

**Requirements for Provision of Service to  
Joint-Use Libraries  
by the San Joaquin Valley Library System**

**Approved by SJVLS Administrative Council  
March 9, 2007**

**Background**

The San Joaquin Valley Library System (SJVLS) is a consortia established as a Joint Powers Authority under the California Library Services Act. SJVLS governing agreements require members to be recognized by the California State Library as a public library and to participate in resource sharing. Funding for system services derives from state CLSA allocations, pooled Transaction Based Reimbursements(TBR) generated by resource sharing, and member fees. Allocation of costs is based on formulas that help all libraries afford quality services provided by the System. Telecommunications costs are heavily subsidized by Federal Universal Service funds (E-Rate) and the California Teleconnect Fund.

When a member of SJVLS enters into an agreement with a non-public library partner institution such as a school to share library facilities, it has an impact on SJVLS well beyond that of a public library branch alone. Before service is provided by SJVLS to a new Joint-Use Facility that requires the use of SJVLS resources, System staff will provide a review of the agreement to the Administrative Council. Council will determine if service will be provided.

- The added cost of the partner's holdings and circulation are factored into the normal formulas for charging the system member, but additional open hours added network traffic are not.
- Special configurations of equipment and of the library automation system to meet specific partner needs require commitment of staff time above and beyond the normal requirements for a branch library and may impact performance of systems.
- Partners often do not want to make their materials available to loan to other libraries and therefore do not generate TBR income, a key piece of the SJVLS funding structure.
- Federal and state laws are often applied differently to school, academic and private libraries than to public libraries in areas such as privacy of records and eligibility for grant and financial assistance programs.

*For these reasons, the joint use library must operate primarily as a public library if any services of SJVLS will be utilized.*

## **Requirements for joint use libraries where the partner library is not an SJVLS member**

To ensure that System resources are used properly and with adequate compensation to the system, SJVLS sets forth the following requirements for joint use facilities. These requirements define the full extent to which the partner library in a joint use facility will be supported by SJVLS. Member libraries may impose more restrictive terms as they see fit in order to ensure the integrity of their resources and services.

1. The library must operate as a public library branch during all open hours.
2. As with all SJVLS library locations, the facility must provide for the security of equipment and materials which are the property of the System and of member libraries.
3. Only employees of the SJVLS member library have full access to the library automation system. Partner library employees may have user access allowing registration of borrowers, check in and checkout, and payment or waiver of fines and fees. Non-library staff are not given staff logins to the library automation system.
4. The public library is expected to provide due oversight of the facilities' operation to ensure that SJVLS policies and procedures are enforced.
5. The SJVLS member library is responsible for training partner library staff regarding the policies and procedures of SJVLS and use of the library automation system. Special attention should be paid to the area of confidentiality of library records. *Public library circulation policies and procedures must be followed and enforced.* Repeated failure of partner library employees to properly follow SJVLS procedures for borrower registration and circulation will result in revocation of staff privileges.
6. Borrowers from the partner institution must be registered as regular public library patrons using the standard codes of the partner public library. All borrowers are considered public library users. Student or employee borrower records are public library records, not student or employment records. Separate statistical codes may be created and applied to borrower records in the database to provide statistics on partner use. Borrowers may not have more than one record in the automation system.
7. Partner-owned materials in the database may be given separate codes to identify items for ownership and statistical purposes, but separate item type codes, which govern circulation rules, will not be created.

8. Library circulation in the automated system will operate under the standard configuration for the member public library and will follow its circulation policies. Automated system configuration to specifically control the circulation of items and privileges of borrowers for the partner institution are not supported. This includes creation of rules to limit checkout of certain materials to borrowers affiliated with the partner institution.

9. SJVLS policy allows most fines and fees to be paid at any location throughout the system and retained by that location, with important exceptions. Staff collecting or waiving fines are expected to be familiar with the details of this policy and to follow it.

10. Use of the cataloging, acquisitions and serials modules for partner materials is not supported, as these modules require a higher degree of staff training and system resources. If the partner wishes to add bibliographic records to the system, they must do so through the public library.

11. Remote user authentication services for partner-purchased databases are not provided.

12. Only computers inside the area defined as the library may be connected to the SJVLS network. The SJVLS network and the partner's network must be physically separate.

13. All computers connected to the SJVLS telecommunications network must be the property of the public library and must adhere to the SJVLS standards and policies for devices on the network.

14. Computers at the facility will have Internet content filtering according to the profile used by the member public library at all of its branches.

15. PC images for the joint use facility will be the same images used at other public library branches. Software programs purchased by the partner are not supported on the library computers. Only the library's standard software is included in the PC image.

16. Use of the computers in the library for activities during non-public library hours is discouraged.

17. The partner institution's information technology and facilities personnel are prohibited from working on System network equipment or devices on the network, including adding devices to the network or changing PC configurations, unless such work is specifically approved and coordinated with the SJVLS System Office working through the member library.

18. The partner inherits no right to use of the services provided by SJVLS to the member libraries except for those services specified here.

19. The SJVLS member library may not charge the partner for Internet access/telecommunications so as to avoid the appearance of "reselling" services which are discounted through federal and state programs based on public library eligibility.

20. Should the public library and the partner end their agreement, the partner's materials will be purged from the library automation system. All borrowers are public library patrons, and remain in the system. Preparation of a bibliographic file of partner library holdings for import into another library automation system would be a billable charge to the partner for the system administrator time required.

### **Requirements for a partner institution to receive full service in a joint use facility**

In order for a non-public library to receive full use of the SJVLS library automation system or other system services, the institution would be required to become a member of SJVLS. Addition of non-public library members would require a change to the governing agreements of SJVLS in several areas. An agreement with the institution specifying the buy-in cost for the existing automation system and annual member charges would be needed. Provision of Internet access to the entire institution would introduce greater complexity to administering the E-rate program and would require significant additional staff time both in application and post-award accounting.

### **Failure to comply with SJVLS rules and procedures**

SJVLS reserves the right to withdraw provision of all or part of the services described here to the non-member library in the joint use facility if, in the opinion of the SJVLS Administrative Council, the continued participation of the library has a detrimental effect on SJVLS operations. Every effort will be made to work with the participants in the joint use facility to address System concerns prior to taking actions to withdraw service.