperbacks, board books, and Book Club editions** Each participating library has complete control over whether to place one of the above, defined not by the physical description of the book by its placement within the library, on a hardback record or on its own record.
7. **Serial records** All participating libraries agree to place their holdings for a serial monograph on a serial record already in the system. If there is not a serial record in the system, one should be downloaded if available or, if not, the book may be attached to its own record. A serial monograph is defined as a title that is issued periodically in book form that may also be cataloged as a book. Examples include travel books (Fodor's, Lonely Planet, Frommer's, Rough Guides, etc.) Guinness Book of World Records, codes, annual reports, educational testing/self-help (Barron's, Peterson's, Arco's), law self-help (Nolo's.) A serial record is distinguished from another record by the fact that the 300, 310, and/or 362 fields are different. Regular monograph records do not have a 310 or 362 fields and the 300 field in the serial record will usually show "v. :" (volume information) in the first subfield instead of page numbers.

In Acquisitions, an item cannot be attached to a serial record and is ordered by the ISBN. When the item is being entered, these individual records should be merged into an existing serial record or one that has been downloaded.

Reviewed and updated 7/08

Terri Wear Ada Community Library  
Gina Gartman Ada Community Library  
Laura McNew Ada Community Library  
Luan Knospe-Martin Boise Public Library  
Shanna Decker Boise Public Library  
Elaine Leppert Caldwell Public Library  
Megan Blackwell Eagle Public Library  
Gwen Dahlberg Garden City Public Library  
Lisa Zeiter Garden City Public Library  
Randi Wilson Hailey Public Library  
Sandy Loeppke Meridian Library District  
Luise House Mountain Home Public Library  
Beth Neunaber Hoback Nampa Public Library  
Marenda Wright Twin Falls Public Library  
Kathleen Lambert Twin Falls Public Library

## **LYNX! Consortium Circulation Agreement**

Submitted by the Circulation Committee (formed July 1999) to the Directors, March 2000

In a reliable and co-operative manner, Circulation staff and designated volunteers of all LYNX! Consortium libraries will provide clear and consistent service and information to all patrons; will follow established guidelines; and will maintain open communications with each other as well as collaborative support and assistance when needed to insure the best possible public service for all concerned.

### Co-operative Borrowing

A. Definition "Co-operative borrowing", for the purpose of this agreement, means that patrons from any one of the participating libraries will have free access to direct checkout of materials at all participating library locations. All patron cards from participating libraries will be honored equally by other libraries. Each library's rules and procedures will have authority over its own items. Patrons of all libraries served by the courier may place holds on items at other libraries which will be sent by courier to the patron's library of choice. Any materials on which system holds are not allowed may be requested from the owning library by library personnel for any patron in good standing. All items will have a seven (7) day hold period.

B. Return and Check in of Materials Materials borrowed may be returned to any of the participating libraries. Personnel of participating libraries will checkin in and promptly return materials belonging to other participating libraries using the most expedient method available. Expedient in this context means return within seven days. Personnel of participating libraries will not check in damaged items. The owning library will determine appropriate charges and will notify the patron of the amount owed. The participating libraries will review their respective lists of transits and will distribute such lists to all appropriate libraries for search. Any library receiving notification of a "lost in transit" will respond promptly to the owning library.

C. Overdue/Lost Items Any "Final Notices" applicable to borrowed items will be photocopied and sent to the owning library. All libraries will assist the owning library in any way possible in order to achieve the return of the overdue materials.

D. Renewals A library may renew an item belonging to another library as long as the item is not on hold or has exceeded the maximum renewals assigned by the item.

E. Fines and Other Charges Overdue fines of any amount (unless the account is in collections) may be collected and kept at any library. Charges of any amount for damages already assessed may be collected and kept at any library. Replacement charges and collection agency accounts may be collected by any library, but will be sent to the owning library. Maximum fines for checkout will be \$10.00, although a lesser amount may be collected. A one time override will be allowed and a block ("must pay fines next time") set on the record. All fines must be paid in full at the time of renewal or yearly address check.

F. Patron Records Each participating library has complete control over the information attached to its patrons' records. One person in Circulation at each library will have access to the patron records of all other libraries to view the records, however, no changes or additions will be allowed except by personnel at the patron's home library. Cards must be renewed at the home agency unless a secondary agreement has been made between two or more libraries to allow cross renewals. All participating libraries will enter patron information in a standard format which will be agreed to by a

committee of circulation staff represented by all libraries. (See attached copy of standard adult and juvenile records).

Committee members:

Jana Brickey, NPL

Laurel White, BPL

Ivy De Hart, EPL

Nancy Woodward, GCPL

Janice Denny, CPL

Kim Youmans, BPL

Torra Fort, BPL

Gayla Pace, MLD

Vicki Rae, ACL

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## **LYNX! CONSORTIUM MEMBERSHIP STANDARDS**

All prospective members of the LYNX! Consortium must meet the five qualifying standards marked by asterisks (\*) and about 70% of the remaining standards outlined below. See also “LYNX! Consortium Prospective Member Survey.”

### **I. ACCESS**

#### **A. Non-duplicated hours**

The number of non-duplicated hours for each member library facility(ies) should be a minimum of 48 hours.

#### **B. Evening hours**

Each member library should have regular open evening hours.

#### **C. Weekend hours**

Each member library should have regular open weekend hours.

### **II. ADMINISTRATION**

#### **A. Idaho Statute/Code\***

A qualifying institution must be a public library as defined by Idaho Code, Title 33, Section 2601-2611 or Section 2701-2729.

#### **B. Strategic Plan\***

A qualifying library must have a two- to six- year strategic plan adopted by its governing Board.

#### **C. Technology Plan**

Each member library should have a technology component to its strategic plan or a separate technology plan adopted by its governing Board.

### **III. COLLECTIONS**

#### **A. Materials**

Each member library should spend a minimum of \$3.00 per/capita population on materials (books, AV, periodicals and databases) or 10% of its operating budget.

### **IV. FACILITIES**

#### **A. Square Footage**

The minimum size for a permanent LYNX! Consortium library structure should be 10,000 square feet of space dedicated exclusively to library purposes.

#### **B. Distance**

A new member library should be within 50 miles of the nearest LYNX!  
Consortium library.

V. SERVICES

A. Value-added Programming

Each member library should offer weekly value-added programs to youth patrons.

VI. STAFFING

A. Library Director\*

A qualifying library must have a full-time (40-hr.) library director, who may be responsible for no more than two day-to-day operations.

B. Circulation Manager\*

A qualifying library must have a staff member dedicated to overseeing circulation functions.

C. Full-time Staff

Each member library should have .5 FTE staff per 1,000 population.

D. MLS Degrees

Each member library should have at least one staff member who has obtained an MLS degree.

E. Reference and Readers' Advisory Staff

Each member library should have designated and trained reference and readers' advisory staff.

F. Cataloging\*

1. A qualifying library must have a knowledgeable and qualified cataloger on staff to ensure accuracy in downloading AACR2-compatible MARC bibliographic records.

G. Youth Services Staffing

Each member library should have designated and trained youth services staff serving pre-school through high school aged patrons.

H. IT Staff

Each member library should have designated IT staff or regular access to outside IT expertise.

**Unanimously adopted**  
by LYNX! Directors,  
Boise, Idaho,  
17 October 2008

**LYNX! CONSORTIUM**  
**PROSPECTIVE MEMBER SURVEY**

Membership in the LYNX! Consortium brings both advantages and obligations to participating institutions. In order to ensure that prospective new members are capable of meeting their new service and access obligations, the Consortium has adopted standards by which applying libraries will be evaluated. This survey helps LYNX! Directors to determine a library's readiness to assume consortium membership.

**Qualifying Standards:**

- I. Is your institution a Public Library as defined by Idaho Code, Title 33, (Section 2601-2611 or Section 2701-2729)?  Yes  No
- II. Does your library have a current strategic plan (three-to-five year) adopted by your governing Board?  Yes  No
- III. Does your library have a full-time (40-hr.) library director whose responsibilities do not exceed more than two day-to-day operations?  Yes  No
- IV. Does your library have a staff member dedicated to overseeing circulation functions?  Yes  No
- V. Does your library have a knowledgeable and qualified cataloger on staff to ensure accuracy in downloading AACR2-compatible MARC bibliographic records?  Yes  No

If the answer to any of these five qualifying questions is "no," your library's deficiencies will first have to be addressed before membership to the Consortium can be further considered. If all of the above answers are "yes," please complete the remainder of the questionnaire.

**Consortium Standards:**

Access:

- 1) How many non-duplicated hours per week is your facility(ies) open?  hours  
[Consortium standard is 48 hours per week]
- 2) Is your library regularly open any evening hours?  Yes  No  
[Consortium standard is Yes]
- 3) Is your library regularly open any weekend hours?  Yes  No  
[Consortium standard is Yes]

Administration:

- 4) Does your library have a current technology plan adopted by your governing Board?  
 Yes  No [Consortium standard is Yes]

5) Does your library have a current collection development policy adopted by your governing Board?  Yes  No [Consortium standard is Yes]

Collections:

6a) How much does your library spend per capita on materials (books, AV, periodicals, and databases)? \$\_\_\_\_\_ [Consortium standard is \$3.00]

6b) What percent of your operating budget (exclusive of capital funds) does your library spend on materials (books, AV, periodicals, and databases)? \_\_\_\_\_% [Consortium standard is 10%]

Facilities:

7) What is the size of your smallest permanent library structure? \_\_\_\_\_sq. ft.  
[Consortium standard is 10,000 sq. ft.]

8) How far is your library from the nearest LYNX! Consortium library? \_\_\_\_\_miles  
[Consortium standard is 50 miles or under]

Services:

9) Does your library offer weekly value-added programs to youth patrons?  
 Yes  No [Consortium standard is Yes]

Staffing:

10) How many FTE staff does your library have per 1,000 population? \_\_\_\_\_  
[Consortium standard is .5]

11) Does your library have any staff with MLS degrees?  Yes  No  
[Consortium standard is Yes]

12) Does your library have designated and trained reference and readers advisory staff?  
 Yes  No [Consortium standard is Yes]

13) Does your library have any designated or trained youth services staff serving pre-school through high school aged patrons?  Yes  No  
[Consortium standard is Yes]

14) Does your library have IT staff or regular access to outside IT expertise?  
 Yes  No [Consortium standard is Yes]

Prospective members must meet 10 of 14 numbered Consortium Standards (over 70%) to be considered for membership.

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*Survey based upon "LYNX! Consortium Members Standards" adopted by LYNX! Directors, Boise, Idaho, 17 October 2008.*