

PLS CIRCULATION MANAGERS MEETING

AGENDA

September 19, 2024, 2:00-4:30 pm

Hybrid Meeting – Burlingame Public Library,
Upper Level Meeting Room
480 Primrose Road, Burlingame, CA 94010

Join Zoom Meeting

Meeting ID: 870 4605 9921

Passcode: 925944

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

Facilitator: Natalie Juhl, DCL

Recorder: Nora Mercer, MPL

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
 - a. Minutes from meeting – July 18, 2024 (pg 4-7)
 - b. New Location Code Request **4balt 4babc** – MPL (pg 8-9)
 - c. New Location Codes Request **Ozach Ozahi Ozaja Ozako Ozaru Ozata Ozjhi Ozjja Ozjko Ozjsp Ozjru Ozjta Ozjge Ozjdv Ozjnf** – SMCL (pg 10-12)
- III. PLAN Items
 - a. PLS Delivery Report
 - b. PLAN Report
- IV. Action Items
 - a. Mailouts – SMCL
 - b. County Park Passes subcommittee – SBL
 - c. Library Notice to be updated – DCL
 - d. Changing the batch check-in process – RCL
- V. Informational Items
 - a. October meeting alternate location – DCL
 - b. Past due notices with multiple mailings – DCL

- c. Internal staff phone lines – BPL
- d. Quick pick acquisitions order records – 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 roll call.
- (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

Burlingame Public Library, 480 Primrose Road, Burlingame, CA 94010

Menlo Park Public Library, 800 Alma Street, Menlo Park, CA 94025

Redwood City Public Library, 1044 Middlefield Road, Redwood City, CA 94063

San Mateo Public Library, 55 W 3rd Avenue, San Mateo, CA 94402

Next Meeting: October 17, 2024

Recorder: RCL

Next Admin Council Meeting: October 2024

RCL - January 2024

SBL - February 2024

SMCCCD - March 2024

SMCL - April 2024

BPL - May 2024

SSF - June 2024

SMP - July 2024

No meeting in August 2024

MPL - September 2024

RCL - October 2024

SBL - November 2024

SMCCCD - December 2024

PLS CIRCULATION MANAGERS MEETING

MINUTES

July 18, 2024, 2:00-4:30 pm

**Hybrid Meeting – Burlingame Public Library,
Upper Level Meeting Room
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Join Zoom Meeting

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Facilitator: Natalie Juhl, DCL

Recorder: Jon Jung, SMP

Present : Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Raquel Metcalfe (SBL), Ginny Mies (SMCL), Brian Malibiran (SSF)

Absent : RCPL, SMCCCD

Guests: Vanessa Walden (PLAN), Justin Wasterlain (PLS), Homer Martinez (RCL), Scott Young (PLAN)

- I. Agenda Review – Added to informational: new app, book discard pickup services MSP DCL/SMCL Approved by present Circ managers
- II. Approval of the Consent Calendar (Action Item) MSP SSF/MPL Approved with changes by present Circ managers
 - a. Minutes from meeting – June 20, 2024 - Action items section a. i. Should say “follow section 03.07 patron database management to clear any old charges”
 - b. New iType Request – AD Park Passes
 - c. New iType Request – JUV Park Passes
Circ Manual - 03.01 Patron Library Cards - Circ manual update 03.01 update page 14, should say “under 18”
 - d. Circ Manual - 03.04 Patron Entry Protocols

- e. Circ Manual – 04.01 Establishing Fee Structure
 - f. Circ Manual – 04.02 PLS Patron Notices and Notice Preference
 - g. Circ Manual – 04.02.01 PLS Text of Circulation Notices
 - h. Circ Manual – 04.04 PLS Notice Cycle
 - i. Circ Manual – 04.07 Paying Bills and Fees
- III. PLAN Items
- a. PLS Delivery Report – No sorting tomorrow so no deliveries on Saturday but there will be pickups. Items that do not require pre-sorting will still be delivered.
 - b. PLAN Report – new version of Sierra (6.2) is out, scheduling for upgrade in September. New features: batch order cancels, batch placed holds can be placed on multiple items on same record, when new locations codes are created then scoping can be done by PLAN, patron service denial for one minute if five failed attempts at authentication occurs, log out button for web management reports. Vanessa will be out 07/29 – 08/16. PLAN staff will handle most tickets in Vanessa’s absence. Pressing matters should be sent to her ASAP. Bibliocommons increasing volume of Bibliocore package at no additional cost – 4 new products will be demoed during first hour of 08/20 Info Services meeting. Circ and IS staff are asked to attend and provide feedback.
- IV. Action Items
- a. Mailouts – SMCL - Proposal needs to be sent to Executive Committee first then Admin Council about possible PLS-wide mailout service. Circ managers need to bring this topic to their respective directors. Modification of loan rules may be an issue. Vanessa will test held item delivery feature in Sierra to see if it may mitigate the loan rule issue.
 - b. August meeting (cancel?) – SSF Pending time-sensitive items after agenda call next month. MSP BPL/SBL Approved by present Circ managers
- V. Informational Items
- a. Update from Raquel regarding the county park passes – SBL has requested sub-committee be formed to determine whether funds to purchase passes can be added as part of budget.
 - b. New App – DCPL – PLAN is currently testing and troubleshooting with libraries. Launch date is planned for 08/22. Many items currently need to be fixed.
 - c. Book discard pickup services – SMCL – SMCL currently uses PrimeOne and DR3 but neither service has been particularly reliable. MPL and SBL has used Thrift Books with limited results. BPL is looking into Zoom Books.
 - d. Reminder – RCL - update the days closed table
 - e. Circ Manual – RCL – please let Homer know if you see any inaccuracies with updated sections

- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
- VII. Agenda Building
 - a. Mailouts - SMCL
 - b. County Parks Passes sub-committee – SBL
- VIII. Announcements
 - a. BPL will have open house for end of Summer Learning on 08/15 6-8pm
 - b. SBL – San Bruno Recreation and Aquatic Center has a soft opening on 07/24, 08/24 is the full grand opening
 - c. SMCL – Library outpost at Sanchez had a soft opening already. 07/23 is grand opening. Maker Mobile will be there too.
- 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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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

Burlingame Public Library, 480 Primrose Road, Burlingame, CA 94010

Menlo Park Library, 800 Alma Street, Menlo Park, CA 94025

Redwood City Public Library, 1044 Middlefield Road, Redwood City, CA 94063

Next Meeting: August 15, 2024

Recorder: MPL

Next Admin Council Meeting: August 1, 2024

Recorder:

RCL - January 2024

SBL - February 2024

SMCCCD - March 2024

SMCL - April 2024

BPL - May 2024

SSF - June 2024

SMP - 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: 8/30/2024

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: 4balt; 4babc

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

4balt: Menlo Park – Belle Haven Large Print

4bapt: Menlo Park – Belle Haven Books on CD

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? **Adds Large Print and Book on CD location codes at BHV to match those at MPL.** 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. 9/17/22)

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: 9/19/24

Requesting Library: San Mateo County Libraries

Requestor's email: mies@smcl.org

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

Proposed New Code: 0z

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

0zach – Adult Chinese
0zahi – Adult Hindi
0zaja – Adult Japanese
0zako – Adult Korean
0zaru – Adult Russian
0zata – Adult Tagalog
0zjhi – Children’s Hindi
0zjja – Children’s Japanese
0zjko – Children’s Korean
0zjsp – Children’s Spanish
0zjru – Children’s Russian
0zjta – Children’s Tagalog
0zjge – Juvenile Easy Graphic Novels
0zjdv – Juvenile DVDs
0zjnf – Juvenile Nonfiction

(See section III for information on how to properly format a new code)

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

- A. Location codes: To what library and collection does this item belong?
Library: San Mateo County Libraries Pacifica Sanchez Library Outpost
Is this a new location code? **Yes**
Why is it different from the location codes your library already uses? **The Sanchez Library Outpost is a library vending machine that will be located outside of the Pacifica Sanchez (1z) branch. A new location code is needed to differentiate items going to the Outpost (0z) versus to Pacifica Sanchez (1z).**

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.) **NA**

- B. Patron types (P-types): Different patrons have differing privileges. Is this a new p-type? What are the check-out, hold and fine limits for this new p-type? Will the p-type be sent to collections (Collection Agency setting)? How long before this card expires? What makes it different from the other patron types already defined? If

the proposal is not for a new p-type, list the p-types that may or may not be included in the LRDT. See section III for formatting. **NA**

- C. Item types (I-types): What types of material is it – print, media, or equipment? Is this a new i-type? Who may check it out and how long will it be borrowed. Which patrons have privileges to check out this item? Adult, juvenile, nonresident; all patrons or library use only? What makes it different from the other i-types already defined? If the proposal uses an existing i-type, list the patrons and location codes that may or may not be included in the LRDT. See Part III, Table 2 and Table 2A for formatting.
- D. Loan rules: Loan rules define the loan period, renewals, fines, holds, processing fee and notice cycle. Is this a new loan rule? What is the loan period, number of renewals and fine level? What is the notice and billing cycle? Which location codes are used? How are existing patron (p-types) and materials (i-types) affected? What makes this rule different from existing loan rules? Do you need a “no fines” loan rule? (If yes, two Loan Rule Elements Forms need to be submitted.)
- E. Patron Code 2 (P2): How will this be used with patron types? Are there any special privileges with the patron types and the Patron Code 2? What are the check-out, hold and fine limits for this new patron? How long before this card expires?

Be prepared to attend and discuss the request at a Circulation Manager’s Meeting.