

PLS Executive Committee Agenda

November 3, 2023

1:00 p.m. via Zoom

<https://us06web.zoom.us/j/87687277128?pwd=9bylbR0CHru7TXCfRiv4blbZcBwJHO.1>

Meeting ID: 876 8727 7128; Passcode: 194110

Call-in Option: 669 444 9171 US

Peninsula Library System Executive Committee

Tim Wallace, San Bruno Public Library (Chair)

Derek Wolfgram, Redwood City Public Library

Anne-Marie Despain, San Mateo County Libraries (Vice Chair)

James Moore, San Mateo Public Library

I. Approval of Consent Items (Action Item)

- | | | |
|--|---------|---------------------|
| A. Adoption of Agenda | Wallace | |
| B. Approval of September 7, 2023 Minutes | Wallace | Attachment 1, pg. 3 |

II. Old Business

- | | | |
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| A. Recommendations on Free Printing for PLS Libraries (Action Item) | Walden | Attachment 2, pg. 6 |
|--|--------|---------------------|

III. New Business

- | | | |
|---|--------|----------------------|
| A. Comparison of BiblioCore and Vega Discovery Layers (Action Item) | Walden | Attachment 3, pg. 15 |
| B. Budget for PLS Shared OverDrive Collection (Action Item) | Frost | Attachment 4, pg. 25 |
| C. PLP CLSA Allocation to PLS Libraries for FY 2023-24 (Action Item) | Frost | Attachment 5, pg. 29 |

IV. Reports

- | | | |
|-------------------|-------|--|
| A. Administration | Frost | |
|-------------------|-------|--|

V. Public Comment - (Individuals are allowed three minutes, groups in attendance five minutes. It is system policy to refer matters raised in this forum to staff for further investigation or action if appropriate. The Brown Act prohibits the Executive Committee from discussing or acting on any matter not agendaized pursuant to state law.)

VI. Agenda Building for the Next Meeting on January 4, 2024

VII. Announcements

VIII. Adjournment

Brown Act: This meeting abides by Cal. Gov't Code § 54953.

Cal. Gov't Code § 54953(b)(1) "Notwithstanding any other provision of law, the legislative body of a local agency may use teleconferencing for the benefit of the public and the legislative body of a local agency in connection with any meeting or proceeding authorized by law. The teleconferenced meeting or proceeding shall comply with all otherwise applicable requirements of this chapter and all otherwise applicable provisions of law relating to a specific type of meeting or proceeding."

Cal. Gov't Code § 54953(j)(6) A "teleconference" is "a meeting of a legislative body, the members of which are in different locations, connected by electronic means, through either audio or video, or both."

Gov't Code § 54953 (b)(2) "Teleconferencing, as authorized by this section, may be used for all purposes in connection with any meeting within the subject matter jurisdiction of the legislative body. If the legislative body of a local agency elects to use teleconferencing, the legislative body of a local agency shall comply with all of the following:

- (A) All votes taken during a teleconferenced meeting shall be by rollcall.
 - (B) The teleconferenced meetings shall be conducted in a manner that protects the statutory and constitutional rights of the parties or the public appearing before the legislative body of a local agency.
 - (C) The legislative body shall give notice of the meeting and post agendas as otherwise required by this chapter.
 - (D) The legislative body shall allow members of the public to access the meeting and the agenda shall provide an opportunity for members of the public to address the legislative body directly pursuant to Section 54954.3."
- Gov't Code § 54953 (3) "If the legislative body of a local agency elects to use teleconferencing, it shall post agendas at all teleconference locations. Each teleconference location shall be identified in the notice and agenda of the meeting or proceeding, and each teleconference location shall be accessible to the public. During the teleconference, at least a quorum of the members of the legislative body shall participate from locations within the boundaries of the territory over which the local agency exercises jurisdiction, except as provided in subdivisions (d) and (e)."

Meeting Locations

- Redwood City Public Library, 1044 Middlefield Road, Redwood City, 94063
- San Bruno Public Library, 701 Angus Avenue W., San Bruno, CA 94006
- San Mateo County Library, 125 Lessingia Court, San Mateo, CA 94402
- San Mateo Public Library, 55 W. Third Avenue, San Mateo, CA 94402
- PLS/PLP Offices, 32 West 25th Avenue, Suite 201, San Mateo, CA 94403

**PLS Executive Committee
September 7, 2023
2:00 p.m. via Zoom**

MINUTES

Committee:

Tim Wallace, Chair, San Bruno Public Library
Derek Wolfgram, Redwood City Public Library
Anne-Marie Despain, Vice Chair, San Mateo County Libraries
James Moore, Vice Chair, San Mateo Public Library

System Staff:

Carol Frost, PLS
Justin Wasterlain, PLS
Andrew Yon, PLS
Farrukh Farid, PLAN
Vanessa Walden, PLAN
Natalie Juhl, DCL

The meeting was called to order at 2:02 p.m. by Chair Wallace.

I. Approval of Consent Items**A. Adoption of Agenda****B. Approval of May 9, 2023 Minutes**

The Consent Items were approved via roll-call vote. Wolfgram voted to approve the agenda but abstained from approving the May 9, 2023 Minutes. All others voted in the affirmative. (Moore/Despain)

II. Old Business**A. Recommendation to Continue Traditional ILL Services**

Walden described usage trends of ILL services prior to and after the community colleges moved to a different ILS system. She noted requesting materials became less convenient after the change and usage subsequently decreased. Walden reported the WorldShare Task Force performed research and was unable to locate a viable replacement system and recommended to maintain the current traditional ILL system. Moore inquired why the libraries would keep a system that had low usage. Walden responded the current system requires very little staff time or resources to maintain, it is still being used by patrons, and it fulfills the JPA requirement for resource sharing among all members. Juhl added maintaining traditional ILL services maintains a relationship with the community colleges. Walden noted the Task Force would be disbanded following this report, but that the Circulation Managers could reconvene the Task Force if needed. A motion was made, and passed unanimously via roll-call vote, to approve the WorldShare Task Force recommendation to maintain the current traditional ILL system. (Moore/Despain)

III. New Business**A. Consideration of ILS Study**

Frost reviewed the discussion of an ILS comparison study that was proposed during discussion at the June 6, 2023 PLS Administrative Council meeting. She noted it was suggested an Ad Hoc Group could be formed that would determine the goals, process,

and timeline for such as study. She noted that the current Council priority of cybersecurity mitigation will be completed in June 2025. The Committee discussed whether the ILS study would become a higher priority than the cybersecurity mitigation project. Moore stated if the choice was either cybersecurity or an ILS study, cybersecurity should remain the priority. The other members agreed.

It was discussed whether a consultant familiar with the ILS industry should be hired to provide expertise and assist the comparison study. Moore asked if a comparison study could be done in a way that would reduce PLAN staff time. Frost pointed out that the requirements of the consortia are such that an out-of-the-box quote from a vendor would not represent the complex needs of a consortia. The process will require PLAN involvement to ensure the vendors understand the requirements of the system. Wolfgram stated it would be appropriate to pursue a comparison study with the assistance from an outside consultant, noting the consultant would reduce the work needed to be performed by PLAN.

Wolfgram suggested PLS could do a Request for Qualifications to understand which vendors were capable of meeting the specific needs of the system. A Request for Purchase could be considered following that if the Council felt there was need to do so. He added the process could be reduced to only a Request for Purchase with bids not meeting the requirements being rejected. Moore acknowledged it is reasonable and good practice to reevaluate a vendor contract after many years, but it needs to be done on a timeline when capacity and resources are available. Moore and Wolfgram described the project as important, but not urgent.

Wolfgram reminded the Committee that a system migration is a time-consuming and expensive process that costs more than just the expense for the ILS. Staff time, consultant fees, implementation costs, and all other related factors need to be assessed to understand if the true cost is actually lower. Despain asked if there was a mandate in the PLS purchasing policy that would require the system to go out to bid when the current three-year ILS contract ends in FY 2025-26. Yon replied there was not, but a bidding process would be necessary if choosing to acquire a new ILS. Despain requested to know what hiring a consultant would cost. Yon confirmed consultant costs would need to be put in the PLAN budget in the fiscal year the study was planned to be conducted. Despain suggested it may be possible to compare major features of viable vendors even if not all specific requirements were able to be compared. She stated the group should start small with a comparison study before going into an RFP. Wallace proposed a consultant could evaluate if there were other vendors who could meet the system's needs. Moore suggested the study could be done at the beginning of FY 2025-26 and followed by an RFP if determined necessary.

IV. Reports

A. Administration

Frost reported staff were negotiating with a potential tenant for a downstairs suite at the PLS office. Frost stated she was contacted by a representative from the San Mateo County Fair who would like to involve more PLS libraries for the fair's 90th anniversary next year.

V. Public Comment

No public comments were made.

VI. Setting Date and Agenda Building for the Next Meeting

The November 2, 2023 meeting will be moved to November 3, 2023 at 1:00 p.m.

VII. Announcements

No announcements made.

VIII. Adjournment

The meeting was adjourned at 3:06 p.m. by Chair Wallace.

To: PLS Executive Committee
From: PLS Circulation Managers Committee
Subject: Report on Free Printing for PLS
Date: November 3, 2023

Background

The PLS Administrative Council, at their meeting on December 1, 2022, directed the Circulation Managers Committee to present recommendations about whether it would be feasible to implement a fee-free printing and copying policy throughout the consortium or if it should be left to each jurisdiction to enforce their local policy since the fees may be part of the city or county's master fee schedule. This exploration into free printing and copying includes an analysis of patron printing behaviors and associated library costs at all PLS libraries.

- A comparison of print job sizes (small, medium, and large)
- A comparison of print jobs paid for with credit cards or cash
- Estimated costs and staff time for printing with and without fees
- Limitations of implementing free printing with Envisionware print management software (LPT1)
- Include print (hard-wired or wireless) and copy jobs in the data analysis

During the meeting on December 1, 2022, the PLS Administrative Council also requested an update about the implementation and maintenance of free printing at the San Mateo County Libraries (SMCL) and San Mateo County Community College District (SMCCCD). SMCL implemented free printing as a pilot program at the Portola Valley Library in March 2021 and expanded it to all the SMCL branches in April 2021. Menlo Park Library (MPL) also stopped charging for printing services when the library reopened in 2021. The PLS Administrative Council identified these questions for the Circulation Managers Committee to answer:

- What is the volume of printing before and after free printing was implemented?
- Are there any notable behavioral changes by patrons regarding print and/or copy jobs?
- Are there differences in cost and/or staff time to manage printing and copying services before and after free printing was implemented?
- Has the frequency of large or extra-large print jobs changed?

The public libraries in PLS use Envisionware's LPT1 software for print release management and SMCCCD uses Wepa. At this time, Burlingame Public Library (BPL), Daly City Library (DCL), San Bruno Library (SBL), San Mateo Public Library (SMPL), South San Francisco Library (SSF) and all the SMCCCD libraries maintain their current policies for printing. Redwood City Library (RCL) has an item to eliminate printing fees currently pending with the Redwood City Council and, if approved, could be implemented in January 2024.

Methodology

Printing and copying statistics for the calendar years of 2019 – 2022 were collated and analyzed by PLAN. For the purposes of this study, a page was considered as one sheet of single- or double-sided printed letter-sized paper. The size of print jobs was defined as follows:

- Small: 1-10 pages
- Medium: 11-25 pages
- Large: 26-50 pages
- Extra-large: 51 pages or more

For the purposes of this study, information was gathered from all library jurisdictions, including those which have removed payments for printing and copying.

Envisionware Software Print Management

Printing

There are two ways to manage placing limits on printing using the LPT1 software: by print job and by session. In either scenario, once the page or time limit is reached, the patron is blocked from additional printing.

LPT1 allows for limiting the number of pages per print job. There is no way to implement a tiered payment model (e.g., first 20 pages free and a set cost per page after that). Patrons can execute as many print jobs as they like, allowing them to print more than the maximum number of pages per job. SMCL has implemented this type of print management at most of the branches and allows 20 pages per print job. When patrons want to print more pages, they can queue another job for the additional pages.

The second option limits pages per login session to a specified amount or have unlimited pages per session. When there is a set page limit, it gets reset if the patron signs out before the computer use limit is reached and signs back in to resume the same session. Patrons can use this method to print more than the maximum number of pages allowed per session. For example, the page limit could be set at 20 pages per session. If a patron logs out and back in every five minutes for a 2-hour limit and prints the maximum number of pages each time, they could print 480 pages. This workaround that allows patrons to bypass the page limit per session cannot be mitigated. SMCL has implemented this type of print management at the Foster City Library (FOS) and the San Carlos Library (SCL).

Patrons can use a free allocation from the library (within limits), cash, credit card or a combination of all three methods to pay for their print jobs. Currently, BPL and SMPL provide three free pages using an allocation account with LPT1 and the remaining jurisdictions that

charge for printing services (DCL, MPL, RCL, SBL and SSF) do not. Envisionware tracks payment type in seven categories based on the mode of the payment, some of which include cash and credit card payments; these have been combined into one category of “Multiple Types” for the purposes of this report (see **Appendix A** for definitions of payment types).

Copying

Copying is managed by using Envisionware’s Copy Payment Manager (CPM) software, by a third-party vendor whose services are engaged by the library outside of PLAN, or by the library staff. CPM is used by SMCL and SMPL; all other PLS library jurisdictions use either a third-party vendor for copy management or manage it in-house with library staff.

Payments for copies using CPM are managed using an allocation account. Libraries can opt to set an amount per copy job in the allocation account, which provides free copying at the set amount, and/or allow patrons to add their own funds to the allocation account. SMCL has set the free limit for the allocation account at \$0.02 per copy and a maximum of 22 copies per user per day.

The statistics from Envisionware for copying were prohibitively difficult to retrieve and analyze. Additionally, copying statistics were not available from some libraries that use a third-party or manage copying in-house. For these reasons, this report only includes statistics on printing.

Feedback on Free Printing from SMCL

	Pro	Con
Are there any patron behavior changes regarding printing?	Patrons are appreciative of the service The majority of branches have reported no disputes over patron monopolization of printing resources	It is not always clear to patrons what the printing limits are, they are sometimes displeased with the limits Increase in abandoned print jobs
What is the cost difference?	<i>*SMCL contracts with Pacific Office Automation for printer and copy supplies at a flat fee which has not increased.</i>	
		Increase in supply waste with printing more jobs Difficulty in keeping up with supply ordering due to increase in print jobs
Has staff time to manage printing increased?	No increase in staff time to manage printers at smaller branches	Increase in staff time at larger branches managing printers and refilling paper. A few branches reported more time explaining how to use Envisionware

Analysis of Printing Statistics

The most comparable years for statistical purposes are 2019 and 2022 since all the libraries were open their full hours and offered all their regular services. The volume of print jobs went down precipitously in 2020 as all PLS libraries were closed during the pandemic. Printing jobs increased slightly starting in 2021, when libraries began to resume open hours, and doubled in 2022 but have not yet reached the pre-pandemic volume, with the exception of SMCL. The majority of PLS public libraries printed 50% fewer jobs on average in 2022 when compared to 2019. SMCL has seen the reverse trend by implementing free printing in 2021 with 45% more print jobs in 2022 as compared to 2019.

All PLS libraries, with the exception of MPL (no longer using LPT1 to release print jobs) and SMCL (offering free printing), experienced roughly the same decrease of 50% in jobs that were small, medium, and large in 2022 compared with 2019. Extra-large jobs saw more variability at these jurisdictions, decreasing by a maximum of 48% at SMPL and reaching pre-pandemic amounts at SBL. Large and extra-large jobs virtually disappeared at SMCL with the implementation of free printing as patrons are now only allowed to print small or medium sized jobs. Both sized jobs saw increases in 2022 compared to 2019, which aligns with staff observations of patrons printing more jobs and seeing more abandoned jobs. It should be noted that the percentage of change for extra-large jobs at SSF appear skewed because the number of those jobs are so small, for example 0 in 2019 and 19 in 2022 for an increase of 1900% (see **Appendix B: Extra Large Job Size: Percent Change Year-to-Year**).

The method of payments saw only significant differences in credit card payments with 15% of the payments in 2019 increasing to 23% in 2022. Minor fluctuations in the other payment types accounted for the shift. SMCL's free printing is reflected as an absence of charges (hence the \$20k difference between 2019 and 2022), and not as an increase in the amount of free printing using the allocation accounts (see **Appendix B: Payment Types: Percentage in 2019 & 2022**).

See **Appendix B** for detailed comparison charts of the statistical data, including pages printed, jobs printed, relative job size and patron costs.

Recommendations

Circulation Managers anticipate significant barriers to implementing free printing as an initiative for all PLS libraries because the fees from printing and copying are tied to the City Master Fee Schedule at each jurisdiction. Changes to the Fee Schedule requires each city council to approve a change that would decrease income, however small, for the city. Some jurisdictions pay for printing and copying supplies out of the library budget on demand, as opposed to contracting for a flat fee which is easier to budget for. Some libraries may have

limited staffing and tradeoffs will need to be made to accommodate more staff time spent on managing printers and print jobs.

The Circulation Managers recognize that this is a valuable service to patrons and encourage individual jurisdictions to explore creative solutions to implement free printing. PLAN can explore alternative print and copy release software solutions on the market. Jurisdictions can also consider increasing allocation amounts and/or conducting a case study of local usage, materials/contract costs and staff time to compare with expected increase of print jobs.

Appendix A: Payment Types

Payment Type	Definition
Allocation Account	Pre-set amount allocated to patrons for free printing
Cash	Payments made by patrons in cash
Credit Card	Payments made by patrons with a credit card
Deposit Account	Account used by patrons to load money to charge against for print jobs; payments can be made by cash or credit card
Multiple Types	Payments made by patrons using cash, credit card or both
Override	Staff override to release print jobs for free
Vending Device	Payments made by patrons in cash at a vending machine

Appendix B: Printing Statistics

Volume of Pages Printed: Totals per Year

Jurisdiction	2019	2020	2021	2022	Grand Total
BPL	65,876	14,550	14,960	34,982	130,368
DCL	86,848	18,262	20,720	50,238	176,068
MPL*	25,073	5,118	294	1,970	32,455
RCL	65,887	13,573	15,290	29,586	124,336
SBL	38,448	7,233	7,736	16,918	70,335
SMCL	552,250	155,693	358,788	802,225	1,868,956
SMP	169,073	38,414	37,036	74,903	319,426
SSF	88,224	17,437	19,176	42,936	167,773
Grand Total	1,091,679	270,280	474,000	1,053,758	2,889,717
<i>*2021 & 2022 statistics unavailable for MPL Main</i>					

Volume of Pages Printed: Percent Change Year-to-Year

Jurisdiction	% Change 2019 to 2020	% Change 2020 to 2021	% Change 2021 to 2022	% Change 2019 to 2022
BPL	-77.91%	2.82%	133.84%	-46.90%
DCL	-78.97%	13.46%	142.46%	-42.15%
MPL*	-79.59%	-94.26%	570.07%	-92.14%
RCL	-79.40%	12.65%	93.50%	-55.10%
SBL	-81.19%	6.95%	118.69%	-56.00%
SMCL	-71.81%	130.45%	123.59%	45.26%
SMP	-77.28%	-3.59%	102.24%	-55.70%
SSF	-80.24%	9.97%	123.90%	-51.33%
<i>*2021 & 2022 statistics unavailable for MPL Main</i>				

Volume of Job Sizes: Totals per Year

Job Size Year	Jurisdiction								Grand Total
	BPL	DCL	MPL	RCL	SBL	SMCL	SMPL	SSF	
Extra Large	106	137	16	90	65	619	212	36	1,281
2019	50	55	13	43	25	382	106	0	674
2020	15	12	2	10	3	123	23	6	194
2021	11	20	0	9	8	82	28	11	169
2022	30	50	1	28	29	32	55	19	244
Large	284	422	56	277	170	2,007	736	168	4,120
2019	123	207	43	137	90	1,167	342	2	2,111
2020	35	32	12	39	20	371	91	36	636
2021	51	55	0	38	23	385	98	42	692
2022	75	128	1	63	37	84	205	88	681
Medium	1,342	2,065	335	1,430	808	37,182	3,383	1,167	47,712
2019	679	1,036	248	744	463	5,114	1,697	38	10,019
2020	161	225	51	173	66	1,962	444	227	3,309
2021	149	220	6	177	93	7,581	361	249	8,836
2022	353	584	30	336	186	22,525	881	653	25,548
Small	44,959	55,037	11,946	49,392	22,171	553,757	112,657	51,359	901,278
2019	23,405	27,469	9,279	28,776	12,182	191,171	61,734	27,983	381,999
2020	5,003	5,718	1,959	5,293	2,394	46,517	13,229	5,302	85,415
2021	4,447	6,595	90	5,138	2,275	92,938	13,446	5,517	130,446
2022	12,104	15,255	618	10,185	5,320	223,131	24,248	12,557	303,418
Grand Total	46,691	57,661	12,353	51,189	23,214	593,565	116,988	52,730	954,391

Small Job Size: Percent Change Year-to-Year

Jurisdiction	% Change 2019 to 2020	% Change 2020 to 2021	% Change 2021 to 2022	% Change 2019 to 2022
BPL	-78.62%	-11.11%	172.18%	-48.28%
DCL	-79.18%	15.34%	131.31%	-44.46%
MPL*	-78.89%	-95.41%	586.67%	-93.34%
RCL	-81.61%	-2.93%	98.23%	-64.61%
SBL	-80.35%	-4.97%	133.85%	-56.33%
SMCL	-75.67%	99.79%	140.09%	16.72%
SMPL	-78.57%	1.64%	80.34%	-60.72%
SSF	-81.05%	4.06%	127.61%	-55.13%
*2021 & 2022 statistics unavailable for MPL Main				

Medium Job Size: Percent Change Year-to-Year

Jurisdiction	% Change 2019 to 2020	% Change 2020 to 2021	% Change 2021 to 2022	% Change 2019 to 2022
BPL	-76.29%	-7.45%	136.91%	-48.01%
DCL	-78.28%	-2.22%	165.45%	-43.63%
MPL*	-79.44%	-88.24%	400.00%	-87.90%
RCL	-76.75%	2.31%	89.83%	-54.84%
SBL	-85.75%	40.91%	100.00%	-59.83%
SMCL	-61.63%	286.39%	197.12%	340.46%
SMPL	-73.84%	-18.69%	144.04%	-48.08%
SSF	497.37%	9.69%	162.25%	1618.42%
*2021 & 2022 statistics unavailable for MPL Main				

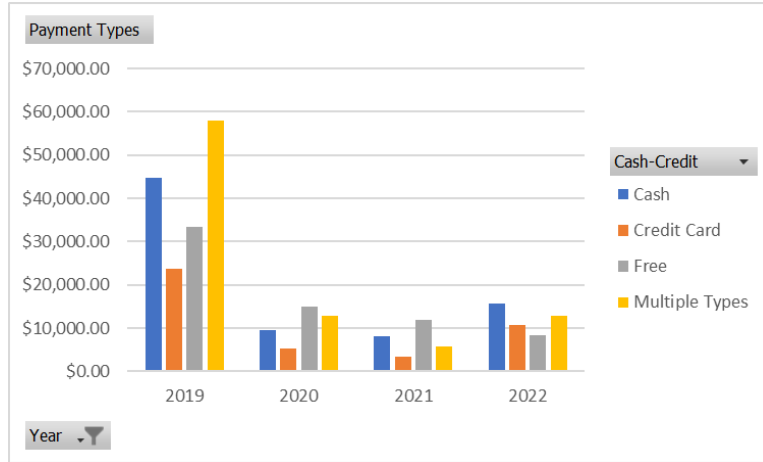
Large Job Size: Percent Change Year-to-Year

Jurisdiction	% Change 2019 to 2020	% Change 2020 to 2021	% Change 2021 to 2022	% Change 2019 to 2022
BPL	-71.54%	45.71%	47.06%	-39.02%
DCL	-84.54%	71.88%	132.73%	-38.16%
MPL*	-72.09%	-100.00%	100.00%	-97.67%
RCL	-71.53%	-2.56%	65.79%	-54.01%
SBL	-77.78%	15.00%	60.87%	-58.89%
SMCL	-68.21%	3.77%	-78.18%	-92.80%
SMPL	-73.39%	7.69%	109.18%	-40.06%
SSF	1700.00%	16.67%	109.52%	109.52%
*2021 & 2022 statistics unavailable for MPL Main				

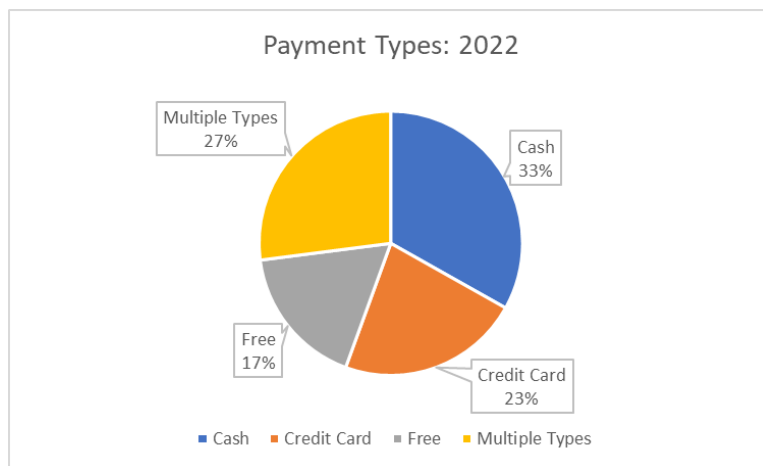
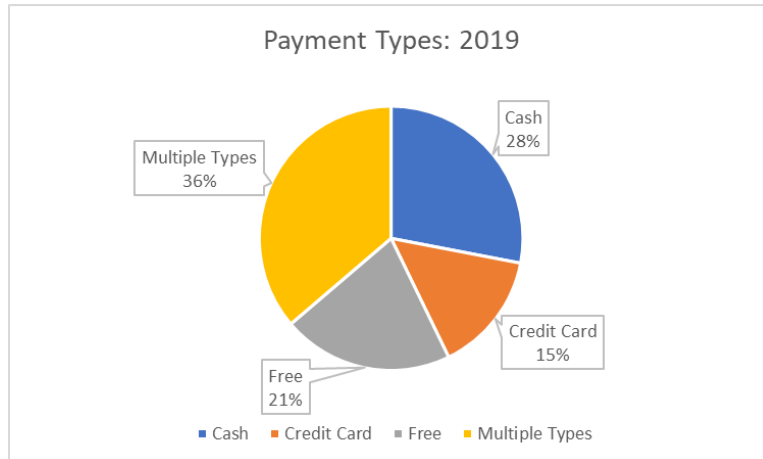
Extra Large Job Size: Percent Change Year-to-Year

Jurisdiction	% Change 2019 to 2020	% Change 2020 to 2021	% Change 2021 to 2022	% Change 2019 to 2022
BPL	-70.00%	-26.67%	172.73%	-40.00%
DCL	-78.18%	66.67%	150.00%	-9.09%
MPL*	-84.62%	-100.00%	100.00%	-92.31%
RCL	-76.74%	-10.00%	211.11%	-34.88%
SBL	-88.00%	166.67%	262.50%	16.00%
SMCL	-67.80%	-33.33%	-60.98%	-91.62%
SMPL	-78.30%	21.74%	96.43%	-48.11%
SSF	600.00%	83.33%	72.73%	1900.00%
*2021 & 2022 statistics unavailable for MPL Main				

Payment Types: Totals 2019-2022



Payment Types: Percentage in 2019 & 2022



To: PLS Executive Committee
From: PLAN
Subject: Comparison of Vega Discover and BiblioCore
Date: November 3, 2023

Background

In October 2021, PLAN presented a report to the PLS Administrative Council summarizing a survey of PLS library staff satisfaction with the current ILS and its related services and gauging interest in additional or replacement products and services. At that time, PLS library staff were satisfied with the ILS overall and there was significant interest in exploring products that would streamline library operations and provide added benefits to both patrons and staff.

Simultaneously, Innovative Interfaces, Inc. (III) released the Vega LX suite of software products designed to enhance the patron experience exploring the online catalog and engage patrons with library programs, services, and materials. PLAN arranged a demonstration of Vega Discover (discovery layer), Vega Program (library event and programming reservation module), and Vega Promote (email marketing tool) for all PLS staff on May 25, 2022. Formal feedback was gathered from this demo, and at that time, PLS staff thought that the products had merit but needed further development. Innovative offered PLS to be a development partner of the Vega Promote Web module (still in beta) to ensure the needs of a consortium were being met. It is worth noting that San Mateo County Libraries is using BiblioWeb for their website and all PLS public libraries are using BiblioCore as their discovery layer.

PLS has not developed any formal task force to review these items since the demos of Vega Program and Vega Promote were provided to PLS libraries. To date, no PLS library has yet chosen to adopt these products.

In the year that followed, enhancements and features were added to Vega Discover and more libraries throughout the United States are migrating to Vega Discover as the library's primary discovery layer. It has been confirmed that consortia are beginning to migrate to Vega Discover and the nearest consortium geographically to PLS using Vega Discover is Solano Partner Libraries and St. Helena (SPLASH). PLAN conducted an in-depth comparison of Vega Discover with and BiblioCommon's BiblioCore with three goals:

1. Determine if the features and functions of each product are competitive
2. Assess if one product exceeds the other in aesthetics and usability
3. Make a recommendation of possible next steps for further exploration

Methodology

PLAN designed a usability study based on similar ones recently conducted by the St. Louis County Library (SLCL), St. Louis Public Library (SLPL), and Mountain View Public Library (MVPL). SLCL and SLPL conducted a usability study in 2022 to identify areas of improvement within the two discovery layers currently in use. The environment of a shared ILS (Polaris) and using two discovery layers simultaneously

(SLCL uses Vega Discover and SLPL uses BiblioCore) made their study a good model for a similar analysis by PLAN. MVPL also conducted a study in 2022 to compare three discovery layers – Aspen, BiblioCore, and Vega. MVPL is a single-branch system and serves a smaller population than PLS, but it shares members of the communities of the Peninsula and South Bay who have high expectations of functionality and design in online tools.

Testing was conducted by comparing the functions, features, and top 10 search results of four libraries using BiblioCore (Central Arkansas Library System (CALs), San Francisco Public Library (SFPL), San Mateo Public Library (SMPL), and SLPL) and four libraries using Vega Discover (CALs, Rochester Hills Public Library (RHPL), Solano County Library (SCL), and SLCL). Full access to patron account services using Vega Discover was accomplished with a test patron account provided by Fauquier County Public Library (FCPL) and a test account was used at SMPL with BiblioCore. While none of the libraries are an exact match to PLS, they were selected because the most important characteristics – comparable service population, close geographical proximity, shared ILS, consortium organizational structure, and application of two discovery layers on one catalog – were shared by one or more libraries. For reference, the homepage and discovery layer websites for each library are noted **Appendix A**.

Testing focused on four major areas, concentrating on search result relevancy, usability, and aesthetics:

- Searching and browsing
- Patron account management
- Advanced features
- Layout and branding

The same actions were performed in each discovery layer, including keyword searches, patron account management tasks and an assessment of availability of advanced features. In comparing the search results and account management, special attention was paid to the ability of an average patron to intuitively navigate the discovery layer, relevancy of the search results and relative ease to accomplish a specific task. The PLAN Library Services Platform (LSP) Administrator was the only user in this study in order to experiment with the methodology. It should be noted that the tasks performed could not be as spontaneous as a typical library patron since the user is well versed in library terminology and advanced searching. If further exploration for these two discovery layers is warranted, refinements to the usability study will be made and applied to a larger test group of PLS staff and/or patrons.

A comprehensive comparison of features was generously provided by MVPL and is included in **Appendix B**. Detailed notes and hyperlinks to all the search results can be provided in an Excel file, upon request. Please note that the Aspen comparison is not included in the documentation for this study.

Results Summary

Searching & Browsing

In its primary function as a tool for searching a library catalog, BiblioCore out-performed Vega Discover overall. The top 10 search results in BiblioCore were generally more relevant than the same in Vega. Author searches produced more results by the author, as opposed to being *about* the author or their works, and the most popular titles appeared in the first page of results. Title searches in BiblioCore also produced more top results with either the exact title or all the keywords in the title. Vega did a better job with displaying results from a series search, always displaying titles in the primary series in the first set of results and putting the titles in the series in numerical order on the title details page. Results for topic searches were mixed with Vega returning many results but only a few more relevant ones than BiblioCore in the first page of results. A format search for “new DVDs” in BiblioCore yielded results released within the last year, while Vega had none, although many of the titles in BiblioCore were on order and libraries did not have copies in hand.

The reliance on BIBFRAME was evident in the terminology used in Vega to help patrons narrow their search or serendipitously discover new materials. “Concept” or “topic” was used instead of “subject,” “contributor” as a broader term which includes “author,” “editor” and “illustrator.” The typical patron will most likely understand the meaning of these alternative terms, but it is not part of the usual vernacular in most communities and may not be immediately understood by some patrons.

The BIBFRAME structure also enables Vega to help patrons discover materials related by topic and contributor. Vega enables the discovery of these related resources in a very user-friendly way and offers a large number of related resources – often into the thousands for generalized categories. BiblioCore relies on linked data and staff- and community-generated content to create connections for patrons to explore. This results in a more limited offering of related titles and subjects that are very closely related to the original title.

Patron Account Management

All the account management tasks can be intuitively found and were accomplished with relative ease in both BiblioCore and Vega. Finding availability of materials, logging into accounts, opting into reading history, paying fines, and updating the patron’s account information were all done with minimal clicks on both platforms. The terminology used to accomplish these tasks was easily understandable. The functions for patrons to manage their accounts were similar and easy enough on both discovery layers to make this aspect competitive and a matter of personal preference.

Advanced Features

All the advanced features were generally easy to find and use. eContent integrations, links out to programming, database access, hours and locations, and library services were comparable in both discovery layers. The list of discovery layer enhancements is nearly identical for BiblioCore and Vega Discover, with a few notable exceptions (see **Appendix B** for the complete list).

Some notable differences in functionality of the advanced features offered by BiblioCore and Vega were the patron- and staff-curated lists (called “Showcases” in Vega and “Bookshelves” in BiblioCore). BiblioCore makes it easy for patrons to manage Bookshelves of what they’ve completed, what they’re reading now and what they haven’t read yet with a more simplified and unified terminology for all three categories. Vega offers the exact same functionality but doesn’t label the categories in a linear fashion. Anecdotally, the LSP Administrator has received feedback from other Vega libraries that staff appreciate how easy it is to create, manage and post the Showcases on the library’s website or in digital marketing materials.

Layout & Branding

Overall, both discovery layers have a modern, clean look and feel. Search results are nicely spaced out on the page with filters and facets for narrowing the search on the left side of the page. Both platforms allow libraries to customize the navigation tabs and links at the top of the page. Vega appears sparser, especially on the front page if staff have not created any Showcases to display. It utilizes more white space and less library branded coloring throughout. Libraries can customize header element in Vega but not the footer, and RHPL is one example of more advanced customization since it implemented the Vega homepage design tool, which imports the header of the library’s website into the discovery layer for a more unified look and feel.

BiblioCore allows the library customization of the discovery layer’s header directly on the webpage (branded logo and colors) and footer (customizable links). The whitespace is intentionally placed on the left and right sides of the screens and the information is in the center of the screen. This gives the website the feeling of being balanced and the eye remains easily focused on the center of the screen.

Next Steps

The features, functions, and layout of BiblioCore and Vega are competitive (see **Appendix C** for a cost comparison). PLS has the potential for several options for next steps with regards to Vega Discover.

- Create a PLS focus group, which would include staff and the public, for feedback on desired features and potential testing.
- Continue to watch as the product develops and offer Innovative a list of features which might benefit the consortium.
- Ask Innovative for a ‘sandbox’ to experiment with the product.
- Migrate to the platform, taking into consideration that coordination would need to be made with San Mateo County Libraries regarding their website.
- Take no action and wait until the ILS comparison study is completed before a decision is made.

Coupling an email marketing tool and program registration module with a discovery layer would likely bring significant added value to PLS by streamlining workflows and reducing the number of the third-party vendors PLS libraries contract with for services. BiblioCore and III both offer a suite of products which PLS could adopt to accomplish these goals. The costs and benefits of a major implementation would require a thorough comparison of the competing marketing tools (BiblioEmail and Vega Promote)

and/or registration modules (BiblioEvents and Vega Program). It should be noted that the modular nature of these products means they can be purchased individually or in any combination with each other, regardless of platform. SMCL has already purchased BiblioEmail and will launch the first email to patrons in October 2023. A more comprehensive exploration by PLAN and the PLS committees would be worthwhile to find the best fit with PLS.

Appendix A: Library Websites & Discovery Layers

	Homepage	Catalog
Central Arkansas Library System		
	https://cals.org/	https://cals.bibliocommons.com/ https://carks.na.iiivega.com/
Fauquier County Public Library		
	https://fauquierlibrary.org/	https://fauqp.na.iiivega.com/
Rochester Hills Public Library		
	https://rhpl.org/	https://rhpl.na3.iiivega.com/
San Francisco Public Library		
	https://sfpl.org/	https://sfpl.bibliocommons.com/
San Mateo Public Library		
	https://www.cityofsanmateo.org/507/Library	https://smplibrary.bibliocommons.com/
Solano County Library		
	https://solanolibrary.com/	https://splash.na2.iiivega.com/
St. Louis County Library		
	https://www.slcl.org/	https://slouc.na2.iiivega.com/
St. Louis Public Library		
	https://www.slpl.org/	https://www.slpl.org/

Appendix B: Comparison of Features

Comparison of Features			
	BiblioCore	Vega Discover	Notable Impact
Customization	Limited	Limited	
Site layout	Not customizable	Not Customizable	
Ability to change relevancy ranking	No	No	
Priority in relevance ranking	Available items	Terms (number of appearances in field)	<i>*See Results Summary: Searching & Browsing</i>
Facets	Item & Title	Item & Title	
Groups all formats for a title	Yes	Yes	
Federated search	No; single search of multiple catalogs/databases	No; single search of multiple catalogs/databases	
Predictive search	Yes	Yes	
Search on Lexile	No	Yes	
Can choose not to display results for certain statuses like missing, billed, lost, and withdrawn	Yes	Yes	
Results include on order titles	Yes	Yes	
Saved searches	Yes	Yes	
Online library card registration	Yes	Yes	
Fines payment	Yes	Yes	
Link+ integration	Duplicate search on LINK+ website	Yes	<ul style="list-style-type: none"> • BiblioCore has a link that takes the patron to the Link+ catalog and automatically duplicates the search • Vega allows patrons to search the Link+ simultaneously with the local catalog
eBook integration	Yes	Yes	

Comparison of Features (cont.)			
	BiblioCommons	Vega Discover	Notable Impact
Updates last circulation date in patron record with eBook checkout	Yes	Yes	
NoveList (EBSCO Host) integration	Yes	On roadmap for development	<ul style="list-style-type: none"> BiblioCore displays related content from NoveList on the title detail page Release date of this feature in Vega is TBD
Integrates with LibCal	Possibly	No	
Integrates with StackMap	Yes	On roadmap for development	
Integrates with OverDrive	Yes	Yes	
Integrates with Hoopla	Yes	Yes	
Library events display	No	No	
Staff list creation	Yes	Yes	
Item tags	Yes	Yes	
Staff moderation of user content	Flagging report system	Managed by LibraryThing	
Customer engagement	<ul style="list-style-type: none"> Customer ratings & commentary (can be made private) Lists curated by BiblioCore, library staff & other libraries List carousels 	<ul style="list-style-type: none"> Lists curated library staff "Showcase" list display carousels & widgets 	Vega requires purchase of engagement model, Syndetics Unbound
Status and location updated	Real time	Real time	
Languages	Yes (price per language)	Yes (Spanish included)	
Separates genre from other LCSH headings	Yes	Yes	
Utilizes "see" and "see also" references	Yes	Yes	
Supports Unicode	Yes	Yes	
Non-roman characters	Yes	Yes	
Utilizes linked data	Yes	Yes	
Uses BIBFRAME	No	Yes	
Mobile app	Yes (extra)	Yes (extra)	
24/7 Support	Yes	Yes	

Comparison of Features (cont.)			
	BiblioCommons	Vega Discover	Notable Impact
Data breach	One in Aug. 2015: BiblioWeb - brute force attack through login page via a week user password	No	
Extra optional costs	<ul style="list-style-type: none"> • eBook upload • Content Café • NoveList • Additional modules <ul style="list-style-type: none"> ○ BiblioWeb ○ BiblioEmail ○ BiblioEvents ○ BiblioApp 	<ul style="list-style-type: none"> • Additional modules <ul style="list-style-type: none"> ○ Promote Web (beta) ○ Promote Program ○ Innovative Mobile 	

Appendix C: BiblioCore & Vega Discover Cost Comparison

BiblioCore (including BiblioFines)						
Amount to Be Distributed:			Subscription	Spanish	Chinese	Total
			\$89,338.66	\$5,685.19	\$4,873.02	
PLAN FORMULA FY 2022/23	Include in Estimate (Y/N)	Percentage	Cost Share	Cost Share	Cost Share	
Burlingame	Y	8.58%	\$7,666.65	\$487.88	\$418.18	\$8,572.71
Daly City	Y	6.08%	\$5,434.60	\$345.84	\$296.43	\$6,076.87
Menlo Park	Y	6.63%	\$5,926.52	\$377.14	\$323.27	\$6,626.93
Redwood City	Y	11.92%	\$10,648.42	\$677.63	\$580.82	\$11,906.87
San Bruno	Y	3.64%	\$3,251.23	\$206.90	\$177.34	\$3,635.47
San Mateo County	Y	42.12%	\$37,633.09	\$2,394.83	\$2,052.72	\$42,080.64
San Mateo Library	Y	13.24%	\$11,829.05	\$752.76	\$645.22	\$13,227.03
South San Francisco	Y	7.78%	\$6,949.10	\$442.22	\$379.04	\$7,770.36
Community College	N	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
Total PLS Cost		100.00%	\$89,338.66	\$5,685.20	\$4,873.02	\$99,896.88
SMCL pays \$44,000/year (approx.) for BiblioWeb						

Vega Discover						
Amount to Be Distributed:			Subscription	Spanish	Chinese	Total
			\$75,000.00	Included	TBD	
PLAN FORMULA FY 2022/23	Include in Estimate (Y/N)	Percentage	Cost Share	Included	Cost Share	
Burlingame	Y	8.58%	\$6,436.17		TBD	\$6,436.17
Daly City	Y	6.08%	\$4,562.36		TBD	\$4,562.36
Menlo Park	Y	6.63%	\$4,975.33		TBD	\$4,975.33
Redwood City	Y	11.92%	\$8,939.37		TBD	\$8,939.37
San Bruno	Y	3.64%	\$2,729.42		TBD	\$2,729.42
San Mateo County	Y	42.12%	\$31,593.06		TBD	\$31,593.06
San Mateo Library	Y	13.24%	\$9,930.51		TBD	\$9,930.51
South San Francisco	Y	7.78%	\$5,833.78		TBD	\$5,833.78
Community College	N	0.00%	\$0.00		TBD	\$0.00
Total PLS Cost		100.00%	\$75,000.00		TBD	\$75,000.00

Peninsula Library System

To: PLS Executive Committee
From: Carol Frost
Subject: Budget for PLS Shared OverDrive Collection
Date: November 3, 2023

Background

The PLS shared OverDrive budget was \$400,000 from FY 2015-16 to FY 2018-19. At the request of the eBook Purchasing Group, the Council approved a five-year OverDrive budget which included an additional \$50,000 annually, from \$425,000 in FY 2019-20, to \$625,000 in FY 2023-24.

At the August 2021 PLS Council meeting, the Council approved \$39,000 of annual funding for an eBook Chair to oversee the collection development and budget of the shared OverDrive collection. The funding comes from the OverDrive budget.

In the last several years, PLS has chosen to allocate the entire CLSA funds to augment the OverDrive collection. CLSA funds cannot be used to fund staff but can be used to support the collection. An average of \$63,589 of CLSA funds has been allocated annually.

The purpose of this memo is to discuss the future budget for the shared OverDrive collection, so that this information may be used in building future PLAN Central budgets.

Below is a chart with the current approved OverDrive budget divided by PLAN formula, including the CLSA allocations and eBook Chair costs.

	2019/20	2020/21	2021/22	2022/23	2023/24
Jurisdiction	\$425,000	\$475,000	\$525,000	\$575,000	\$625,000
Burlingame	\$32,615	\$43,279	\$43,448	\$47,585	\$51,723
Daly City	\$25,973	\$32,223	\$34,204	\$37,462	\$40,719
Menlo Park	\$30,076	\$38,243	\$35,368	\$38,736	\$42,105
Redwood City	\$55,796	\$68,334	\$61,203	\$67,031	\$72,860
San Bruno	\$16,051	\$20,233	\$23,152	\$25,357	\$27,562
San Mateo County	\$167,745	\$159,635	\$209,637	\$229,603	\$249,568
San Mateo Library	\$52,490	\$69,247	\$76,885	\$84,208	\$91,530
South San Francisco	\$30,206	\$43,627	\$41,103	\$45,018	\$48,932
Community College	\$14,047	\$0	\$0	\$0	\$0
TOTAL OverDrive	\$483,074	\$475,000	\$525,000	\$575,000	\$625,000
CLSA Allocation	\$58,074	\$62,850	\$61,586	\$71,847	
eBook Chair			\$12,000	\$12,000	\$39,000

Usage Data

The usage of the eCollections during the pandemic was high, and statistics seem to indicate that usage remains constant. Below is a summary of the data reported to date regarding usage:

	2019	2020	2021	2022	2023 (to Oct 24)
Total Checkouts	780,506	1,052,411	1,144,397	1,089,321	1,016,603
Unique Users	36,627	47,139	46,077	49,652	49,924
Holds	352,694	551,954	473,347	462,541	426,584
eBook checkouts (June)	40,877	69,674	59,355	51,613	56,813
eAudioBook Checkouts (June)	26,642	33,896	33,536	33,855	39,572

Additionally, since the implementation of the Reciprocal Leading Agreement, there were 24,2198 checkouts of PLS items by NorthNet and MARINet users, which does not allow holds and only allows checkouts on some titles. During the same time, there were 2,647 checkouts of NorthNet and MARINet items by PLS users.

PLS's average waiting time (for a hold to be filled) is around 47 days, fluctuating between 51 and 46 days over the past 6 months. An average of around 42,000 to 47,000 PLS users have 1 or more holds, at any specific time, over the past 6 months.

Costs for eMaterials range depending on the model (e.g., metered access, cost per circulation, simultaneous use, etc.), with increases over the last several years.

Various PLS Libraries have "Advantage" accounts in OverDrive in which they purchase titles (or copies) that only their patrons can use. Of those, 5 libraries currently share the locally purchased titles with all PLS users (after local holds have been filled and continue to have priority). Three libraries have Advantage Accounts, but either do not purchase titles or do not share purchased titles/copies with PLS users.

The PLS eBook Chair reports that the budget could be increased exponentially to try to address the needs.

OverDrive Allocation Options

Several options have been developed to consider for funding the shared collection. Included is a continuation of the current \$50,000 annual increase, a 5% increase, and a 3% increase.

Option 1: Continuation of \$50,000 annual increase

		2023/24	2024/25	2025/26	2026/27	2027/28
Jurisdiction	PLAN Formula FY23/24 adjusted*	\$625,000	\$675,000	\$725,000	\$775,000	\$825,000
Burlingame	8.28%	\$51,723	\$55,861	\$59,999	\$64,137	\$68,274
Daly City	6.52%	\$40,719	\$43,977	\$47,234	\$50,492	\$53,749
Menlo Park	6.74%	\$42,105	\$45,473	\$48,842	\$52,210	\$55,579
Redwood City	11.66%	\$72,860	\$78,689	\$84,518	\$90,346	\$96,175
San Bruno	4.41%	\$27,562	\$29,767	\$31,972	\$34,177	\$36,382
San Mateo County	39.95%	\$249,668	\$269,641	\$289,615	\$309,588	\$329,562
San Mateo Library	14.64%	\$91,530	\$98,852	\$106,175	\$113,497	\$120,820
South San Francisco	7.83%	\$48,932	\$52,847	\$56,761	\$60,676	\$64,590
Community Colleges	0.00%	\$0	\$0	\$0	\$0	\$0

*PLAN formula will change annually. This is an estimate using the adjusted FY 23/24 formula for all years.

Option 2: 5% Increase

		2023/24	2024/25	2025/26	2026/27	2027/28
Jurisdiction	PLAN Formula FY23/24 adjusted*	\$625,000	\$656,250	\$689,063	\$723,516	\$745,221
Burlingame	8.28%	\$51,723	\$54,309	\$57,025	\$59,876	\$61,672
Daly City	6.52%	\$40,719	\$42,755	\$44,893	\$47,137	\$48,551
Menlo Park	6.74%	\$42,105	\$44,210	\$46,421	\$48,742	\$50,204
Redwood City	11.66%	\$72,860	\$76,503	\$80,328	\$84,345	\$86,875
San Bruno	4.41%	\$27,562	\$28,940	\$30,387	\$31,906	\$32,864
San Mateo County	39.95%	\$249,668	\$262,151	\$275,259	\$289,022	\$297,693
San Mateo Library	14.64%	\$91,530	\$96,107	\$100,912	\$105,957	\$109,136
South San Francisco	7.83%	\$48,932	\$51,379	\$53,948	\$56,645	\$58,344
Community Colleges	0.00%	\$0	\$0	\$0	\$0	\$0

*PLAN formula will change annually. This is an estimate using the adjusted FY 23/24 formula for all years.

Option 3: 3% Increase

3% Increase		2023/24	2024/25	2025/26	2026/27	2027/28
Jurisdiction	PLAN Formula FY23/24 adjusted*	\$625,000	\$643,750	\$663,063	\$682,954	\$703,443
Burlingame	8.28%	\$51,723	\$53,275	\$54,873	\$56,519	\$58,215
Daly City	6.52%	\$40,719	\$41,941	\$43,199	\$44,495	\$45,830
Menlo Park	6.74%	\$42,105	\$43,368	\$44,669	\$46,009	\$47,390
Redwood City	11.66%	\$72,860	\$75,046	\$77,297	\$79,616	\$82,005
San Bruno	4.41%	\$27,562	\$28,389	\$29,241	\$30,118	\$31,021
San Mateo County	39.95%	\$249,668	\$257,158	\$264,873	\$272,819	\$281,004
San Mateo Library	14.64%	\$91,530	\$94,276	\$97,104	\$100,017	\$103,018
South San Francisco	7.83%	\$48,932	\$50,400	\$51,912	\$53,469	\$55,073
Community Colleges	0.00%	\$0	\$0	\$0	\$0	\$0

*PLAN formula will change annually. This is an estimate using the adjusted FY 23/24 formula for all years.

Recommendation

It is recommended that the PLS Executive Committee consider a funding formula for the next five years for the shared OverDrive collection and provide a recommendation to the PLS Administrative Council.

To: PLS Executive Committee
From: Carol Frost
Subject: PLP CLSA Allocation to PLS Libraries for FY 2023-24
Date: November 3, 2023

Background

Each year the Pacific Library Partnership (PLP) receives funds from the California Library Services Act (CLSA). These funds can be spent on public library activities related to Communications and Delivery. The PLP Executive Committee allocated \$345,442 of CLSA funds back to the public libraries per the PLP formula during its meeting on October 16, 2023. The menu of items which PLP libraries will be able to choose from has changed, based on a survey of members. The menu includes:

- OverDrive in a shared environment
- Bibliotheca's CloudLibrary Consortia product
- Link+
- Palace Project/eBooks for All
- Broadband hardware
- CENIC telecommunication costs, data center warranties
- Other approved collaborative projects

Discussion and Options for PLS Shared Use of CLSA Funds

PLS public libraries will receive the following distribution in FY 2023-24 (total \$70,762):

Burlingame Library	\$8,130	San Bruno Public Library	\$5,012
Daly City Public Library	\$6,051	San Mateo County Library	\$18,527
Menlo Park Public Library	\$5,012	San Mateo Public Library	\$9,170
		South San Francisco Public Library	
Redwood City Public Library	\$10,210	Library	\$8,650

PLS libraries may choose to receive their portion of the CLSA funds locally or to accept the funds as a consortium and allocate the funds towards identified projects. In either scenario the funds must be spent from choosing from the menu of choices indicated above.

Option 1: Allocate funds to support the shared PLS OverDrive Collection

In the last four years, PLS has chosen to allocate the funds towards OverDrive. For FY 2021-22 the \$61,850 of PLS CLSA funds were used to purchase the All Access Comics collection and to buy materials to support system-wide events such as YANovCon, San Mateo County Reads, Peninsula Libraries Comic Arts Fest, and the 80th Anniversary of Executive Order 9066. In FY 2022-23, \$71,042 of CLSA funds were allocated to support the increase of Blackstone audiobooks; purchase of Tandor Media simultaneous use audiobooks; and adding additional

world language content with a focus on children's materials in Russian, Ukrainian, French, and Tagalog.

The FY 2023-24 approved PLS budget includes \$625,000 for the OverDrive shared collection.

Should PLS choose to allocate the FY 2023-24 funds to the shared OverDrive collection, the eBook Chair has indicated that the funds could be used to supplement the following:

- 1. One-time expansion of language materials.** PLS could purchase approximately \$2,000 per language (based on available titles) of copies that will not expire, in languages other than English, Spanish, Chinese (budgeted languages with assigned selectors). This could include ESL or language learning titles, in addition to titles in the native languages. Based on the 2020 Census for San Mateo County, there are approximately 26 additional languages (beyond English, Spanish and Chinese) with 686 or more residents speaking each language. PLS's OverDrive collection has 30 or more titles in 5 of those languages. After these titles have been purchased, the PLS Marketing Team and individual jurisdictions could promote the availability of these language titles.
- 2. Focus on Repurchasing Expired Titles (Meter Access) which have holds.** This one-time expenditure would help reduce the current 47-day average wait time for patrons, but the titles would once again expire - usually after 26 checkouts or 24 months. As of September 2023, there are 903 titles which expired from the consortia collection which have holds. An allocation of \$40,660 would repurchase the titles and resume filling the 1,547 current holds. Titles regularly expire, and some are repurchased, but there are not enough funds for all titles with holds. The priority for repurchasing typically goes to those with the most holds.
- 3. Reduce Wait time for Holds.** Additional funds could be used to help reduce the current wait time of 47 days. For example, there are 870 titles with a holds ratio above 5 (more than 5 holds per copy), which equates to at least 2,084 copies to lower the ratio to 5, costing about \$132,000. PLS is on track to have a similar number of holds in the past 12 months as there were 3 years ago during the height of COVID closures - with 497,565 holds between October 2022 and September 2023, compared with 512,400 holds between October 2019 and September 2020.

Option 2: Allocate funds to support the networking switch replacement project

In FY 2024-25, all network switches at the libraries will be replaced (with a seven-year replacement cycle), as well as the indoor WiFi access points. PLS intends to apply for a broadband grant for the purchase of the WiFi access points.

The network switches would be eligible for use of CLSA funds for replacement. Once PLS receives its CLSA funds, it has three years to expend the funds. Below is a chart which lists the estimated cost per library for switches, and the FY 2023-24 CLSA distribution. It could also be possible to apply the FY 2024-25 CLSA distribution to this project.

The estimated cost per switch is \$5,000. The actual cost may vary once the project begins.

Library Jurisdictions	FY 24-25 Network Switches Estimated Cost (\$5,000/unit)		FY 23-24 CLSA Allocation	Percentage of Cost
	Quantity	Total Cost		
Burlingame	7	\$35,000	\$8,130	23.23%
Daly City	7	\$35,000	\$6,051	17.29%
Menlo Park	5	\$25,000	\$5,012	20.05%
Redwood City	17	\$85,000	\$10,210	12.01%
San Bruno	2	\$10,000	\$5,012	50.12%
San Mateo County	44	\$220,000	\$18,527	8.42%
San Mateo Public	3	\$15,000	\$9,170	61.13%
South San Francisco	2	\$10,000	\$8,650	86.50%
Total PLS cost	87	\$435,000	\$70,762	

Recommendation

It is recommended that the PLS Executive Committee determine how to allocate the \$70,762 of FY 2023-24 CLSA funds for PLS and recommend approval by the PLS Administrative Council.