

# PLS CIRCULATION MANAGERS MEETING

## AGENDA

February 15, 2024, 2:00-4:30 pm

Hybrid Meeting - BPL Upper Level Meeting Room

### Join Zoom Meeting

Meeting ID: 870 4605 9921

Passcode: 925944

<https://us02web.zoom.us/j/87046059921?pwd=aUlwcTc1L2p4VEgzTWppUmVWZi9nUT09>

Facilitator: Natalie Juhl, DCL

Recorder: Raquel Metcalfe, SBL

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
  - a. Minutes from special meeting – February 1, 2024
  - b. 01.08 Staff Guidelines for Personal Use of Library Materials (pg 7)- RCL
  - c. 02.01 Check-outs and Check-ins (pg 8) – RCL
  - d. 05.08 Creating New Holds Paging Lists (pg 9) – RCL
  - e. 01.04 PLS Agency Codes (pgs 10-12) - RCL
- III. PLAN Items
  - a. PLS Delivery Report
  - b. PLAN Report (pg 13)
- IV. Action Items
  - a. Update regarding Unique – subcommittee
  - b. Create a notice for Expiring Holds (pg 14) – RCL
  - c. Circ manual: just edit or bring to the Circ Managers?- RCL
- V. Informational Items
  - a. Adding accent marks to patron records demo– RCL
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
- VII. Agenda Building
  - a. Update notice text for bills and Statement of Charges – subcommittee
  - b. Allocation of adding more review files – PLAN
- VIII. Announcements

- IX. Public comments: 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 Circulation Managers from discussing or acting on any matter not on the agenda pursuant to state law.

**Brown Act 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)."

Next Meeting: March 21, 2024  
Recorder: SMCCCD

Next Admin Council Meeting: April 11, 2024

Recorder:

RCL - January 2024

SBL - February 2024

SMCCCD - March 2024

SMCL - April 2024

SMP - May 2024

SSF - June 2024

BPL - July 2024

MPL - August 2024

RCL - September 2024

SBL - October 2024

SMCCCD - November 2024

SMCL - December 2024

**PLS CIRCULATION MANAGERS SPECIAL MEETING  
MINUTES**

**February 1, 2024, 11:00 am-12:00 pm**

**Join Zoom Meeting**

Meeting ID: 816 8279 9451

Passcode: 694683

<https://us02web.zoom.us/j/81682799451?pwd=WUpITFdmY1VBYTBaN1pDT1NnaFhVZz09>

Facilitator: Natalie Juhl, DCL

Recorder: Raquel Metcalfe, SBL

Present: Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Homer Martinez (RCL), Raquel Metcalfe (SBL), Lori Lisowski (SMCCCD), Ginny Mies (SMCL), Jon Jung (SMPL), Brian Malibiran (SSF)

Guests: Vanessa Walden (PLAN), Farrukh Farid (PLAN), Daniel Kith (PLS), Sandy Wee (SMCL)

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
  - a. Minutes from meeting – January 18, 2024  
Update minutes to add possible 2<sup>nd</sup> notice to 150 days under action item A in January 18<sup>th</sup> meeting. Update file name to remove the word DRAFT – MSP: BPL/SMCL
- III. PLAN Items
  - a. PLS Delivery Report – Following up, IRS Tax forms holding until Monday, Feb 5<sup>th</sup>, if not claimed given to other libraries.
  - b. PLAN Report – Nothing to report
- IV. Action Items
  - a. Proposed change to Circulation Manual Section 02.07.02A – SMCL
  - b. 02.07.02 New Code Request – SMCL Approve new codes created at this meeting, not the codes that were submitted. MSP: SBL/RCL  
Library vending machine at SNZ library. Patrons can pick up holds and have limited collection. One for now but wanting to open more in the future.  
z= location at Sanchez library.
  - c. Hold pickup location proposed to be 0z not 1zo for the Outpost at Sanchez Library. – MSP: RCL/MPL

Suggestion to use 0z instead of 1z. Wanting to add Large-Type (0zalt), Picture Books (0zjpc), Board Books (0zjtd), New Adult Fic (0za9f), New Adult NF (0za9n), New J Fic (0zj9f), New J GN 0zj9g), New In-Luck (0za1f), Adult DVD (0zadv)

- d. Mail out as a holds pick-up location in Sierra – SMCL
  - i. Location Code Request – East Palo Alto Mail Out (1x)  
EPA has been closed, offered to mail out holds to patrons and do not want to stop service. Want to create a pickup location in Sierra for mail out service. Submitted location request as 1x, holds will arrive to Central and then mailed out from there. Anybody can request for now.  
Suggesting to use 1g instead of 1x to not confuse with electronics. SMCL will change code to 1g – MSP: SSF/BPL

V. Informational Items

- a. Location needed for April 18, 2024 meeting – DCL  
BPL not available for April and October meetings. Ginny will look into having meetings at Central. If not able meeting will be held via Zoom.

VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)

VII. Agenda Building

- a. Update notice text for bills and Statement of Charges – subcommittee
- b. Create a notice for Expiring Holds – RCL
- c. Adding more review files Feb 2024 – PLAN
- d. Adding accent marks to patron records (Informational Item) – RCL
- e. Add additional home library codes in use – RCL
- f. Circ manual: just edit or bring to the Circ Managers?- RCL

VIII. Announcements

- IX. Public comments: 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 Circulation Managers from discussing or acting on any matter not on the agenda pursuant to state law.

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Next Meeting: February 15, 2024  
Recorder: SBL

Next Admin Council Meeting: February 1, 2024

Recorder Schedule:  
RCL - January 2024  
SBL - February 2024  
SMCCCD - March 2024  
SMCL - April 2024  
SMP - May 2024  
SSF - June 2024  
BPL - July 2024  
MPL - August 2024  
RCL - September 2024  
SBL - October 2024  
SMCCCD - November 2024  
SMCL - December 2024

## 01.08 Staff Guidelines for Personal Use of Library Materials (Revised 1/23/24) Draft

- All items taken from the library site are to be checked out.
- All items are to be checked out for the normal loan periods.
- Observe the 50 item limit and any applicable material type limits for personal use
- Renewing items is permissible. If the item has a hold, do not renew it. Return it as soon as possible.
- Observe renewal limits for other libraries' items.
- Staff members should have no more than one personal card (not excluding internal cards for work purposes).
- Staff members **must** use their personal library card to place holds. Internal library cards are not to be used for personal use.
- Staff members **must** place holds using the on-line catalog, not the ILS.
- Staff members are not to shuffle the holds queue to obtain personal holds more quickly.
- Staff members are not to check out an item for which they have not placed a hold and which is on hold for a patron.
- Staff should never apply special due dating to extend the normal loan period of another library's item.
- Staff should not borrow, for their own or customer use, materials which should be "in transit" to or from another PLS library.
- Items that have been billed for replacement must be returned or paid for as soon as possible.
- Items are not to be checked in until they are actually returned.
- Any special in-house borrowing policies (e.g. vacation loan periods or renewal overrides) may not be applied to items from another library jurisdiction.
- Library guidelines must be followed when waiving any fines or fees. Fines and fees are not waived for friends or family.
- Staff abusing borrowing privileges may be subject to jurisdictional discipline.

## **02.01 Check-outs and Check-ins (revised 1/20/24) draft**

### **Check-outs**

The total checkout limit is 50 items. For details on loan periods and overdue fines, see section 02.04 Circulation Decisions PLS Table of Loan Periods and Fines.

Staff members should have no more than one personal card to borrow library material. This does not exclude internal cards for work purposes. See section 01.08 Staff Guidelines for Personal Use of Library Materials for more details.

### **Check-ins**

Patrons may return any PLS items to any PLS library in the system.

### **Auto Check-in (currently turned off)**

Items checked in at the non-owning library are set to In Transit status and sent through the PLS delivery to the home library. At the January 20, 2022 PLS Circulation Managers meeting, we agreed to turn off the automatic check-in feature. Libraries are using Tote Check-In or the AMH to check-in/pre-sort the PLS deliveries. In addition, due to staff shortages, the PLS deliveries may need to cancel a delivery route.

The automatic check-in feature was originally set to 120 hours. After 120 hours, the ILS automatically sets the status of the item to Check Shelf (or Recently Returned in the online catalog). The item then stays in the Recently Returned status in the online catalog for 24 hours at which time it is automatically set to CHECK SHELF status.



## 05.08 Creating New Hold Paging Lists (rev. 2/3/24) draft

These instructions are used to create new Item-Level or Bib-Level paging lists when a new branch location is opened or if an existing paging list has been accidentally deleted. Some libraries are using Print Templates to print their paging pull lists. Print Templates will require changing some printer setting. Contact PLAN staff first for assistance if your library needs to change to Print Templates. This is part of the NOTICES section of Sierra.

1. Log in to Sierra
2. Select **NOTICES** from the drop down menu
3. Select a job (Item Page List or Bib Page List) that closely matches the new paging list.
4. Click on **EDIT**
5. In the box that shows **Locations Served**, select your library from the drop down menu.
6. ***Extremely important*** – Click on the SAVE AS button so you do not delete or change the existing list.
7. Select the local printer where the list will print. You will need to do this twice.
8. In the dialog box that opens **SAVE JOB AS**, input the name of the new list. Use the following format:  
Library Initials Branch Name Report Name
9. Select **OK** to create the new report.

#### 01.04 PLS Agency Codes (rev. 2/1/24) draft

Each library and each jurisdiction has a three-letter code used to identify items sent In Transit between libraries and to identify a library where an action is initiated or occurs. In addition, each library has a two-digit prefix, combining numbers and letters, used in the ILS to identify an item's location. This prefix relates to the 5<sup>th</sup> digit in the barcode, except for the colleges. The location code allows for gathering statistics, and in conjunction with ITYPES and PTYPES, to determine Loan Rules for circulation.

Jurisdiction/Library	Code	Barcode	Sierra Location
<b>San Mateo County</b>	SMCO	29041 or 29731	1
Atherton	ATH		1a
Belmont	BEL		1b
Bookmobile	BKM		0k
Brisbane	BRI		1r
County Central	CCO		1c
East Palo Alto	EPA		1e
Foster City	FOS		1f
Half Moon Bay	HMB		1h
Milbrae	MIL		1m
North Fair Oaks	NFO		1n
Pacifica	PAC		1p
Portola Valley	PVL		1v
San Carlos	SCL		1s
Sanchez	SNZ		1z
Woodside	WDS		1w
<b>Burlingame Libraries</b>		29042	
Burlingame	BPL		2b
Easton	EAS		2e
<b>Daly City Libraries</b>		29043	

Bayshore	BAY		3b
John Daly	JDD		3j
Serramonte	SRM		3s
Westlake	WST		3w
<b>Menlo Park Libraries</b>		29044	
Menlo Park	MPL		4m
Belle Haven	MPB		4b
<b>Redwood City Libraries</b>		29045 or 29735	
Redwood City	RCL		5r
Redwood Shores	RSH		5h
Schaberg	SHB		5s
<b>San Bruno Library</b>		29046	
San Bruno	SBL		6s
<b>San Mateo City Libraries</b>		29047	
San Mateo Public	SMP		7s
Hillsdale	HIL		7h
Marina	MAR		7m
<b>South San Francisco Libraries</b>		29048	
South San Francisco	SSF		8s
Grand	GRA		8g

**San Mateo County Community Colleges** (community college libraries are no longer issuing physical library cards)

Canada	CAN	29366	ca
College of San Mateo	CSM	29367	cm
Skyline	SKY	29368	cy

**Additional agency codes**

Jurisdiction/Library	Code	Use
<b>San Mateo County</b>	1q	floating collection
East Palo Alto	1g	hold pick up location for mailing holds
Sanchez	0z	hold pick up location and location codes for Outpost. Also, a statistical group number is assigned for statistical purposes
<b>Menlo Park Library</b>	4g	hold pick up location for mailing holds

## PLAN Report

PLS Circulation Managers Committee: February 15, 2024

### 1. New Ticketing System for PLAN

PLAN is working on the implementation of a new helpdesk ticketing system to replace the outdated one we currently use. The vendor is FreshService (same as SMCL & SMCCCD). PLS staff and the IT Group have been on-boarded first as a pilot group. PLAN is working through the feedback received from the pilot group to refine the workflows before rolling it out to all PLS library staff in spring 2024.

### 2. Inserting Accent Marks in Patron Records

PLAN will provide a demonstration of this procedure live at the Circulation Managers meeting.

Follow these instructions AFTER the patron record has been created

- Go to **Tools – Character Map** and select Code Chart **Latin-1 Supplement**
- Select the diacritic character and press **CTRL-C** to copy it to your clipboard
- Open the patron record in edit mode, insert the cursor where you want the diacritic character to appear and press **CTRL-V** to paste it

### 3. Sierra Upgrade to Version 6.1

PLAN will schedule a software upgrade to Sierra 6.1 in March 2021. This version of Sierra is required to implement LX Starter email notices, which should be released by III by the end of March 2024. The complete set of release notes, resolved issues and known are posted on FIDO. Notable enhancements in Sierra 6.1 include:

- The last status update date field will be added to Create Lists to allow library staff to search for records using this field, and to list, sort, and export data using this field.
- Library staff members who use Global Update will see updated options in the File menu to make it easier to select either "Load" or "Save" actions and new pop-up messages to confirm the correct command file is being saved.

### 4. IT Director Recruitment

PLS is recruiting for a new IT Director (<https://plsinfo.org/employment/>). Please forward job announcement to anyone interested in applying.

32 West 25<sup>th</sup> Avenue, Suite 201, San Mateo, CA 94403 T: 650-349-5538 F: 650-349-5089

## New Notice

**Expiring Holds** (email only) (Is this notice added to the Text of Circulation Notices in Sierra. Does it need to be numbered? Do we need to update Loan Rules to implement this loan rule?)

\*\*\*\* Expiring Hold Notice \*\*\*\*

Your request for this item(s) will be expiring in 60 days. If you would like to extend the expiration date, please contact your local library. For assistance, please email us at [jurisdiction@plsinfo.org](mailto:jurisdiction@plsinfo.org) [or/,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.