

## Zip Books procedural overview

**This is meant as a basic overview of Zip Books procedures, to show the various steps/considerations involved and how they might be handled. Each participating library will adapt/create procedures as needed.**

- 1) Reference desk staff receive a request for an item that not owned by the library.
  - a. Staff search the local catalog to verify the item is not owned. If there is no record in the catalog, staff determine if the customer is eligible, then search Amazon for the item and determines if the request is Zip Books-eligible based on Amazon availability and the project purchasing policies (see “Purchasing policies” document).
  - b. If the request is eligible, reference staff fill out a Zip Books request form (see “Request form” document for sample), which is then routed to ordering staff.
  - c. The customer is given a bookmark that states that the library will try to purchase the item and ship it directly to them, and asked to return the bookmark to the library with the purchased item when finished.
  - d. Customers may also place a Zip Books request by e-mail, or over the phone, in which case reference staff would complete the Zip Books form and send it on for ordering.
- 2) Ordering staff process the order using the procedures developed by Califa (see “Amazon procedures” document). Ordering staff then call the customer and advise him/her of the Zip Books order and expected delivery date. The request form is placed in a “Zip Books orders” file, filed by customer name.
- 3) Customer receives and reads the book(s) and then returns it/them to the library with the Amazon packing slip and the bookmark(if received). (Customers are directed via a message on the Amazon packing slip to return the book to the customer service desk at the library where the request was placed; see the “Amazon procedures” document). Customer is given a brief survey to complete (see the “Zip Books Survey” document for a sample). Surveys are filed in a “Zip Books surveys” file.
- 4) The request form associated with the returned book is pulled from the “Zip Books orders” file and shelved with the book(s) in the selectors’ area. Selector reviews and decides whether to add the book(s) to the collection or dispose of it in some other way (friends book sale, etc.). Selector files the form in a “Zip Books completed” file.
- 5) On a quarterly basis, staff review the “Zip Books completed” forms, the “Zip Books surveys” form, and downloaded reports from Amazon, complete a report form, and submit the report to the California State Library.