

CDC Media Task Force Report

7 Oct 2003

The Media Task Force (MTF) was established by CDC to review current practices and policies for treating media materials (specifically, CD-ROMs, sound CDs, videotapes, and DVDs), and to propose new policies and arrangements where needed. Its charge was to consider not just the situation in Sterling and Cross Campus, but throughout the library system. In order to provide comprehensive, coordinated, yet sufficiently flexible solutions to problems, the committee represented all major “stakeholder” departments (selectors in RSC and the curatorial areas, Acquisitions, Cataloging, Preservation, and Access Services), and several libraries (SML, CCL, Divinity, and Social Science).

Our report is in three sections. First we review the current conditions and policies for media at YUL. Next we establish our goals for improvements, and consider the options available for meeting those goals. Finally, we present the core of our proposals for handling media throughout YUL, and at SML in particular, along with some cost estimates. Our detailed proposals appear as an appendix.

CURRENT CONDITIONS AND POLICIES

Public Services

Short of requesting a special report from LSO, the best way to derive ballpark figures for current media holdings is through Orbis. Searches suggest that there are around 2100 titles with CD-ROMs at SML/CCL, another 1560 at GDC, just over 400 at Medical, and some 6550 in the entire system. However, some titles have multiple items, and we know of several very large CD-ROM sets, such as the *Archivum secretum vaticanum* (over 600 disks now, it will grow to many times that number) and the *Balinese historical and instructional study materials archive* (ca. 270 disks). Consequently, we estimate that SML/CCL alone currently have roughly 4000 CD-ROMs, and around 8500 in the entire system. As for videorecordings (tapes and DVDs), Orbis indicates that the Sterling and Cross Campus Libraries have about 650 (excluding over 4200 in the Fortunoff Video Archive), Divinity has nearly 1300, and there are almost 2500 videorecordings total at YUL (excluding Fortunoff). The following table provides more detailed estimates. The libraries are listed in descending order by estimated number of media items.

	CD-ROMs	Videotapes/DVDs
SML/CCL	4000?	650 (+ Fortunoff)
Divinity	220	1300
Medical	425	280
SSL (+ GDC)	400 (+ 1560)	85 (+ 20)
Engineering	385	25
Art	210	40
Kline	225	5
YUL (all)	8500?	2500 (+ Fortunoff)

Policies and arrangements for handling media vary from library to library. At SML, videorecordings and a few sound recordings are currently shelved at CCL Closed Reserves and can only be used in that building. Stand-alone CD-ROMs are sent to the SML CD-ROM Reference Center, whether or not they are truly reference materials. When books or serials arrive with accompanying materials, the non-print part is separated from the book and shelved at CCL Closed Reserves, while the book goes to the stacks. In addition, videos purchased by SML but shelved at CCL Closed Reserves have been getting a temporary “shelved at” location, rather than a permanent location at CCL Closed Reserves, even though that has in fact been their permanent location. The MTF believes that these arrangements constrict or discourage usage, and create confusion and difficulties for both the end users and the library staff. The awkwardness of these policies also disinclines selectors from ordering materials, or puts received materials into a limbo of uncertain access.

Service arrangements at some of the school and departmental libraries suggest that more open and flexible policies can be successful throughout YUL. At Divinity, when media accompany a book or serial, they are shelved together and circulate together. Disks are stored in a pocket in the back of the book or serial volume. The media item is marked with a Divinity property stamp and given an LC call number. CD-ROMs which are not primarily supplements to a print product are kept behind the circulation desk on reserve. These CD-ROMs may be checked out for use within the library only, for a period of two hours. Many of the CD-ROMs are being made available online on the Divinity network. All other media at the Divinity Library are shelved in the Ministry Resource Center collection, which is open to the public during regular library hours. Videos are shelved by title; all other materials are arranged on the shelves by MRC subject, a local classification system. Media which accompany books and books which accompany media are treated the same. Materials are kept together, usually in the publisher’s packaging. The shelf locations for all the items in the MRC are reflected in Orbis. All MRC materials bypass regular processing, but receive special processing including MRC subject labels, MRC address labels, DIV LIB labels, and barcodes. The videos also receive spine labels on the cassette cases and security tags on the cassette itself. Videos at the MRC circulate for eight days only and are limited to one renewal. All other materials in the MRC (books, books plus media, or media alone) circulate for three weeks. Losses have been few and almost all have been due to damage.

The Social Science Library’s media collection is growing at a rate of between 50 to 75 items per year. Some titles are serials that cumulate; earlier disks are withdrawn as new ones are received. (Depending on the license, superseded disks might be kept in the building or returned to the vendor at the end of the subscription period. The superseded disks are not included in the count.) Videos get LC call numbers and are shelved behind the circulation desk. In general, videos circulate for three days. Recently acquired CDs and DVDs get either the LC or EGC call number (older SSL titles have either an LC or ICPSR number). CDs and DVDs are kept in a metal file cabinet behind the circulation desk, and like videos, circulate for three days. Titles on closed reserve (tied to class assignments or with licensing restrictions) are for 2-hour in-building use only. SSL makes copies of expensive or hard to replace titles; the original does not circulate. Combination print/media publications that circulate are separated: the print is shelved in the stacks while the CD/DVD is kept behind the circulation desk. Materials for in-house use only are also shelved separately behind the

circulation desk. Losses due to circulation have not been a problem when materials are returned to the circulation desk. However, damage have occurred when disks get separated from the case or returned in the bookdrop or through Eli Express.

Accurate statistics reflecting media usage throughout the Yale University Library are not readily available. As a result, the Media Task Force worked with figures based on approximation, experience and limited information offered by current circulation and acquisitions records. It is essential to improve statistical tracking methods to aid future planning and assessment efforts. We are including suggestions toward this end.

Information from the Voyager system (representing FY2002-03) has not yet been gathered and organized. Statistics gathered from Voyager will be categorized by item type. Item types are not always accurately set for media items. Voyager does offer an item field for “Media Type,” but it is not presently used.

Reports from the NOTIS system for FY2001-02 and FY2000-01 detail usage for each service unit, categorized by location. Problems arise when items are “owned” by one unit but shelved elsewhere (such as SML media items shelved in CCL Closed Reserve). It is unclear whether temporary locations are being used regularly and properly. This will also be a problem for Voyager statistics.

Despite these difficulties, there is clear evidence that media usage is increasing rapidly. Furthermore, the Divinity and Social Science Libraries, which both allow videos to circulate, have experienced very little loss, and most of that has been due to damage rather than theft.

Technical Services

Acquisitions

It is currently very difficult, if not impossible, to obtain accurate statistics on how many titles or items the library acquires annually in the various formats. In addition, there is no reliable way to determine how many books we receive that include CDs or other accompanying materials.

Although some media items come on approval (particularly CD-ROMs accompanying books), for the most part all units must firm order these materials. No vendor handles media well, and generally the library must order direct. This is time-consuming for selectors and Acquisitions staff, but unavoidable, at least for the foreseeable future.

When a book including a disk is received, often it isn't obvious whether it is a sound CD, a CD-ROM, or a DVD. Sometimes it's even hard to tell that a disk is included—occasionally they are simply slipped into the book, without so much as a pocket. This creates problems down the line. In addition, sometimes serials include media items, and there is no clear policy on keeping or discarding them. The latter question was discussed by CDC, with input from the MTF; a working policy has emerged, which we have incorporated into our proposals.

Cataloging

Media are cataloged according to AACR2 standards. At SML, Library of Congress call numbers are assigned; at other libraries and collections, another system may be used, such as an accession number system at the Divinity Library's Ministry Resource Center, and SuDoc numbers at the Government Document Center. The Cataloging Department has considered proposing that SML use accession numbers to expedite the processing of some media (especially videos, for which usable copy catalog records are often found). If a copy catalog record lacks a call number, a catalog librarian must review the record and assign an appropriate LC number. By using accession numbers, copy catalogers would be able to move material through the department more rapidly. However, if media are integrated into the SML/CCL general collections, then it will be necessary to continue the current practice of assigning LC call numbers.

We also note that the Cataloging Dept. does not currently have equipment for viewing videotapes and DVDs that use non-US formats, a situation which impedes cataloging these materials.

Preservation

A major consideration is shelving space, which raises the question of using LSF for shelving less-used items. The chief concern over using LSF is the effect of climate changes on CDs and DVDs. The only known reliable study on the subject was done by Kodak in 1995-1996. It found that large fluctuations in temperature and humidity can cause distortion and loss of data contained on CDs. The maximum recommended changes were 27° Fahrenheit per hour and 10% humidity per hour. Since DVDs are more delicate than CDs, one can assume that they would be affected even more by temperature and humidity changes. LSF currently has a system for gradually warming and cooling videotapes, but whether this would be satisfactory for the disks is unknown. On the other hand, simply by letting these items travel outside the building, the library would be accepting the risk of damage to media materials. Moreover, since items selected for LSF are expected to be low-use, the CDs and DVDs shelved there should experience only a few cycles of cooling and warming.

GOALS AND OPTIONS

In developing its proposals, the Media Task Force had three primary goals:

- A. Improve library users' physical and intellectual access to YUL media items.
- B. Treat media items as much like books as the physical format allows, in order to simplify procedures and access.
- C. Protect materials from damage and theft, without significantly impinging on Goal 1.

To meet the first goal, the MTF strongly felt that media items should be:

- allowed to be checked out and taken outside library buildings;
- placed on browsable shelves; and
- if part of a multiformat item, shelved together with the paper portion.

Selectors can, as always, designate items as non-circulating (reference) or restricted (for use only in-building or at a supervised area).

The CD-ROMs that selectors will want to circulate are mainly full-text, raw data, and image resources (rather than databases such as indexes, which would be considered reference material). One can expect that such content would be used in a manner similar to printed texts (i.e., for a few days or more, rather than occasional reference), and therefore these CDs should in general circulate for the same periods that books do, including variation by patron type. However, videorecordings (videotapes and DVDs) are not typically used in that manner: ordinarily they are viewed once and then no longer needed, and if they are not being used, they should be available to others. In addition these formats are significantly more fragile than other media and so should be in uncontrolled environments for less time. For these reasons, videorecordings should circulate for short periods.

Browsability is particularly valuable at SML/CCL, since these libraries cover a large range of subjects. Faculty members have specifically asked for the ability to browse media resources. One implication of this approach is that it would be better to give media materials LC call numbers rather than accession numbers. If media items are intershelved with books, then call numbers are clearly necessary. Call numbers are currently assigned at SML/CCL, so there would be no change in procedures.

The MTF emphatically believes that as a matter of access, all parts of a multiformat title should be shelved together—that the practice of sending the print part to SML and the media part to CCL Closed Reserves must cease. However, we recognize that this increases demand on shelf space, which is of particular concern with those serials which regularly include a CD (e.g., every month). In such situations, shelves would have to accommodate a very large number of media cases along with the bound volumes. At this time only a few periodicals include media that often. However, once LSF is able to receive current serials much of this problem will be alleviated.

Regarding the second goal, the main points where media items are notably different from books are (a) the need for added preservation measures, (b) the need for different security measures, at least for CDs and DVDs, and (c) in the case of videotapes and DVDs, the need to identify encoding format (e.g., NTSC, PAL, Region 3, etc.). From a service perspective, the Library also provides equipment for using media items inside one or more of its buildings (although it need not support obsolete technologies). Any other difference is essentially imposed by library attitudes, preferences and practices, not by the media format. A more detailed statement of format support is included in the appendix.

Finding ways to meet the third major goal presents many challenges to the first; consequently, many of the MTF's ideas developed in the context of possible arrangements for physical protection and

security. Regarding physical protection, leaving the disks in jewel cases is not an option because the cases are very brittle and are unsuitable for transport through Eli Express. The Preservation, Acquisition & Access Services joint committee had developed a plan to have custom CD/DVD cases produced on the model of an existing generic case, which under the best pricing arrangement would cost roughly \$32,000 for 35,000 cases (92¢ each). However, the manufacturer decided not to proceed, and so generic cases are again being contemplated, at 59¢ apiece. Regarding security, the existing detection tape systems are currently used for videocassettes; consequently, the central problem is how to protect disks (CDs, CD-ROMs, DVDs). There are two possible security systems for these materials:

- **Checkpoint.** SML and CCL currently use the Checkpoint system for putting security tags on books and videotapes. However, Checkpoint does not have a way to tag CDs and DVDs. Instead, it offers a hard and almost impenetrable “shell” that contains a CD/DVD case and can only be unlocked with special equipment placed at the Circulation Desk. These shells are relatively expensive (\$4.00 apiece list price; bulk will be cheaper), the unlocking equipment runs around \$250, plus there is the cost of the inner case. Further, the shells are 3/4" to 1" thick, and so take a significant amount of shelf space. However, the shells can be purchased as needed, and they do not require additional stamping because the item’s call number is clearly visible through the shell. Access Services would simply drop the CD/DVD case inside the shell when the item is ready for shelving. When the disk is checked out, Circulation would unlock the shell, give the disk (in its plastic case) to the user, and store the shell until that or any other disk is returned. Checkpoint also offers a shell for videotapes, which can be used in the same way.
- **3M.** The 3M security system is currently used for books at some school and departmental libraries, such as Engineering. This company offers a system for tagging the disks themselves. The CD/DVD cases can be used without further containers, minimizing demand on shelf space. There are two types of security tags: the smaller ones can be used on both CDs and DVDs and at roughly \$1.00 per tag are quite inexpensive. However, SML/CCL and other libraries using Checkpoint would need to buy detection corridors, which cost \$8734 each (list price, including installation). The security stickers must be fitted exactly or they will interfere with the playback quality of the disk, so this process is time-consuming. In addition, it is possible (though not easy) to remove the stickers, and the small stickers produce a weak detection signal which might not register a disk buried deeply in a bag.

Having determined these basic approaches and technical options, the task force considered four major strategies that could meet its three goals at SML, and which may be extended to other libraries. The two main variables are the security systems (3M vs. Checkpoint) and the number of service points (check-out at just one location for restricted access, or at any circulation desk for more open access). Rather than detail the pros and cons of each, we are presenting only the strategy that the Media Task Force unanimously agreed provides the maximum service to library users, is efficient

and cost effective, offers budgetary predictability, and places the minimum overall demand on staff resources.

PROPOSALS

The Media Task Force's recommendations (attached) fall into two parts: those that apply to the entire YUL system, and those that concern SML/CCL specifically. In the first part, we have sought both consistency on the technical services side among all libraries, and flexibility on the public services side for each library. We have also concluded that YUL will have to accept the risks of shelving media materials at LSF, in order to reduce pressure on the stacks.

In the second part, we propose the following: CDs and DVDs should be placed in generic DVD cases for circulation, the cases should receive standard magnetic tags and then be locked in Checkpoint shells for security, and the entire package should then be shelved in the SML and CCL stacks with the books. The MTF also suggests that Checkpoint shells be used for videotapes as well, for added security. Mixed items would not be split: books with CDs would be intershelved along with the other books in the regular stacks. An unlocking device should be available at both circulation desks. The Checkpoint shell system can be put into place immediately and incrementally, has no extraordinary start-up costs, adds the least burden on staff, allows materials to be shelved at the appropriate location (SML, CCL, LSF), maximizes access, provides strong preservation and security support, and is cost effective. Finally, this system can easily be extended to other libraries, including those using the 3M system for books, because aside from the cases and shells, all they would need is an unlocking device. However, we have left the decision on whether to use the Checkpoint system up to each library, since their particular situations may make it unnecessary.

In addition to the shelving and security system, SML/CCL (and possibly other libraries) need equipment for viewing videorecordings in non-US formats such as PAL. Such equipment is available in one carrel at CCL, but this is decidedly inconvenient for catalogers. The Library should also consider making additional multi-standard videotape and DVD players available in public areas.

The approximate unit costs for the materials needed to implement this proposal are as follows:

Generic CD/DVD cases	\$.59	(each case, bulk rate)
Checkpoint shells	4.00	(each shell, list price; bulk will be less)
Unlocking devices	250.00	(each unit, one-time purchases)
Multi-standard video player	650.00	(e.g., Samsung SV7000W)
Multi-standard DVD player	500.00	(e.g., JVC S502SL)
Multi-standard 14" monitor	200.00	(e.g., Panasonic TC14MK30)

In the first year, implementation of the Checkpoint shell plan at SML/CCL would require purchasing two unlocking devices (\$500) plus a significant number of cases and Checkpoint shells for CDs and DVDs (together, 2000 = \$9,180; 3000 = \$13,770; 4000 = \$18,360). Once the existing holdings are

rehoused, the libraries would only purchase cases and shells as needed; 500 sets would total \$2,295. Checkpoint shells for videotapes would initially require an additional \$2,800 (assuming 700 tapes), probably spread over time. Since these estimates are based on the list price of the Checkpoint shells, they are on the high side.

The following table shows the approximate cost for implementation at SML/CCL, at several other libraries, and throughout YUL as a whole. The Government Documents Center has a large media collection but most likely is sufficiently secured; if included, it would add \$8,153 to the startup and \$467 to the ongoing costs under the assumptions below. The “startup” column assumes that all current holdings will be rehoused in within one year, and includes the one-time equipment purchases (the unlocking devices for each library, and a multi-standard video player, DVD player, and monitor) and the receipt of additional media items during that year. The amounts include not only cases and shells for CDs/DVDs, but also shells for videotapes.

	Equipment	Backlog	Annual Intake Estimates		Ongoing	Start-up
SML/CCL	\$1,800	\$21,344	500 CDs	50 videos	\$2,495	\$25,669
Divinity	\$250	\$6,977	15 CDs	160 videos	\$709	\$7,457
Medical	\$250	\$3,234	100 CDs	45 videos	\$639	\$3,504
SSL (w/o GDC)	\$250	\$2,226	70 CDs	5 videos	\$342	\$2,730
Engineering	\$250	\$1,882	50 CDs	1 videos	\$234	\$2,251
Art	\$250	\$1,148	30 CDs	2 videos	\$146	\$1,452
Kline	\$250	\$1,056	25 CDs	1 video	\$119	\$1,426
YUL (w/o GDC)	\$2,500	\$43,146	850 CDs	300 videos	\$5,102	\$50,559
YUL (w/ GDC)	\$2,750	\$50,582	+100 CDs	+2 videos	\$5,569	\$58,391

Costs for Media Security and Preservation System

However, in implementing the proposal, SML and CCL will face costs beyond cases and equipment: many media items will need to be reunited with books. (The number of these is very hard to determine: probably below 1500 and possibly even below 750.) While the physical part of putting the books and media together is straightforward and can be accomplished using student labor, changing location codes and spine labels requires staff time.

Since almost all media items purchased by RSC and curators are for relatively specialized research and so would be shelved in SML or LSF, the proposal’s implications for Phase 2 renovations are nominal: we estimate that CCL’s open stacks would need to accommodate up to 300 media items. Viewing facilities for individuals, small groups and classes are planned in any case; having all equipped with multi-standard videotape and DVD players would be advisable.

The discussion presented in this report covers the major issues the Media Task Force identified. Various secondary recommendations also emerged, which we are including in our proposals without comment. We did not feel it necessary to stipulate implementation procedures, as these should be

developed by the individual libraries and within the affected departments, in coordination with the rest of the unit.

Respectfully submitted,

Edita Baradi (Social Science Library)

Eric Friede (Divinity Library)

Rich Richie (curatorial areas)

Tobin Nellhaus (Research Services and Collections; CDC chair), *chair*

Rick Sarcia (Cataloging)

Charles Best/Liz Shaw (Acquisitions)

Lisa Thomas (Access Services, Cross Campus Library)

David Walls (Preservation)

GENERAL SYSTEM-WIDE PROPOSALS

I. Selectors

- A. Whenever possible, selectors should designate items for reference use upon ordering, for inclusion in the order record so that the item may be flagged on receipt. However, selectors may make that determination upon receipt, by using a flag or form for that purpose.
- B. If a selector has or can obtain indication that a videorecording is in a non-US format (such as PAL), such information should be sent to Acquisitions for inclusion in the order record.
- C. Selectors should try to make certain before ordering that CD-ROMs will work properly on their library's current computer hardware and software.
- D. On receipt, selectors will determine each item's appropriate shelving and circulation status (stacks, Ref, LSF, LSF-R, etc.) as they do with books.
- E. Selectors may recommend adding subject or genre headings if they determine that there is significant interest in a particular group of materials that cannot otherwise be identified using existing subject headings.
- F. When the library receives a new edition or update for a CD-ROM, or a CD-ROM accompanying an online resource, selectors will determine whether the old version should be kept (either available to public or in an archive) or de-accessioned. They may establish standing policies for particular resources or categories.
- G. Selectors will determine guidelines for keeping media items that accompany books and serials. The Media Task Force and CDC have devised the following guidelines for the immediate future:

Media items with content that can be used without additional payment (e.g., articles, data, music, "freeware," etc) shall be kept, even if the item also has a commercial or advertising purpose. Items with a primarily commercial or advertising purpose which cannot be used without payment or lose their value after a set period without payment (e.g., "1000 free hours of AOL") shall be discarded. Any item not clearly fitting these categories shall be referred to the appropriate selector for decision. Selectors may overrule these general guidelines as needed.

II. Technical Services

- A. Ordering
 1. Ordering staff should develop a method for tracking how many items are ordered in the different formats (e.g. videotape, DVD, CD-ROM, sound CD), with the categories to be determined in conjunction with CDC. If a system within Voyager can be used or adjusted for this purpose (such as the Reporting Fund or Media Type codes), that will meet this goal well.
- B. Monographic receipts
 1. Monograph receiving staff will put media materials, including items accompanying books, into the appropriate cases.
 2. Each major piece will receive its own item record and barcode. This does not include simple 1-2 page inserts.

3. The barcode sticker should be placed inside the case, so that Circulation staff members confirm that a CD is in the case when it is charged and discharged, and to encourage them to check if it is the correct CD.
- C. Serials receipts
1. Non-circulating CD-ROMs that update reference databases should proceed through the same cataloging and preparation process as their print equivalents.
 2. SST will put media materials included with serials into the appropriate cases.
- D. Cataloging
1. The Cataloging Dept should keep count of books that include CDs or other accompanying non-print materials.
 2. MARC fixed fields designating physical formats (the 007, and when appropriate, 006 for accompanying material) should be used consistently by all library units.
 3. Videorecording format identification
 - a. The Cataloging Dept. will identify the encoding format used for videorecordings. In order to do so, the library should equip the Cataloging Dept with multi-standard videotape and DVD players.
 - b. When the videorecording cannot be viewed on US-standard equipment, the cataloger will enter the encoding information into the bibliographic record according to AACR2 practices, and include a format identification sticker with the item when it proceeds to Preparations.
 - (1) Videotapes: If the format is not NTSC (the US standard), then include a label reading "PAL/SECAM"
 - (2) DVDs: If the format is not Region 1 or all-region, then include a label that indicates the region number.
 4. Each library unit determines whether to use LC call numbers or accession numbers. However, LC call numbers are recommended, and no new accession number systems should be created.
 5. CDs and DVDs will have their call number and library location written onto the hub (but not elsewhere on the disk), in order to help Circulation staff ascertain during charging and discharging that the disk is YUL property and matches its container.
 6. When a media item such as a CD-ROM contains multiple titles, the Cataloging Dept. will determine when to use added entries or analytic records. The main goal is for library patrons to easily see what titles are available and know when the title and all other titles on that resource are checked out.
 7. When a serial regularly includes a media resource such as a sound CD or a CD-ROM, Cataloging will determine how best to represent that information in the bibliographic, holdings and item records. The Media Task Force has not found any problematic issues arising from other aspects of this proposal.
 8. Whenever possible, subject and genre headings should be added when a selector recommends them. The exact genre heading will be determined by agreement between the selector and the appropriate cataloger.
- E. Preparations
1. Preparations staff will apply the appropriate security tag to the CD/DVD case.

III. Access Services

A. Shelving

1. All libraries and collections may choose to use the same Checkpoint shells proposed for use at SML.
2. Monographic media items may be shelved either on campus or at LSF, as determined by selectors in accordance with the most current guidelines for sending materials to LSF.
3. Mixed-media titles
 - a. Monographic titles: all parts of mixed-media monographs will be shelved at a single building, preferably on the same shelf. The practice of separating books and their accompanying media and placing them in separate locations will cease.
 - b. Serials: when CDs or other media regularly accompany serials (e.g., with every issue), all of the media part should be shelved together in either the stacks or (for all or part of the serial run) at LSF.
4. Each library will determine the shelving practices for mixed media within their buildings.
5. OPAC location information should reflect the shelving location, not the owning library. The message “temporarily shelved at” should only be used if the item’s location is genuinely temporary.
6. Electronic Collections will determine an appropriate location for archival CD-ROMs when the Library has the resource available online.

B. Recommended circulation policies

1. Each library unit determines its own standard circulation policies, from the most current options supported by Access Services. The Media Task Force recognizes that some libraries (such as Divinity) may want or already have policies different from some or all of the recommendations below.
2. The major recommendation is that policies at each library should be simple and consistent.
3. Circulating items
 - a. Within Yale, the same circulation types (circ, LSF-R, etc.) should be available for media items as for books.
 - b. Circulation periods
 - (1) CD-ROMs should circulate according to the same policies as books at that library, including variation by patron status (undergraduate, faculty, etc.). For example, CD-ROMs at CCL should circulate to undergrads for three weeks, except when put on Reserve for a class (in which case the usual options would be available).
 - (2) Videotapes and DVDs should circulate for one week. We advise giving these formats a shorter circulation period because they are typically viewed once in a brief period and are significantly more fragile than CDs.

- (3) Exceptions for particular items (including reference items) may be made on an ad hoc basis for special situations. Whenever possible, circulation staff should obtain approval for such exceptions from the appropriate selector.
 - c. LSF-R materials
 - (1) LSF-R items should be used at their owning library in the same manner as printed materials, except at SML (see below).
 - (2) Restricted items will remain at the restricted use location until the user no longer needs it or it has not been used for a week, whichever comes first.
 - d. Interlibrary Loan policies will be determined by each library. However, special attention should be paid to videorecordings, which in addition to their fragility may have licenses which limit or exclude use by nonmembers of the Yale community. It will probably be simplest to exclude them from ILL, Borrow Direct and other services to libraries outside Yale.
- C. Technical support for borrowers of media items
- 1. New playback equipment that the Library purchases will have multi-standard (but not necessarily multi-format) capacity, when available.
 - 2. Libraries are not required to provide support for circulating media items outside the Library. YUL will not guarantee that any circulating item will operate properly on any equipment outside the library's control.
 - 3. YUL will not accept liability for any damage or loss of data caused by using media items. Library patrons will be informed of this in some manner, such as a label on the Checkpoint shell.
 - 4. Libraries will install reference CD-ROMs on their own equipment and provide support for their use.
 - 5. Libraries will make sure that their computer and playback equipment are in good working condition.
 - 6. YUL will not be obligated to provide support for technologies that are obsolete or no longer widely used (such as Beta videotapes, 5¼" floppies, etc.), though it will attempt to do so as long as feasible.

IV. Evaluation

- A. In FY 2007-08 or 2008-09, CDC shall establish a Task Force to evaluate the effectiveness of the new policies and procedures, analyze any problems that may have arisen from them, and recommend changes they it feels are necessary.

SML/CCL PROPOSALS

I. Selectors

- A. Unless a fund is restricted to a specific format, RSC and curators should use the funds they administer in order to purchase media items, under the same policies as for books. Likewise, the guidelines for purchasing books using CCLANON also apply to media materials.
- B. When books and media items are reunited, selectors will determine the shelving location for each title.

II. Technical Services

- A. Cataloging will assign LC call numbers to all titles.

III. Access Services

- A. Shelving
 - 1. Before shelving, Access Services will lock disks (in their CD/DVD cases) and videotapes (in their own cases) into Checkpoint shells.
 - 2. Media items (except for reference items) may be shelved in the open stacks at SML or CCL, or at LSF, as designated by selectors.
 - 3. Media materials currently at Closed Reserves that are part of a multi-format title will be reunited with the material in the stacks, after receiving the proper preparation, location code changes, and bibliographic changes (if needed).
 - 4. The SML CD-ROM Reference Center will continue to provide access to noncirculating CD-ROMs, including those accompanying reference books if the selector chooses to have the CD-ROM part installed.
 - 5. These guidelines apply to materials purchased by curators as well as RSC.
- B. Suggested circulation policies
 - 1. Circulation periods for CD-ROMs should be the same as for books in the owning library.
 - 2. Videorecordings (tapes and DVDs) at either library should circulate for one week, and be limited to one renewal.
 - 3. The service point for SML's restricted media materials (LSF-R) media items will be determined by the CCL/SML implementation team in consultation with the relevant department heads.
 - 4. Interlibrary Loan.
 - a. CD-ROMs and book/CD-ROM combinations may circulate through ILL.
 - b. Video and sound recordings (in all formats) may not circulate through ILL.
- C. Technical support
 - 1. The service point for SML's LSF-R media materials will provide only very basic assistance to library patrons using in-building resources (e.g., "Set the DVD player to Region 3, as it says on the case").
 - 2. RSC will provide support for problems or questions concerning in-building use of CD-ROMs that cannot be resolved by immediate available staff.

IV. Implementation

- A. The CDC Media Task Force will continue, in order to coordinate implementation of the MTF proposal and resolve any questions that arise. Department heads may have their current representative remain on the Task Force, or rotate that position to another member of the department.