STATEWIDE LIBRARY CARD REPORTS: Wyoming, Connecticut, Maryland, Iowa

Submitted by: Ken Adams, Honore Bray, Sarah McHugh

1. Wyoming Report

Visit http://www-wsl.state.wy.us/wyld/
Contact: Desiree Sanders (dsaund@state.wy.us , 307-777-6258)

Desiree's report: "We have the benefit of truly being a statewide system. The only libraries that are not part of the SirsiDynix ILS are most of the schools and the University of Wyoming. So, in practice, we've set up libraries' circulation maps with a set of ALL patron rules at the top of each map so that anyone with a library card in the WYLD system can use their card at any library.
http://will.state.wy.us/wyld/network/documents/WYLDcard.html

In fact we encourage people to maintain their individual library cards because we use our ezproxy solution to check their library affiliation and then build remote user access pages that are unique to many libraries (if they've licensed additional resources). We proxy for all the public libraries and currently for three of the community colleges. The patron profile and library affiliation are key to making that work for us.

For the schools we encourage all their students and teachers to get library cards at their local public library. We've also set up authenticated access by IP for all the public K-12 sites in the state.
However, if the users are in a very rural area where their 'local'
library might be 50 miles away... we've networked with the teachers to create dummy logins for Sirsi with usernames like 'ALBYSD' for Albany Co.Sch. Dist. users to log into to use the databases from home."

WYLD CARD POLICY
Approved by the WYLD Network Governing Board and Regional Council, May 31, 2006.

Libraries within the WYLD System, which is largely supported by legislative appropriations, are required to participate in statewide borrowing and lending to patrons holding WYLD library cards. The purpose of this policy is to insure uniform borrowing standards that will enable Wyoming patrons to use the facilities of any cooperating library in Wyoming. Individual libraries may approve more lenient policies.

Borrowing from another WYLD library:

1. Wyoming patrons are allowed to borrow from any WYLD library, regardless of residence, if they meet the following criteria:

    A. Are at least 18 years old (or younger, if approved by the lending library).

    B. Have a patron record in WYLD, and a Wyoming library card. Only when the patron has a record in WYLD and is from a library that does not issue library cards is a photo ID sufficient.

2. Patron records in WYLD are owned jointly by all WYLD member libraries, with the patron's home library recognized as having the primary responsibility and right to manage the record in accordance with their local policy. Because patrons must use a library card and PIN for entering interlibrary loan transactions and for authenticating to a library's databases, it is assumed that a patron may have multiple library cards to match multiple affiliations – e.g. a public library card from his or her home county, a college library card if taking college classes, a school library card if in high school.

3. Public WYLD libraries are required to support each other to the utmost of their ability by not issuing new cards and by refusing service to patrons who are delinquent with other libraries because of fines, fees, overdue or damaged materials. As part of the service provided to enrolled students, academic

and school libraries issue cards to students in good standing and therefore are exempt from this requirement.

4. WYLD libraries collect fines or fees from non-resident patrons using the following guidelines:

   A. Libraries may collect fines from a non-resident patron if the amount is $5.00 or less. They will not be responsible for forwarding the money to the patron's home library

   B. If a non-resident patron has fines or fees over $5.00 the library may, at its discretion, accept payment and forward it to the library where the fines are owed. If payment is accepted for lost or damaged materials, a print or other record of the titles and barcodes of the items being paid for must be enclosed with payment.

      It is recommended that this be done especially when the patron is willing to make out a check payable to the library where the fines are owed which can then be mailed directly. The alternative would be to notify the non-resident patron of the charges and give the patron contact information for the library charging the fines or fees.

5. Libraries agree to lend at least two books to a patron from any other WYLD library. Actual lending limits on numbers and types of materials will vary from library to library

6. Libraries must inform patrons of this WYLD Card Policy and of the minimum standards they can expect to encounter statewide. They must also be informed of applicable individual library policies, which may vary from library to library.

7. WYLD libraries must update the address and phone number of a non-resident patron using their library. When this information is updated, a note should be put in the note field informing the home library of this update so it can be verified in accordance with local policies. The note should include the date, staff initials and library where the update was done. For example: "Address/phone updated, 2/6/06 vh CARB." As a courtesy, an email should be sent to the home library informing staff of the change.

8. Libraries must inform the borrower that he/she is responsible for returning materials to a WYLD library and that overdue notices and fines will be generated from the lending library.

9. Returned materials will be discharged and returned as soon as possible to the lending library at no cost to the patron, ensuring a true state-wide borrowing policy.

10. The WYLD office will be asked to help keep statistics on statewide borrowing to be used in reevaluating these policies.

11. Public Libraries will attempt to recover overdue materials in accordance with their own policies and Wyoming Statues 18-7-105(c) which states "Holders of library cards are responsible for all library materials borrowed on such cards. Whenever library materials are lost, destroyed, or taken from the library and not returned the library board may institute proceedings in any court of competent jurisdiction to recover the materials or the value thereof." Academic and school libraries will follow their own policies for recovering materials.

12. Libraries may request reimbursement from the Wyoming State Library for unrecoverable materials in excess of $25.00 that were checked out by a non-resident patron.

13. The University of Wyoming (UW) supports the idea of statewide borrowing privileges. However, the WYLD system and UW's Voyager system do not share circulation or patron information, so provisions must be made to work around the respective systems. Outside of local residents or those that routinely visit Laramie, the best way to borrow from UW is through Interlibrary Loan.

University of Wyoming Libraries are open to all Wyoming residents. A UW library card may be obtained by presenting a Wyoming drivers license and supplying the necessary registration information. Free library cards are also issued to alumni, Wyoming corporations, Wyoming minors (with parental permission slip), participants in on-campus workshops, and reciprocal borrowing agreement patrons. There is a charge of $10 per year for non-Wyoming residents, non-Wyoming minors, and non-Wyoming corporations.

14. This agreement will be reviewed in 2007 by the Patron Database Management Committee with recommendations made to the WYLD Governing Board and WYLD Regional Council.

http://will.state.wy.us/wyld/network/documents/WYLDcard.html

2. Maryland and Connecticut Report

Maryland Info:
visit: http:www.maplaonline.org
Contact: Wendy Dobson (Director of Resource Sharing 410-545-6344)

Possibly older info from this website:

Maryland has state-wide library access. It is through use of local cards. Any public library card from any library in the state may be used at any other library in the state. Many of the cards can be used in other systems "as is." If not, the user just gets a new library card where they are on the spot, the current card serving as all the identity they need. No one charges anyone anything. All libraries contribute toward a fund that moves books around the state every day in order to fill ILL's and transfers.

Patrons sometimes get a new library card from a system. Depending on the system new barcodes are simply attached to the card. Maryland has a state-wide ILL delivery system that is primarily supported by the state and some local libraries. Patrons may return materials from any system anywhere in the state.

Ken's input: In 2005/6, the state implemented the use of SirsiDynix's URSA software which has a reciprocal borrowing module. This software uses various methods to interface with multiple vendor ILS's to automatically obtain patron info and create new patron records. It works fairly well between Horizon and Unicorn systems using the NCIP protocol. It uses "screen scraping" (old technology) to interface with Innovative, GEAC and Dynix Classic ILS. The last I heard there has been no further progress since I left the company last May, getting the software to interface with ILS's other than those listed above. In talking with Wendy, she stated that some libraries are happy with the Reciprocal Borrowing software but most of them either don't or can't use it and end up calling the patron's home library for verification or just trust the visiting patron and create a new card. It's interesting to note that the state created a library card called Maryland Power Card (MPower) that is ventricular in design so that it shows the state design AND the home library design depending on the angle it is viewed. An example can be seen at: http://www.hcplonline.info/services/statecard.html. An example press release about the card can be seen at: http://www.lenstar.org/news/other_success/Library_Card.pdf

Connecticut Info:
Contact: Kathi Bade 860-298-5322 ext 1010 (Library Connection - state rep for Connecticard) or Amy Terlaga: 203-577-4070 ext 101 (Bibliomation)

Visit: http://www.cslib.org/barcodeguide.htm
Info from this website:

Connecticard is a cooperative program among the state's public libraries, administered by the State Library under Section 11-31 of the General Statutes of Connecticut that allows any resident of the state to use the borrower card issued by his or her home public library to borrow from any other public library in the state. For a list of libraries participating in Connecticard see the Public Library Directory. Materials borrowed through this program may be returned to any of the 192 libraries participating in the program. They will be delivered to the owning library by Connecticut's library delivery service, Connecticard. Libraries receive an annual reimbursement from the State Library for providing this service to non-residents. The 11-year total through 1997 was $7.1 million for Connecticut's 3.3 million residents. Connecticard circulation totaled 3.7 million for 1997/98. That was 14.3% of all Connecticut circulation.

The formula for determining grant amounts to libraries is included in the state statutes. Payments are made annually. One-half of the total funds appropriated is used to reimburse participating libraries for all reported Connecticard loans. The other half is used to make an additional payment to those libraries that loaned more items to non-residents than their resident card holders borrowed from public libraries in other towns.

Statutory References are:
Conn. General Statutes (CGS) 11-31a, 11-31b, 11-31c. Regulations of Conn. State Agencies, Sec. 11-31c-1, 11-31c-2, 11-31c-3, 11-31c-4, 11-31c-5.

Eligibility for Connecticard
All public libraries in the state of Connecticut that:

- have a signed Letter of Agreement on file with the State Library
- File a record of the number of items loaned to non-residents of the town or towns it normally serves not later than seven days after March 1 and September 1 of each year (or monthly) with the State Library Board
- Submit by November 1 of each year an Annual Connecticard Expenditure Report

Ken's Input: I have as yet been unable to talk personally with Kathi. Amy is out of town until Dec 17. I worked with The Library Connection and Bibliomation in 2006 to get the URSA Reciprocal Borrowing module working between these two systems (Unicorn and Horizon) using the NCIP "LookupUser" and "CreateUser" messages. They weren't happy at all with the initial product and we made some modifications for them that got it closer to what they wanted. As far as I know there has been no progress since I left the company last May. I may be able to provide more up to date information after talking with Kathi or Amy.

3. Iowa Report
Contact: Barbara Corson 800-248-4483,
(Program Director for Library Services
State Library of Iowa)

Visit: www.statelibraryofiowa.org

Iowa does not have a state-wide card. They have a state-wide ILL system at http://z3950.silo.lib.ia.us/cgi-bin/zform.CGI?SILO.

They also have a program called AccessPlus which most libraries participate in. Iowans can check out a book from any participating library, but they must first apply for a library card at whatever library they want to use.

Other:
(Honore is investigating Georgia Pines for further information on their statewide library card system within their Evergreen open source library automation system.)

More info from Connecticut for a statewide library card. Don't know if it's too late
to get incorporated into the report for the Fulfillment Task Force but thought I should
pass it along anyway.

Ken

-----Original Message-----
From: Kathi Bade [mailto:kabade@libraryconnection.info]
Sent: Wednesday, December 26, 2007 10:48 AM
To: Adams, Ken
Subject: Your call regarding a statewide library card

Hi, Ken.

I am SO sorry I haven't responded to your call! It came during a really busy period,
and the pad of sticky notes that I jotted it down on fell under my desk, and I just
found it!

If I remember, you are looking at doing a statewide library card. No doubt you
contacted me because in addition to being your "buddy" on demand management, I was also
Co-Chair of the Connecticut Library Association Statewide Library Card Taskforce, and
you found that via Google. :-)

Our taskforce formed around 1997, I think. Unfortunately, the name was a misnomer. We
already had a statewide library card. I believe it was enacted around 1976 as part of
a program called "Target 76", in conjunction with the bicentennial. I didn't know much
about it at the time, but it established a statewide library card through a program
called Connecticard. You can get info on that at the CT State Library website,
cslib.org.

The original mission involved a standard look-and-feel library card
to promote the concept of the statewide card.   In Connecticut,
libraries are a service of the local town. Because Connecticut has no county system of
libraries, each town has its own library, its own jurisdiction - and wants its library
card to be distinctive to reflect the separate jurisdiction which funds the library.

The mission was changed because we kind of knew that a standard card plugging the
statewide library card was not going to fly. But I knew what was really needed was a
way for all libraries with automated systems to be able to read the same BARCODE, and
that's what we decided to do. Our consortium had a CARL system at the time, and it was
an act of congress that took months to work out the technical issues which I can't go
into because it was proprietary info. But I did it, and then I shared the info with
the other CARL consortium in the state. I couldn't help the III libraries or any of
the libraries with other vendors with the technical stuff, but our taskforce did
establish the goal of making the barcodes work in all systems by working with your
vendor (or consortium) about any configuration issues with the software, and with your
barcode reader vendor to
program the scanners to read the other barcodes.   Public libraries
are SUPPOSED to use the barcode from the patron's home library to register the patron
in their library or, in the case of the consortium, all the consortium libraries. The
patron has 1 library card (state law under the Connecticard program), 1 barcode, but
multiple records in automated systems (1 record in each library or consortium they
use). No more library cards plastered with barcodes from different libraries! The
project really should have been called the Statewide Reciprocal Barcode project; but we
didn't think of that until the "Statewide Library Card Taskforce" terminology was fully
ensconced statewide. :-)

Luckily, our project worked in with the State Library's creation of the ICONN service,
so we asked them to take over the assignment of barcode prefixes, and create prefixes
for the non-automated libraries so patrons of those libraries could use libraries with
automated systems as well as the statewide databases. The State Library didn't want to
do an "unfunded mandate", so they bought the first supply of barcodes for those little

libraries with newly-assigned prefixes, and asked them to barcode their patron's cards. They also asked libraries with small standalone systems with short ID numbers to switch to the 14-digit Codabar barcode already in use in so many libraries, and bought them the first supply of barcodes also.

Because the consortia had been given barcode prefix "ranges" (not sure by whom - automation via consortia started around 1979; I came on board in 1984), we wound up with no duplication of prefixes amongst the over 100 automated libraries (out of 194 public libraries in the state in a state with 169 towns - go figure!) as well as the schools and academic libraries that were participating in the statewide database program.

So in a nutshell, that was our 3 year project (which also involved discussing the modifications of the Connecticard regulations to account for not having to have a user name on what was then the new concept of the "keychain" pre-barcoded library card). It was a great joy for me to walk into our consortium's largest public library one Saturday with friends from another consortium who did not have a record in our consortium, see the library staff (who were part-time and didn't know who I was) take my friend's card and create a record on our system for him using his home town library card. Our project in action! Unfortunately, there are many staff who still don't know this, so I have no illusion that this actually is always done and that there are no patrons walking around without additional barcodes on their card. But we made strides on it, and proved it can work.

If you are trying to create a statewide library card, take a look at all the stuff on Connecticard, and contact Sharon Brettschneider, the Director of Library Development at the Connecticut State Library (who oversees the program). She can be reached at: SBrett@cslib.org.
You can always talk to me also if you need any more info about anything I've said here. The good thing about Unicorn is it takes any User ID, so our project was fully functional on "day 1" of our migration to Unicorn, vs. the months it took me and our computer operator on the CARL system. :-)

Best of luck with your project, which will be a great service to the citizens of Montana.

Best regards,

Kathi, devoted Connecticard user :-)

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Fax: 860-298-5328
e-mail: kabade@libraryconnection.info

The information about Iowa in this follow up report is backwards. I shared the correct information in my WIRED-MT posting of 12-18-07, but will quote the specifics of the Open Access and Access Plus programs from the *FY06 Enrich Iowa Report: State Funding for Iowa Libraries*, prepared for Governor Chester J. Culver and the Iowa General Assembly, January 15, 2007, available from the State Library of Iowa website. The first page of this report includes the following.

"**Open Access** allows Iowans to walk into any participating Iowa library and borrow books and other materials. Borrowers simply return the materials to their local public library, which will pay to ship the items back to the loaning library. Open Access reimburses a small portion of the expense involved. Iowans checked out 3,606,345 items from 605 libraries in FY06. Open Access funding in FY06 was $1,094,376 ($436,431 from the general fund and $630,946 from the Rebuild Iowa Infrastructure Fund.

Libraries are reimbursed part of the cost of mailing materials to other Iowa libraries through the **Access Plus** interlibrary loan program, which allows Iowans to borrow books and materials from another library if their library doesn't own them. The 605 participating libraries loaned 259,497 items in FY06. Access Plus funding in FY06 was $302,604 ($235,000 from the general fund and $147,596 from the Rebuild Iowa Infrastructure Fund."

Open Access is the statewide library card program, although it does not utilize a physical card. Access Plus is simply the interlibrary loan reimbursement program. As I noted in my earlier posting, the statewide card program generates 14 times the number of circulations that interlibrary loan does.

Bill

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From: Staffeldt, Darlene [mailto:dstaffeldt@mt.gov]
Sent: Friday, December 21, 2007 3:48 PM
To: Bruce Newell (bnewell@mt.net); carowells3@nemont.net; chotlibr@montanavision.net; Cochran, Bill; gbacon@mtlib.org; glibrary@northerntel.net; guthmill@montana.edu; hbray@missoula.lib.mt.us; John Meckler (jemeckler@gmail.com); mthayer@niaid.nih.gov; patricia.collins@umontana.edu; rlibrary@cablemt.net; Ron Moody; rutherforda@milescc.edu
Cc: Cooper, Bob; Cook, Tracy; McHugh, Sarah; Meredith, Maggie; Reymer, Suzanne; Stewart, Julie
Subject: FW: FTF: Follow up tasks

From: McHugh, Sarah
Sent: Friday, December 14, 2007 4:48 PM
To: Staffeldt, Darlene
Cc: Adams, Ken; Honore Bray; Cooper, Bob
Subject: FTF: Follow up tasks

Darlene,
Honore, Ken and I were tasked with checking with Iowa, Wyoming, Connecticut and Maryland regarding their statewide library card situations. Here is that report. Honore may do some additional investigation of the Georgia Pines system, which includes a statewide library card scenario within an open source automated library system.

Sarah

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