

PLS CIRCULATION MANAGERS MEETING

AGENDA

March 21, 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: Lori Lisowski, SMCCCD

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
 - a. Minutes from meeting – February 15, 2024
 - b. New Code Request **4myrf 4byrf** (pg 8-9)– MPL
 - c. New Code Request **8savg** (pg 10-11) – SSF
 - d. New Code Request **3byvg 3jyvg 3syvg 3wyvg** (pg 12) – DCL
 - e. New Code Request **3baga 3jaga 3saga 3waga** (pg 13) – DCL
 - f. New Code Request **3bjtb 3jbtb 3sjtb 3wjtb** (pg 14) – DCL
 - g. New Code Request **3balg 3jalg 3salg 3walg** (pg 15) – DCL
- III. PLAN Items
 - a. PLS Delivery Report
 - b. PLAN Report
- IV. Action Items
 - a. Update regarding Materials Recovery - subcommittee
 - i. Update notice text for bills and Statement of Charges (pg 16-17)
 - ii. Circ Manual update: Remove patron message A (Check Address); only use MBLOCK A (Check Address)
 - iii. One-time update: when MBLOCK = C is removed & if PMESSAGE = A --> change MBLOCK to A
 - iv. PLAN will globally update zip code to 99999 for records with bad addresses AND PMESSAGE = A or MBLOCK = A

- b. Allocation of adding more review files (pg 18) - PLAN
- c. Sanchez Outpost days closed schedule – PLAN
- d. Held Item Delivery loan rules - PLAN
- V. Informational Items
 - a. Staff reminder to update zip code for bad address to 99999 - PLAN
 - b. Update i-Tiva phone notifications (free option to have PLS staff record prompts) _ PLAN
 - c. Location for April meeting - DCL
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
- VII. Agenda Building
- 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: April 18, 2024

Recorder: SMCL

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 MEETING

MINUTES

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

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

Present: Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Homer Martinez (RCL), Raquel Metcalfe (SBL), Lori Lisowski (SMCCCD), Stevie Norman (SSF)

Guests: Vanessa Walden (PLAN), Justin Wasterlain (PLS)

Absent: Ginny Mies (SMCL), Jon Jung (SMPL),

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item) MSP: BPL/RCL
 - a. Minutes from special meeting – February 1, 2024 -Update action item A to show that it was withdrawn.
 - 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 – Daniel will be out for next 2 weeks. Please send emails to Daniel and cc Justin Wasterlain. Justin will send out Marco Law's email as another contact.
 - b. PLAN Report – Checking in - Any questions re: ticketing plan?
Will be able to place a priority on the ticket and re-open the tickets. You will be able to see other staff members open tickets.
Accent marks – unable to place accent marks while you enter patron info. Vanessa showed circ managers how to use the Character Map in Sierra. Another option is to copy and paste accent marks from a word document.

Upgrade to Sierra 6.1 sometime in March 2024. Will need to add 6.1 to implement new email notices.

Recruiting for new IT Director.

EPA is re-opening Tues, Feb 20, 2024. Mail out services will continue.

Two pick up locations: EPA and EPA Mailout. Will go to Central then items will be mailed out. New function will be in place called **Held Item Delivery**; it will enable the ability to choose which items are available for delivery according to their loan rules. This will require a change in loan rules so that libraries are able to limit what items in their collections will be available to be mailed out.

Sanchez Outpost, Library Vending Machine. Construction is planned to start in the next couple of weeks. House a small browsable collection.

Non-holdable items. Can pick up holds. Items can be checked-out 24/7.

PLAN will update all patron notices to show Account # before the Patron ID Number.

IV. Action Items

- a. Update regarding Unique – subcommittee. PLS Council approved to move one with discontinuing with Unique. And increase block to \$50.
- b. Create a notice for Expiring Holds (pg 13) – RCL
Will need to create a script and notices via email only. Will be translated in Spanish and Chinese. Excludes frozen holds. MSP: BPL/MPL
- c. Circ manual: just edit or bring to the Circ Managers? – RCL
Homer would like to remove all info regarding Unique. Major changes will still be brought to the Circ Managers for approval. MSP: SBL/SMPL

V. Informational Items

DCL: Do any libraries circulate Hot Spots with 5G – SMPL circulates some 5G Hot Spots; MPL all Hot Spots are 5G.

Vanessa will be on vacation next week. Someone else will taking care of help desk tickets. The RFP for the new mobile app has been published. Timeline is vendor have until 3/6/24 to submit questions then PLS has 3/11/24 to post answers, proposals due 3/18/24. Demos will be the week of 4/8/24. April 19 will be the selection date.

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
- c. Sanchez Outpost days closed schedule – PLAN
- d. Held Item Delivery loan rules - PLAN

VIII. Announcements

MPL- new librarian starting end of month. Keys for new library will be given early March but have no date for grand opening.

SMPL – Lib Foun planning a week long host of events for National Library Week in April. In the library and around the city. Different activities and events with speakers.

- 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:

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Next Meeting: March 21, 2024
Recorder: SMCCCD

Next Admin Council Meeting: April 11, 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

02.07.02 New Code Request Form (rev. 8/3/23)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: 3/5/2024

Requesting Library: Menlo Park

Requestor's email: elmercer@menlopark.gov

- A. Location Code
- B. Patron Type
- C. Item Type
- D. Loan Rule
- E. Patron Code 2

(See section 02.07.02A New Code Request Instructions for detailed information on how to properly format a new code)

Proposed New Code: 4myrf ; 4byrf

Item Location Label for the Proposed New Code (100-character length max):

4myrf: Menlo Park – Main Young Adult Reference

4byrf: Menlo Park – Belle Haven Young Adult Reference

Give detailed answers to the questions for the proposed new code:

A. Location codes: To what library and collection does this item belong? **MPL** Is this a new location code? **Yes** Why is it different from the location codes your library already uses? **Creates new Reference collection in the Teen Zone at MPL and BHL.** If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

02.07.02 New Code Request Form (rev. 8/3/23)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: 03/08/2024

Requesting Library: SSF Main Library

Requestor's email: malibiranb@plsinfo.org

-
- A. Location Code
 - B. Patron Type
 - C. Item Type
 - D. Loan Rule

- E. Patron Code 2

(See section 02.07.02A New Code Request Instructions for detailed information on how to properly format a new code)

Proposed New Code: 8savg

Item Location Label for the Proposed New Code (100-character length max):

South San Francisco – Main 3rd FI Video Games

Give detailed answers to the questions for the proposed new code:

A. Location codes: To what library and collection does this item belong? **This will belong at the SSF Main Library.** Is this a new location code? **Yes.** Why is it different from the location codes your library already uses? **This will go on the 3rd floor, and not the 2nd floor.** If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.) **NA**

02.072 New Code Request Form (rev. 9/25/17)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: March 15, 2024

Requesting Library: Daly City

Requestor's email: juhl@plsinfo.org rees@plsinfo.org

✓ A. Location Code

Proposed New Code: 3byvg Daly City – Bayshore – Young Adult Video Games

3jyvg Daly City – John Daly – Young Adult Video Games

3syvg Daly City – Serramonte – Young Adult Video Games

3jyvg Daly City – Westlake – Young Adult Video Games

Review the corresponding section below for formatting new codes

Explain the proposed new code:

- A. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. See section III for formatting. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)
[The new codes would be used to add a video game collection, which may include Nintendo Switch cartridges, or other similar items. They will check out for 3 weeks, 0 renewals, 0 holds.](#)

02.072 New Code Request Form (rev. 9/25/17)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: March 15, 2024

Requesting Library: Daly City

Requestor's email: juhl@plsinfo.org rees@plsinfo.org

✓ A. Location Code

Proposed New Code: 3baga Daly City – Bayshore – Games

3jaga Daly City – John Daly – Games

3saga Daly City – Serramonte – Games

3jaga Daly City – Westlake – Games

Review the corresponding section below for formatting new codes

Explain the proposed new code:

- B. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. See section III for formatting. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

The new codes would be used to add a gaming collection, which may include board games, puzzles and other similar items. They will check out for 3 weeks, 5 renewals, 0 holds.

02.072 New Code Request Form (rev. 9/25/17)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: March 15, 2024

Requesting Library: Daly City

Requestor's email: juhl@plsinfo.org rees@plsinfo.org

✓ A. Location Code

Proposed New Code: 3bjtb Daly City – Bayshore – Talking Books

3jjtb Daly City – John Daly – Talking Books

3sjtb Daly City – Serramonte – Talking Books

3jtb Daly City – Westlake – Talking Books

Review the corresponding section below for formatting new codes

Explain the proposed new code:

- C. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. See section III for formatting. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

[The new codes would be used to add a new talking book collection, initially with Vox Books. They will check out for 3 weeks, 5 renewals, holds.](#)

02.072 New Code Request Form (rev. 9/25/17)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: March 15, 2024

Requesting Library: Daly City

Requestor's email: juhl@plsinfo.org rees@plsinfo.org

✓ A. Location Code

Proposed New Code: 3balg Daly City – Bayshore – Library of Things

3jalg Daly City – John Daly – Library of Things

3salg Daly City – Serramonte – Library of Things

3jalg Daly City – Westlake – Library of Things

Review the corresponding section below for formatting new codes

Explain the proposed new code:

- D. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. See section III for formatting. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

The new codes would be used for various non-library traditional items that otherwise do not have a specific location code and can be borrowed for home use. It is possible that they will check out for 3 weeks, 0 renewals, 0 holds.

Statement of Charges Notice Cycle

- Statements of Charges will only be sent via mail.
- Statements of Charges at 60 days and 150 days overdue will be compiled monthly on the first Monday of each month. Notices will be sent on the first Monday, except for PLS holidays when notices will be sent on the following Tuesday.
- The Statement of Charges will only be sent to patrons who have checkouts or charges that go 60 or 150 days overdue in the previous month. For example, Statements sent in February will be sent to patrons whose checkouts go 60 days overdue during the month of January.
- The first run of Statements of Charges in July 2024 will be inclusive of patrons who have checkouts or charges that go 60 or 150 days overdue in the previous two months (May and June 2024).
- Patrons will be sent either a 60-day notice or a 150-day notice in the same month, whichever is later, not both.
- Patrons may receive Statements of charges in multiple months if they have checkouts or charges that have different due or assessed dates. For example, if a patron has Billed Item A 60 days overdue in January and Billed Item B 60 days overdue in February, the patron will receive two separate 60-day notices in February (for Billed item A) and March (for Billed Item B).

Statement of Charges (60 days) Criteria:

- At least one billed item or one manual charge at least 60 days overdue AND
- Patron owes \$50.01 or more, including manual charges

Item(s) on your account is(are) long overdue and is(are) billed to your account. To resume borrowing privileges and ensure materials are available for other patrons, please return the billed item(s) to any library in San Mateo County. Libraries no longer charge overdue fines.

If you have any questions regarding the billed item(s), please contact your local library first before paying the fees. Your library's contact information is on the reverse side of this notice. The total amount due may include charges not listed below.

To pay online for lost items, visit <https://plsinfo.org/>. Click on "My Account," select your library and log into your account.

Statement of Charges (150 days)

Criteria:

- At least one billed item or one manual charge at least 150 days overdue AND

- Patron owes \$50.01 or more, including manual charges

Item(s) on your account is(are) now over 150 days overdue and is(are) billed to your account. To resume borrowing privileges and ensure materials are available for other patrons, please return the library item(s) as soon as possible to any library in San Mateo County. Libraries no longer charge overdue fines.

If you have any questions regarding the billed item(s), please contact your local library first before paying the fees. Your library's contact information is on the reverse side of this notice. The total amount due may include charges not listed below.

To pay online for lost items, visit <https://plsinfo.org/>. Click on "My Account," select your library and log into your account.

Current Review File Allocation		
# of Files	Max Records	# of Records
10	100	1,000
10	250	2,500
10	500	5,000
41	1,000	41,000
10	2,500	25,000
10	5,000	50,000
10	10,000	100,000
5	25,000	125,000
4	50,000	200,000
6	75,000	450,000
2	100,000	200,000
0	250,000	0
1	675,500	675,500
TOTAL		1,875,000

Proposed Review File Additions		
# of Files	Max Records	# of Records
5	100	500
4	250	1,000
4	500	2,000
-6	1,000	-6,000
1	2,500	2,500
1	5,000	5,000
2	10,000	20,000
1	25,000	25,000
3	50,000	150,000
1	75,000	75,000
1	100,000	100,000
1	250,000	250,000
0	675,500	0
TOTAL		625,000

Final Review File Allocation		
# of Files	Max Records	# of Records
15	100	1,500
14	250	3,500
14	500	7,000
35	1,000	35,000
11	2,500	27,500
11	5,000	55,000
12	10,000	120,000
6	25,000	150,000
7	50,000	350,000
7	75,000	525,000
3	100,000	300,000
1	250,000	250,000
1	675,500	675,500
TOTAL		2,500,000