



SANTA CRUZ PUBLIC
LIBRARIES
A City-County System

LIBRARY JOINT POWERS AUTHORITY BOARD

Monday, July 12, 2010
Central Branch Community Meeting Room
224 Church Street, Santa Cruz

6:30 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA
3. APPROVE MINUTES
 - A. Reapprove minutes of May 3, 2010 as originally presented based on transcript of discussion about motion regarding financial sustainability task force (PG. 2-11)
 - B. Approve minutes of June 7, 2010 as footnoted (PG. 12-16)
4. ORAL COMMUNICATIONS
5. CONSENT AGENDA
6. WRITTEN COMMUNICATIONS (PG. 17-75)
 - A. Articles About Santa Cruz and California Libraries (PG. 17-33)
 - B. Patron Written Comments (PG. 34-36)
 - C. Articles on Libraries Nation Wide (PG. 37-47)
 - D. Monthly Narrative Reports- May and June 2010 (PG. 48-60)
 - E. Monthly Statistical Report (PG. 61-67)
 - F. Monthly Spotlight: Circulation (PG. 68-70)
 - G. Borders event (PG. 71)
 - H. Grant award (PG. 72-75)
7. REPORTS OF ADVISORY BODIES
 - A. Friends of the Santa Cruz Libraries, Inc. (oral)

B. Finance Committee Minutes and Oral Report (PG. 76-77)

8. MEMBER REPORTS

- A. Scotts Valley Report (Reed)
- B. Capitola Report (Storey)

9. STAFF REPORTS

- A. Monthly Financial Reports (PG. 78-87)
- B. Calpers Actuarial Issues Report (PG. 88-111)
- C. Resolutions to accept trust and grant funds (PG. 112-116)
- D. Working Capital Cash Loans (PG. 117-118)
- E. Motion to approve staffing plan consultant contract (PG. 118)
- F. Wish List Project Report (PG. 119-120)
- G. Gifts Policy: Financial Donations (PG. 121-124)
- H. Two week closure options (PG. 125-129)
- I. Library policies updating (PG. 130)
- J. La Selva Beach Pilot project update (oral)

10. OTHER BUSINESS

- A. Task Force on Library Service Models (oral update)
- B. Grand Jury Report response (oral)
- C. Library Director Evaluation (oral)
- D. August meeting (oral)
- E. Parking Lot List Review (oral)
- F. Board Evaluation Update (oral)

11. NEXT MEETING

The next regularly scheduled meeting is Monday, August 2, 2010 at 6:30 p.m.

12. ADJOURN

The Library Joint Powers Authority Board will adjourn from the regularly scheduled meeting of July 12, 2010 to the next regularly scheduled public meeting on August 2, 2010 at 6:30 pm in the Community Meeting Room of the Central Branch Library.

The Santa Cruz City-County Library System does not discriminate against persons with disabilities. Out of consideration for people with chemical sensitivities, the Library requests that you attend fragrance free. The Central Branch Library is a fully accessible facility. If you wish to attend this public meeting, and you will require special assistance such as sign language or other special devices in order to attend and participate, please call (831) 420-5600 seventy-two (72) hours prior to the event to make arrangements for assistance. Upon request, agendas for public meetings can be provided in a format to accommodate special needs.

SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD

MINUTES

May 3, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

6:30 PM CLOSED PERSONNEL AND LITIGATION SESSION

1. Conference with Legal Counsel-Initiation of Litigation
Initiation of Litigation Pursuant to Subdivision (c) of Sec. 54956.9
Number of Potential Cases: One
2. Labor Negotiations (Government Code 54957.6)
Lisa Sullivan-Negotiator
Employee Organizations:
SEIU
Operating Engineers, Managers
Operating Engineers, Supervisors

7:00 PM PUBLIC MEETING

I. ROLL CALL

Present: Councilmember Katherine Beiers, Citizen Nancy Gerdt, Citizen Barbara Gorson, Citizen Leigh Poitinger, Councilmember Jim Reed, Councilmember Mike Rotkin, Councilmember Sam Storey, Supervisor Mark Stone, Supervisor Ellen Pirie

Staff: Teresa Landers, Director of Libraries

II. APPROVAL OF MEETING AGENDA OF MAY 3, 2010

Councilmember Rotkin moved, seconded by Supervisor Pirie

that the Board approve the agenda of May 3, 2010.

UNAN

III. APPROVE MINUTES OF APRIL 5, 2010 & APRIL 19, 2010

Supervisor Pirie moved, seconded by Councilmember Storey

that the Board approve the minutes of April 5, 2010.

UNAN

Abstain: Rotkin

Councilmember Rotkin moved, seconded by Supervisor Pirie

that the Board approve the minutes of April 19, 2010.

UNAN

Abstain: Beiers

VI. ORAL COMMUNICATIONS

Eighteen members of the public spoke to the Board expressing their concern over the closure of branch libraries.

VII. CONSENT AGENDA

None

VII. WRITTEN COMMUNICATION

- A. Articles About Santa Cruz and California Libraries
- B. Patron Written Comments
- C. Articles on Libraries Nation Wide
- D. Letter from Library Financing Authority
- E. Monthly Narrative Report
- F. Monthly Statistical Report
- G. Monthly Spotlight: Reference

VIII. REPORTS OF ADVISORY BODIES

A. Friends of the Santa Cruz Libraries, Inc.

Sherry Skold reported the following Friends' activities:

- Embarking on \$1 million Fundraising Campaign Supporting the Library System
- Last Year the Friends gave Over \$195,000 to the Library System
 - *\$99,000 Books and Media
 - *\$6,700 Adult/Youth/Children Programs.
 - *\$2,000 Programs at the Branches and Chapters
 - *\$32,000 Remodeled Friends Bookstore in the Central Branch Lobby
 - *\$53,000 Allocated for Self Check Machines System-wide
- Tracking and Supporting Volunteers to Support the Library System
- Jerry Patrick, Professional Fundraising Consultant, was hired to provide an action plan for the Friends Board.
- Spring Civic Book Sale: Friday 5/21 for Friends' Members & Saturday 5/22 for the Public

B. Finance Committee

Board members reviewed minutes from February 22 and March 29, 2010.

During April's Finance meeting the members reviewed financial reports that are presented in the May 3, 2010 Board packet.

VIII. MEMBER REPORTS

A. Scotts Valley Report

Councilmember Reed reported the Scotts Valley City Council approved the Scotts Valley Library Project during their meeting in April. The City of Scotts Valley will be going out to bid soon and hopes to start work July 2010.

B. Capitola Report

Councilmember Storey reported that the ad-hoc committee met with library architect, Pamela Anderson. She gave a PowerPoint presentation on the architecture of bay area libraries. The committee agreed to go on a tour of a few of these libraries to get a better perspective.

The committee will also be bringing its site recommendation to the Capitola City Council next week. The recommendation will most likely be the current site location.

The committee also discussed funding options to help develop the new Capitola Library but these talks are just in the beginning stages.

IX. STAFF REPORTS

A. Monthly Financial Reports

The Library Director reported on the current financial status of the library and the Board reviewed revenues, expenditures and cash flow for the library system.

B. Change in Phone System

Councilmember Rotkin moved, seconded by Councilmember Beiers

that the Board approve the change in phone systems conceptually and direct staff to enter into contract negotiations. The final contract will need Board approval.

UNAN

C. Update on Self Check

Self-check went into effect at Live Oak and the staff at Live Oak have handled the transition with great ease. They have achieved 84%-88% self-check when helping patrons. This project has been very staff intensive but has been going very well.

D. Update on La Selva Beach Pilot Project

Staff and the La Selva Beach community will be meeting to finalize details on the volunteer pilot project. The launch of this pilot project is tentatively scheduled for June 1, 2010.

X. OTHER BUSINESS

A. 10/11 Budget Discussion

Councilmember Rotkin moved, seconded by Councilmember Reed

that the Library Joint Powers Authority Board authorize library staff to develop the following budget guidelines for the adoption of the final budget at the June meeting:

- cut materials budget by \$272,000
- cut temporary personnel budget by \$71,000
- direct staff to explore the option of spreading the cost of the ILS system over 2 fiscal years (exclude from motion and vote on this item separately)
- charge the LJPB Finance Sub-committee to keep a close eye on the on-going budget
- reduce \$30,000 from landscaping budget
- recognition that this is not a sustainable budget past the current year
- there needs to be another process for long-term financial sustainability
- add the negative fund balance into the presentation of the budget

AYES: Poitinger, Beiers, Reed, Storey, Stone, Rotkin, Gorson

NAYES: Gerdt, Pirie

Councilmember Rotkin moved, seconded by Councilmember Reed

that the Library Joint Powers Authority Board authorize library staff to explore the option of spreading the cost of the ILS system over 2 fiscal years.

AYES: Poitinger, Gerdt, Reed, Storey, Pirie, Rotkin

NAYES: Gorson, Beiers, Stone

B. Long Term Financial Sustainability

Supervisor Stone moved, seconded by Supervisor Pirie

that the Library Joint Powers Authority Board authorize a sub-committee charged with developing a long-term financial sustainability plan for the library system. The model would support consistent delivery of services, programs and materials and is aligned with revenue projections; and which allows the library system to maintain a healthy and stable financial positions.

The committee be made up of 4 Board members and a representative from each library branch (10 Branches). This process would begin as soon as possible but the deliverables from this sub-committee would not be expected until December 2010/January 2011.

The 10 representatives will be chosen by the 4 Board members serving on this committee.

AYES: Gerdt, Beiers, Pirie, Stone, Storey

NAYES: Rotkin, Poitinger, Reed, Gorson

AMENDMENT:

The committee be made up of 4 Board members and 5 interested members of the public chosen by the 4 serving Board members.

AYES: Rotkin, Poitinger, Reed, Gorson

NAYES: Gerdt, Beiers, Pirie, Stone, Storey

C. Parking Lot Review

Board reviewed the parking lot list.

D. Strategic Plan Revised Draft

Councilmember Storey moved, seconded by Councilmember Rotkin

that the Library Joint Powers Authority Board approve the Library System 3-5 Year Strategic Plan.

UNAN

E. Board Evaluation Update

None

XI. NEXT MEETING

The next regularly scheduled meeting is Monday, June 7, 2010 at 6:30 pm.

XII. ADJOURN

The regular meeting adjourned at 10:40 p.m.

Respectfully submitted,

Kira Henifin, Clerk of the Board

All documents referred to in these minutes are available in the Library Office.

x. Other Business B. Long Term Financial Sustainability

11

You know I think we have all been involved in these things so much of it is about process it really is it's...it's...outlining how the meetings are going to work and whose chair and that's all process and all those decisions go back and that's where you get into trouble and that's exactly (inaudible) support what Nancy was saying about bringing the people in so...so we are transparent right from the beginning. That's why I even had a little trouble with the charge so then I think this group will rewrite their charge and rewrite their rules and and their goals and so yeah I can't imagine having two groups one meet start late....

Pirie

What what if we did sort of a little slight a compromise of sorts which is you have the 4 board members and then we have a member from the 4 Friends' groups that were mentioned that you mentioned and one from the bigger Friends' groups that would be a total of 9 people and that's a manageable group.

Landers

My concern is geographically you (um) you've left out (um) Live Oak, (Beiers: La Selva)...no La Selva's got a Friends' group but Live Oak is a community that is underrepresented (um) on this Board so it's interests and it's and important community (um) Aptos maybe ..

Rotkin

What about the City of Santa Cruz (inaudible) we have three branches (inaudible) there is going to be branches but not our three.

Pirie

Okay...okay...so much for that compromise (laughter)

Reed

That'll teach you to try

Stone

→ I would like to make a motion that we move forward with this proposal (um) start it as soon as you can get it going but recognize that the deliverables instead of November I would say shoot for December or maybe January (inaudible) you get that done in November that's great I just agree with Ellen and Katherine I just don't think it's going to get reasonably done then in time and I think 4 members from this board and then 1 member representing each branch those branches that have Friends' to ask them (um) otherwise ask the at each branch to among their patrons I do think there is a community around each branch and getting' folks to apply (um) maybe we could ask the Friends of the Santa Cruz Library to sort of help that for us or kind of vet it through the subcommittee of 4 to pick appropriate folks who are willing to do work and do the research and be a part of this. Putting together the information (um) and then bring that back to us in essentially this time frame but (ah) allow that it is probably going to be by the time it gets to us for decision probably December January I would expect it be that time frame.

Gorson
(um) yes

Farthing (public)
I just like to say that there are patrons of this library that are not represented by each branch

O'Grady (public)
By any branch

(Board agreement)
Stone
Yeah Outreach folks good point. But that makes the committee 15 that's fine (stammering) each of those represents a constituency and a board prospective I don't care if that's.....

Landers
Except I think Gale and correct me if I'm wrong what she's also saying is Bookmobile and Outreach serves many constituencies that are very different from Bonny Doon to Davenport to Beach Flats to (um) I mean they are all very different in terms of (inaudible)

Stone
Well I'm not....and point well taken I'm not suggesting that this is perfect I...I'm just trying to find a simpler way of getting enough representation (um) on this body that we have (stammering) a wide group of folks to draw and (inaudible) expertise willingness to participate and work in this and from you know geographically kind of spread throughout the county.

Pirie
I'll second the motion.

Gorson
Ok Mike.

Rotkin
So I have an amendment I will try and it may not go anywhere but I'd rather see a group of 4 people from this body and 5 member of the public that this body picks based on applications in which we would be looking for geographic spread. They don't necessarily have to be Friends' of the Library I mean we could certainly ask them to if we could advertise it through them, advertising through all the 4 sub Friends' groups at various committees but make it a smaller group that's more effective and efficient. 15 people is a difficult group to manage it is so that's my amendment if it gets a second we'll vote on it if not it'll die.

*

Gorson

Okay...so...(um) let me rephrase the motion here we had a we had a (um) motion and a second, we had a second correct? (some board members answered yes) (um) and that would be to conceptually follow the proposal however (um) moving forward as fast as possible understanding the issues over the summer push the (um) deliverable which is coming back to the full board with a range of alternatives out to January February time let's say (Rotkin: he didn't say February) (several board members agree January) (um) the committee would include 4 members of the board (um) plus one person from each branch (um) plus the bookmobile I'm not clear on your bookmobile proposal or outreach

Stone

I'd rather just keep right at (stammering) the 10 branches

Gorson

Okay. One from each of the ten branches

Pirie

To be selected.....

Stone

Well the 4 Friends groups to be selected there...my thought was (um) ask the Friends of the Santa Cruz Library the larger Friends' group to (um) reach out to the branches to work sort of with their constituencies or members of the Friends group who identify with libraries I'm not quite sure how to finesse around that but ideally somebody who's a user and engaged in that branch so we have more information about the branches. But the four groups that have identified Friends' groups that was pretty straight forward the other ones (inaudible) to discern.

Gorson

Okay.

Beiers

Can I ask...Teresa would (um) supervisors of the branch they'd probably know....

Landers

I think it is going to be extremely difficult to do.

Beiers

Oh okay then we'll leave them out.

Landers.

I mean in terms of identifying those other six people I think it is going to be very difficult so (inaudible).

Pirie

Couldn't we just.....

Beiers
The committee will take that on.

Pirie
We could just you know post a sign at each branch and ask them to apply. And then we choose from the applications.

Gorson
And when we saw we choose (Landers talking) Well in the motion who would be the who would be the final choosers of these the subcommittee, of the 4 members of the board....okay....okay so it would be one representative from each of the 10 branches (um) and they would be selected by the 4 board members serving on the subcommittee is that correct?

3*

Rotkin
Combination of advertisements at the branches and helping...seeking help from the Friends....

Stone
Yeah I think seeking help from the Friends...

Rotkin
That's how we would recruit for a group that they would select from us

Gorson
Right I think the 4 board members would have to come up with criteria, etc. you know what is some job description if you will (chuckle) so people know what their getting into. (um) And the so since it's late and I'm forgetting all of my process do we take the motion first of the amendment first?

(board members talking all at once)

Gorson
Did not get seconded, okay.

Poitinger
Actually I would second Mike motion.

Reed
There is already a motion on the floor right?

Stone
That is amending the motion

Rotkin

I'm amending the main motion so we take that amendment first (inaudible) I don't think it needs further debate its clear what my argument is a smaller group and...

Gorson

And the amendment is 4 board members, plus 5 members of the public..

Rotkin

Selected by the 4 people or open ended how they do it I would encourage them to make sure and just check and would have to look for geographically dispursement

Gorson

Okay so, so we vote on the amendment first is that correct?

Reed

So we're voting on Mike's amendment after we vote on Mike's amendment where we'll vote on Mark's motion, right

Rotkin

Right because I'm not going to shape the main motion

Pirie

His amendment may change Mark's motion

Reed

Right

Rotkin

And that's not undermining its consistent (inaudible)

Gorson

Alright so we have the amendment all in favor (board members vote ayes and naves) okay let's have the no's raise their hand (laughter) 1,2,3 it fails...okay so now were onto

* Mark's motion which I just summarized all in favor (board member vote ayes and naves) okay it passed.

SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD

MINUTES

June 7, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

6:30 PM CLOSED PERSONNEL AND LITIGATION SESSION

Labor Negotiations (Government Code §54957.6)

Lisa Sullivan-Negotiator

Employee Organizations:

SEIU

Operating Engineers, Managers

Operating Engineers, Supervisors

7:00 PM PUBLIC MEETING

I. ROLL CALL

Present: Councilmember Katherine Beiers, Citizen Nancy Gerdt, Citizen Barbara Gorson, Citizen Leigh Poitinger, Councilmember Jim Reed, Councilmember Mike Rotkin, Councilmember Sam Storey, Supervisor Mark Stone, Supervisor Ellen Pirie

Staff: Teresa Landers, Director of Libraries

The Chair of the Board reported out on the closed session meeting. The meeting was held to discuss labor negotiations. The Board heard from the labor negotiator, received input and gave her direction. No decisions were made.

II. APPROVAL OF MEETING AGENDA OF JUNE 7, 2010

Councilmember Reed moved, seconded by Councilmember Rotkin

that the Board approve the agenda of June 7, 2010.

UNAN

III. APPROVE MINUTES OF MAY 3, 2010

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the minutes of May 3, 2010 with the following correction to the motion made under X. Other Business, B. Long Term Financial Sustainability. The motion was corrected to read as follows:

The committee be made up of 4 Board members and a representative from each branch (10 Branches). Where there is a Friends' organization that the representative for that branch be nominated by the Friends' organization and where there is no Friends' organization that the Board seek the help of the broader Friends' organization. This process would begin as soon as possible but the deliverables from this sub-committee would not be expected until December 2010/January 2011. The 10 representatives will be chosen by the 4 Board members serving on this committee.¹

UNAN

VI. ORAL COMMUNICATIONS

Andrea Roth, patron, expressed her gratitude to the staff at the Central Branch Library. She wanted to publicly state her support for the Central Branch Library and its programs. She made special mention of the Youth Services Librarians Linda White, Sue Graziano and Emily Galli. In light of the recent attention paid to neighborhood branches, she wanted to show her support for her neighborhood branch, the Central Branch Library.

VII. CONSENT AGENDA

None

VII. WRITTEN COMMUNICATION

- A. Articles About Santa Cruz and California Libraries
- B. Patron Written Comments
- C. Articles on Libraries Nation Wide
- D. Monthly Narrative Report
- E. Monthly Statistical Report
- F. Monthly Spotlight: Access Services

VIII. REPORTS OF ADVISORY BODIES

A. Friends of the Santa Cruz Libraries, Inc.

Carole McPherson reported the following Friends' activities:

- Civic Sale brought in approximately \$17,000 and was staffed by approximately 100 volunteers
- Friends' Board Retreat will be held June 12, 2010 with a focus on fundraising
- Managing Director of the Friends' is still out on medical leave
- Friends' Treasurer, Bob Rible, is working on new pie charts to illustrate the Friends financial expenditures/contributions

¹ the correction is being stricken after review of the tape

- Recruiting Board Members and would like to ask the LJPB members to make recommendations; there is a specifically a need for an attorney

Friends of the Santa Cruz Libraries, Felton Chapter

Paul Machlis reported the following Felton Friends' Chapter activities:

- Hosting 7 summer programs in conjunction with the Felton Branch Library

B. Finance Committee

Board members reviewed minutes from the May 24, 2010 meeting.

VIII. MEMBER REPORTS

A. Scotts Valley Report

Councilmember Reed reported that bids for the new Scotts Valley Branch Library would be opened and reviewed June 22, 2010.

B. Capitola Report

Councilmember Storey reported that the ad-hoc committee is now entering into the design phase for the new Capitola Branch Library. They were able to visit three library branches in San Jose. These visits gave the committee a vision as well as good ideas into the future Capitola library design.

IX. STAFF REPORTS

A. Monthly Financial Reports

The Library Director reported on the current financial status of the library and the Board reviewed revenues, expenditures and cash flow for the library system.

B. Role of Volunteers

The Board reviewed the Director's comprehensive report on the use of volunteers. The Board agreed that to expand the volunteer program a volunteer coordinator and possibly other staff would need to be hired in order to provide better supervision and tracking. The Board also discussed that trying to expand the volunteer program while contracting staff would not be beneficial at this time.

C. Phone System

The Director reported on the implementation of the new phone system for the library. The Board will most likely need to approve an implementation contract but the other costs will be spread out and will not require a signed contract. The Library has received a preliminary offer to purchase the existing phones.

D. Update on La Selva Beach Pilot Project

The Director reported the following activities regarding the LSB Pilot Project:

- Self-check machine will be installed sometime after June 16, 2010
- 2 Volunteers have been trained
- Library staff have been allocated
- Hours: Tuesday 1-7pm and Thursday 10-6pm
- Story time will be held on Tuesday morning when the branch is closed
- Start Date for this project is tentatively set for June 22, 2010

X. OTHER BUSINESS

A. 10/11 Budget Discussion

Supervisor Pirie moved, seconded by Councilmember Storey

that the Library Joint Powers Authority Board adopt Resolution #2010-004 approving the FY 10/11 Library Budget as presented.

UNAN

Jack Dilles, City Finance Director, reported that the Santa Cruz City Council approved loaning money to the library not to exceed \$1 million at the City's portfolio rate for FY 10/11. In addition, the City Finance Director and/or the City Manager has the authority to freeze the loan options if City finances become strained. In FY 11/12 if the Library continues to borrow from the City, the interest rate will be charged at 2% over the portfolio rate.

The Library Director also reported to the Board that to date SEIU has not agreed to continue concessions from last fiscal year. These include continuing the 10% furlough and delaying a 5% COLA scheduled to go into effect on October 2, 2010. If an agreement is not made the furlough for SEIU members will end July 9, 2010, the COLA will go into affect October 2, 2010 and the Library's liability for personnel related expenses for FY 10/11 will increase by approximately \$677,102. The Director asked the Board to consider a contingency plan to deal with this potential shortfall. The second includes the closure of 5 branches.

The Board agreed to a contingency plan if in fact an agreement has not been made. Contingency plans that were considered potentially viable included a system-wide closure of approximately 8-12 weeks with the exception of one branch being open minimal hours and staffed by the remaining employees in the library. The lay off of SEIU employees for this time period would help to meet the approximate \$677,000 budget shortfall. The second option included layoffs with hours of service reduction. Finally, the third option included the closure of 5 branches. The Board agreed to base its contingency plan on option one.

A library SEIU steward and a member of the SEIU negotiating team for the library, expressed to the Board the library members willingness to continue the furlough. They asked the Board to request a side letter in order to continue the library furlough agreement.

B. Task Force on Library Service Models

Chair Gorson reminded the Board and the public that they are continuing to receive applications for the task force.

C. Parking Lot Review

Board reviewed the parking lot list.

D. Board Evaluation Update

None

XI. NEXT MEETING

The next regularly scheduled meeting is Monday, July 12, 2010 at 6:30 pm.

The Board has tentatively scheduled a special session meeting for Monday, June 21, 2010 to discuss the personnel budget if a furlough agreement has not been made.

XII. ADJOURN

The regular meeting adjourned at 9:04 p.m.

Respectfully submitted,

Kira Henifin, Clerk of the Board

All documents referred to in these minutes are available in the Library Office.

SLV Press Banner
6/25/10

Grand jury calls for change in library system

By Michelle Camerlingo
Press-Banner

The Santa Cruz County Grand Jury has called for a dramatic shift in the way the Santa Cruz Public Library system is run after finding aging facilities, archaic technology, a declining collection and no cash reserves.

The library's Joint Powers Board, which runs the county's public library system, recently approved a budget for fiscal year 2010-11. The budget includes a continued reduction in open hours at branches, a trimmed allocation for books and materials, and slimmer allowances to improve technology or build reserves.

The grand jury report, released last week, said the priorities that drive this year's budget do not ensure the libraries' long-term health.

At a glance

Those who want to walk in the Boulder Creek Fourth of July parade with the Boulder Creek Library Friends should meet at Foster's Freeze, 110 Mountain St., at 9 a.m. July 4. The parade starts at 10 a.m.

"New technology would keep the system afloat. The system they have now is very antiquated, and if their integrated system goes down, they're dead in the water," said Doug Horton, chairman of the grand jury committee that studied the libraries. The grand jury is a group of 19 citizen volunteers who investigate and recommend ways to help governing agencies run more effectively and efficiently.

The report did not directly recommend closing the smallest of the system's 10 branches, but it urged that local communities consider taking over some branches with volunteers until the library system can afford new technology and develop a

But system director Teresa Landers said the grand jury's findings are not news. "We already knew most of what they found," Landers said. "And there are many factual inaccuracies in the report." Landers has until September to answer the questions raised by the grand jury. The report claims the coming Scotts Valley library branch will cost more to run than the system can handle, which Landers said is completely false. "The Scotts Valley library will actually save us money, because we're running it with the same

LIBRARIES

CONTINUED FROM PAGE 2

staff that we already have," Landers said.

Landers said a task force to research and address the libraries' problems has already been put together and will begin working in August.

The libraries' budget shrank from \$12.6 million to \$11.3 million last year and is expected to drop to \$10.7 million over the next few years as the recession hurts tax revenues. This year's budget is less than \$11 million.

About half of the libraries' budget is revenue from Measure R, a quarter-cent local sales

"Obviously, we will take a good look at the proposal to close branches, but also what changes would be needed in order to provide quality collections and services and substantial open hours at all existing branches."

— Paul Machlis, library system task force member

tax first passed in 1996, before it was made permanent in 2008. But the flow of revenue from the tax has tapered off as county residents have bought less during the recession. Paul Machlis, a library task force member who represents the Felton

branch, said the group would look at the long-term sustainability of the Santa Cruz library system. "Obviously, we will take a good look at the proposal to close branches, but also what changes would be needed in order to provide quality collections and services and

substantial open hours" at all existing branches," Machlis said.

Darby Kremers, who represents the Boulder Creek branch on the task force, said keeping that community's library open is important because the town has few public spaces.

"The Boulder Creek library is so far from the other branches, and there are no other community rooms in town," Kremers said. "It is a place where young families can make lasting connections and is walking distance for the elderly. It's pretty much the center of town."

Grand Jury Report on Santa Cruz Library Suggests Relying on Volunteers

By Lynn Blumenstein Jun 23, 2010

(Updated and clarified June 23)

In California, grand juries often serve to investigate government agencies, and the Santa Cruz County grand jury has released a critical report about Santa Cruz Public Libraries (SCPL).

The report called attention to SCPL's lack of funds to adequately run the ten-branch county system, citing an outdated integrated library system (ILS) and other technologies, and what it calls an ineffectual Joint Powers Authority Board (JPAB).

SCPL director Teresa Landers, who's preparing a rebuttal, told *LJ* she thinks the report overemphasizes the value the library might get from volunteers.

But the report, in its suggestions for diminished services, the potential for fee-based service, and greater business involvement in branding the library, may be a harbinger regarding library offerings in tough times.

For now, the library budget has been stabilized in part because of continued staff concessions. According to Landers, concessions that have been tentatively agreed to are continuations of last year's situation-nothing additional. "It is not correct to characterize it as unpaid leave," she clarified, "it is a ten percent reduction in salary accompanied by a ten percent reduction in hours."

Harsh recommendations

The grand jury recommended some temporary harsh actions, including reducing staff by up to 20 percent and the possibility of downgrading some branches to "community centers/reading rooms."

They would run by "their local community.... until the technology infrastructure of the library system is significantly improved and there is a solid financial base that includes cash reserve funds," according to a County of Santa Cruz statement.

Another scenario for certain branches involves one staff member plus volunteers and a self-checkout machine. This pilot project launched June 23 in the smallest and least busy branch.

The grand jury recommended a reordering of priorities, beginning with immediately replacing an aging ILS system (DRA Classic) that is no longer supported by the vendor, establishing a reserve fund pay for expenses to avoid borrowing, and installing self-checkout machines at the three regional branches and improving the current self-checkout rate of eight percent.

It also called for increasing business partnerships/corporate sponsorships, to fund a bookmobile, for example; "re-evaluate[ing] the policy that all services must be free to everyone;" and adding two members to the JPAB who have financial and professional librarianship backgrounds, respectively.

SCPL director responds

Landers told *LJ* that the grand jury investigates a different government agency every year. Hired in 2009, Landers is aware that SCPL must update its technology and become more proactive. She thinks the report could help increase awareness of efforts to keep branches open.

Moreover, SCPL is in the process of implementing self-check system wide. Their first branch to do so achieved an 84 percent self check rate in its first month. SCPL also has budget for a new ILS and will be implementing that by the end of FY10-11.

In a preview of her rebuttal, she told *LJ*, "Volunteers are not a panacea," noting that they "come with a price in terms of management as well as raising difficult issues around confidentiality."

Shortcomings tied to reduced budget

Most of the issues are related to SCPL's budget, which is primarily funded by county property taxes and Santa Cruz and Watsonville city maintenance of effort contributions. (Watsonville is not part of SCPL but the two library systems "are tied together by a Library Financing Authority which serves to disperse the funds collection system wide," clarified Landers.) SCPL also is funded by a quarter-cent sales tax approved by voters first in 1996 and

renewed in 2008.

A combination of rising personnel costs and lower revenues have shrunk the budget from \$12.6 million to \$11.3 million last year and below \$11 million this year, according to the *Mercury News*.

The role of California grand juries

California's 58 county grand juries, required by the state's constitution, are empowered, among other things, to "investigate and report upon the conduct of local government."

LJ in 2008 reported how the Sacramento County grand jury investigated fiscal management issues at the Sacramento Public Library. It called for several new fiscal guidelines, as well as the removal of the Director Anne Marie Gold; she subsequently retired.

In Santa Cruz, the library's reduced budget coupled with citizen complaints about shortened and irregular hours spurred the grand jury to investigate ways to "maximize open hours."

The grand jury determined that SCPL would incur a more than \$4 million deficit by FY13-14 if it were to include funding for technology and restore its reserve fund and materials budget.

Planning for the future

A few years ago SCPL put together a 2008-2013 facilities plan that optimistically called for the one regional branch, two new facilities, and two renovations (two are to be funded with redevelopment money.)

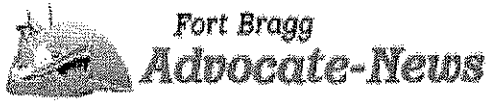
A 2010-2015 strategic plan, released in April, identified crucial data about usage, services ranking (online connection rating the highest), and multi-tiered service offerings (ranging from self-service to full service). It also acknowledged the importance of keeping up with current technology trends. This effort was spearheaded by Landers.

Neither plan addresses SCPL's current budget problems but does "provide the system with a focused future," according to the grand jury report.

In an action independent of the grand jury report, SCPL is calling for volunteers to join a Task Force on Library Service Models to help "identify a range of future service models for the library system" that are financially sustainable. Task force members will deliver a report in January 2011 and participate in developing several service models for consideration.

"We will finish this year and next in the black," Landers told *LJ*, "but we do not have any reserves. "This positive position is based on a ten percent staff furlough and frozen COLAs (cost of living allowances) as well as a greatly reduced materials budget."

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Grand jury says Santa Cruz County library branches need tech upgrade, new books and a savings account

By GENEVIEVE BOOKWALTER--Santa Cruz Sentinel

Posted: 06/10/2010 06:58:03 PM PDT

SANTA CRUZ - The Santa Cruz County grand jury released a report Thursday accusing system leaders of failing to address long-term problems while the system's finances continue to suffer.

"What the grand jury discovered are aging facility and technology infrastructures, a declining collection, no reserves for normal operations or emergencies, and no plans to create the financial foundation that will enable the Santa Cruz Public Libraries to be nimble in meeting the future needs of patrons in an era of rapidly-evolving technology," the report stated.

While the report did not recommend the governing Joint Powers Board shutter the smaller of the system's 10 branches, it did recommend local communities possibly take them over until system leaders can buy much-needed technological infrastructure and build a cash reserve, which they do not have right now.

"They've got to do something," said Doug Horton,

chairman of the grand jury committee that studied the libraries. "If you keep putting it off until next year, things aren't going to get any better until the economy turns around."

Library system Director Teresa Landers said system leaders are researching solutions to the system's problems, and decisions like closing branches are not ones to make lightly.

"They are correct in that we are facing an uncertain and difficult financial future with a need to address various areas such as technology, facilities and collection," Landers said. However, leaders

"do not want to presume that any one solution such as closing branches is the best answer until we explore a variety of possibilities more fully."

Findings and recommendations in the report include:

- n The library system must balance its budget, invest in technology and establish a cash reserve, even at the cost of cutting staff and handing off branches.

- n Losses are expected every year until 2014, with the deficit that year swelling to more than \$4 million.

- n Pending new libraries in Scotts Valley, Felton and Capitola will cost more to run than the system likely can afford.

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Fort Bragg Advocate-News

n Santa Cruz libraries are the only ones in the nation still using an archaic computer program to tracks books borrowed, fines owed and other information. The program's manufacturer no longer supports it, and only one person on staff has the knowledge to maintain it.

n Older library patrons say they prefer local library branches, books and personal service. Younger visitors, however, envision fewer branches with more technological media opportunities in the future.

n "The board, with elected representatives of the cities and county constituting a majority, seems to lack the political will to make the tough decisions that might be unpopular with constituents."

The libraries' dire situation comes after the system's budget shrank from \$12.6 million to \$11.3 million last year. It is expected to keep dropping to \$10.7 million over the next few years as the nation's economic doldrums take their toll on tax revenues. This year's budget is less than \$11 million.

About half of the library system's budget is paid for with revenue from a quarter-cent local sales tax first passed in 1996. County voters in 2008 agreed to make the tax permanent. But as residents shop less during the recession, that revenue stream has fallen off.

Library board member and Scotts Valley Mayor Jim Reed said the report confirms what he has

long been advocating: it's time to cut back.

"Its really hard to argue with anything that's in here," Reed said. "They've identified a system that's in dire straights financially, has too many branches and postpones tough but necessary decisions. Unfortunately, I think there's truth in all three."

However, Reed said he felt the report ignored the fact the new libraries in Capitola and Scotts Valley are being built with outside money at no cost to the library system, and therefore should be looked at as a long-term investment, not a burden.

County Supervisor and library board member Ellen Pirie, an advocate for keeping all branches open, nonetheless said the report was accurate. She is a member of the task force underway to address many of the long-term concerns raised within it.

"This task force is undertaking exactly what the grand jury report is talking about," Pirie said. "This is going to be a really good group looking really seriously at how do we continue library service in Santa Cruz County in the future."

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- Press release
- Grand jury final report
- About the Grand jury

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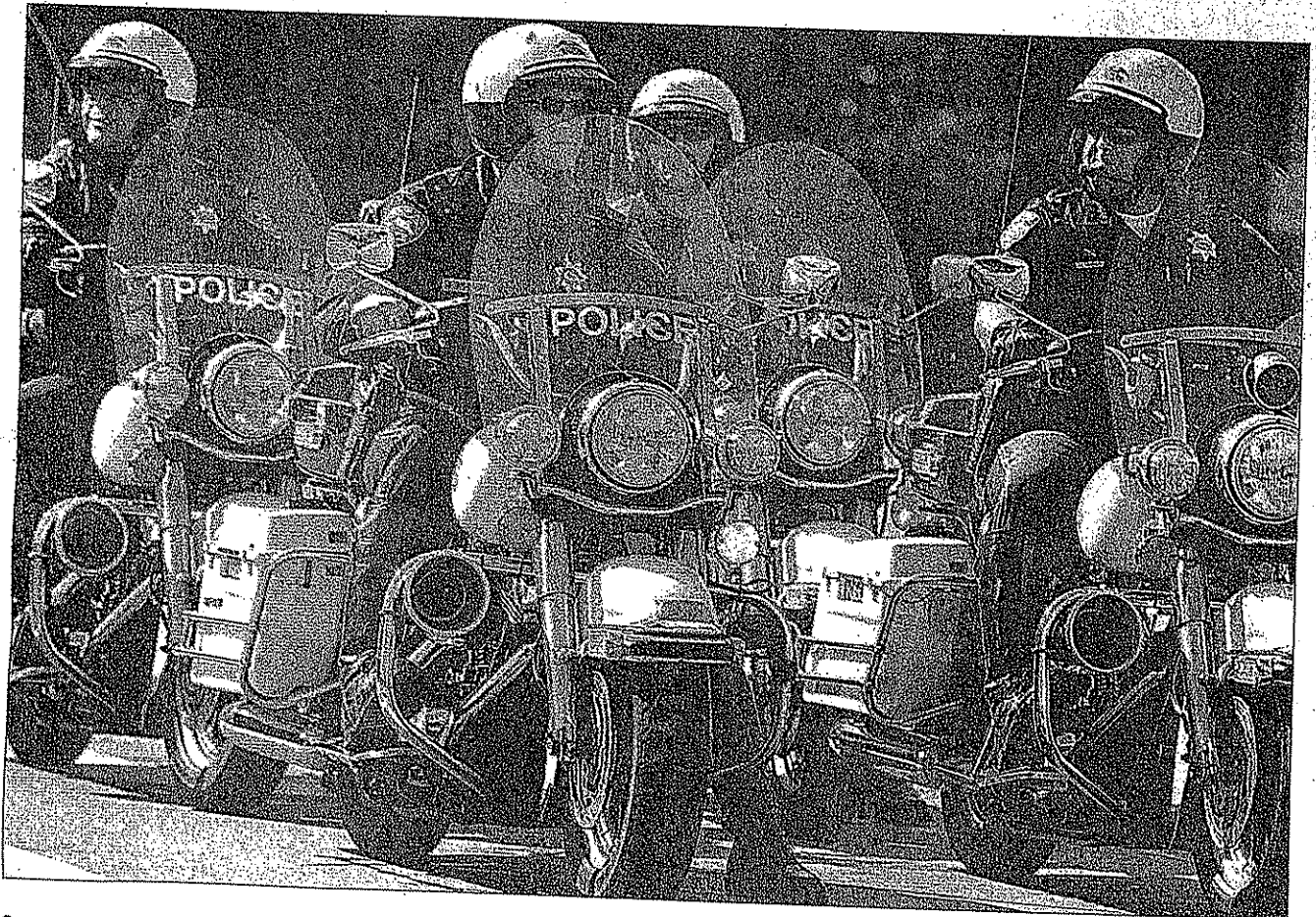


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City faces tough choices with no police, service workers deal



Santa Cruz police officers arrive at the scene of a March 4 protest at UC Santa Cruz. The city is seeking concessions from officers. SHMUEL THALER/SENTINEL

Even if labor concessions are made, city still has \$2 million deficit to close

'We don't have the authority to make people give up their salary or benefits.'

MIKE ROTKIN, mayor

By J.M. BROWN
jbrown@santacruzsentinel.com

SANTA CRUZ — The city's deficit for the fiscal year beginning July 1 could balloon to \$3.7 million if ongoing negotiations with the police union and service workers don't result in significant savings. City leaders also are consid-

ering several tax measures to reduce the deficit, including an increase in sales tax or the utility user taxes. A January poll of 600 residents suggested support for a tax that would bolster funding for city services.

Assistant City Manager Martin Bernal, who will take over as city manager in July,

said the city needs to secure \$1.3 million in concessions from the Service Employees International Union, which represents the city's largest block of workers, and \$400,000 in savings from police.

Otherwise, the city's current \$2 million hole — which

SEE BUDGET ON A2

BUDGET

Continued from A1

the council could plug by using reserves and making future cuts — will nearly double. Other employee groups have agreed to a second year of 10 percent pay cuts through furloughs or equivalent measures.

Without concessions from the remaining two groups, city leaders say they will be forced to consider extreme measures, such as permanent layoffs or shutting down non-essential services for weeks at a time. A \$37-million deficit represents nearly 5 percent of the city's \$75 million general fund revenues.

"We can do that; we have the authority to close," Mayor Mike Rotkin said. "We don't have the authority to make people give up their salary or benefits. We're having very difficult discussions with employees."

The council will hold its first budget hearing Monday, by which time Rotkin said it will be critical to know what the police and service unions will concede.

"I do think we have to know whether they are going to agree to these things or not, and if not, it is going to be a different budget year," Rotkin said. "We have to make cuts now."

SEIU representative Doris Henry said the proposed cuts are a bitter pill to swallow for the union's 465 workers, who are among the city's lowest paid compared to managers, police officers and firefighters. She said taking a second year of furloughs on top of delaying a scheduled 5 percent cost-of-living increase will leave workers struggling to pay bills.

Henry, a parking maintenance worker who has been employed by the city for 28 years, said the union would agree to delay 3 percent of its scheduled cost-of-living increase, which is the same percentage management is delaying. But she said the city also wants SEIU workers to pay a higher share of health care and retirement costs, but won't agree to extend their contracts, which expire in November.

"They are asking us to take less money for another full year," she said. "It's not a fair deal."

Bernal said he under-



Santa Cruz Police Sgt. Scott Garner fills out an accident report on Thursday.

SHMUEL THALER/SENTINEL

stands that service workers are suffering, but said, "We're not asking them to do anything more than they did last year."

Sgt. Mike Conner, president of the police union, said he hopes to be able to reach an agreement with the city soon. While police don't have to take a 5 percent pay cut through furloughs this year due to ongoing public safety concerns, officers won't get pay raises.

"It really affects the brand new guys, those recently out of the academy who are trying to support themselves," Conner said. "We're just like everybody else who's having difficulty."

To eliminate the \$2 million gap that would still exist even if all employee concessions were made, Bernal said he will recommend the council pull \$1 million from reserves and identify another \$1 million in cuts during the next year.

Although the city is unable to keep pace with labor costs, revenues are predicted to be flat rather than in decline, Bernal said. The city expects to take in \$43.7 million in taxes, the largest source of city revenue, compared to \$43.1 million last year.

"That's a good thing. At least it's not negative," Bernal said. "We're seeing stability for the first time in a long time."

The \$75 million in revenue is 8.4 percent less than two years ago. In calendar year 2009, the city eliminated 27 positions, or about 3 percent of the work force, through layoffs and eliminating vacancies.

In his 30th budget message, retiring City Manager Dick Wilson noted that San-

ta Cruz employs 110 people fewer than it did a decade ago, a cut of 25 percent. The grim report warns the council about the need for eventual pension reform, and says past practices of giving merit or automatic cost-of-living pay increases and paying 90 percent or more of health benefit costs will not be viable again.

"The pre-recession economy is not coming back," Wilson wrote. "We must adapt to the one we have."

Rotkin said committing to long-term reform will be critical to winning public and business support for a tax increase.

"I don't think we'll persuade the public to give us more money this time without that," he said.

In a poll of 600 residents conducted in January, 59 percent of responders said they would definitely or probably support a quarter-cent sales tax increase to support city services. A quarter-cent increase in sales tax could generate about \$2.5 million in one year, and a hike in the utility tax could raise a similar amount.

Two-thirds of voters must approve a tax increase designated for a specific purpose, such as public safety spending. But if the proposal is worded more generally to give city leaders greater flexibility in how to allocate the money, voters have to approve it only by simple majority.

Bernal said the city will also study its fee structure to determine if any increases are appropriate, including in the parks and recreation division. But, Bernal cautioned, increasing the cost of recreational

GENERAL FUND

FISCAL YEAR 2011

Projected revenue:

\$75.3 million

Projected expenses:

\$77.3 million

FISCAL YEAR 2010

Projected revenue:

\$74.5 million

Projected expenses:

\$73.8 million

FISCAL YEAR 2009

Revenue: \$82.2 million

Expenses: \$87.9 million

Source: City of Santa Cruz

CITY SPENDING BY DEPARTMENT

Below is a snapshot of general fund spending in the city of Santa Cruz's proposed 2011 fiscal year budget:

Police: \$22.4 million

Fire: \$12.3 million

Parks and Recreation: \$9.1 million

Library: \$9 million

Public Works: \$5.5 million

Planning and Community Development: \$3.7 million

Human Resources: \$3.2 million

Finance: \$2.5 million

Economic Development and Redevelopment: \$1.8 million

Social Services: \$1.2 million

Other: \$6.6 million

SOURCE: City of Santa Cruz

activities often leads to a decrease in participation, which drives revenue in the wrong direction.

In the January poll commissioned by the city, 59 percent of residents identified gang activity as the city's most vexing problem. Crime downtown was identified as the third most serious problem.

After a gang-related homicide on the Westside and a downtown riot that caused \$100,000 in damage, the City Council approved filling eight vacant police officer positions earlier this month. The extra \$1 million in police spending is reflected in the current \$2 million deficit, as is the council's decision to end furloughs for police.

While the police department has been understaffed by 17 percent throughout the fiscal year that ends in June, there has been record number of calls for service, 85,000.

"The department must engage in continuous tri in the face of such demand," Wilson wrote.

The council could take the budget as early as 22, but if the final draft is ready by then, the vote could be moved to July 13.

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Prospect of SEIU budget deal looks promising

Management is less optimistic about reaching accord with police union

By J.M. BROWN

jbrown@santacruzsentinel.com

SANTA CRUZ — While a cost-saving deal with police may be elusive for next year's budget, a top city official said Friday that another large block of municipal employees will likely forgo a scheduled raise to prevent layoffs and a temporary city shutdown.

Assistant City Manager Martin Bernal, who will become city

manager Aug. 2, said negotiators made significant progress during talks Thursday with the Service Employees International Union. He said he felt confident enough to recommend calling off Monday's emergency budget meeting by the library board to deal with SEIU employees in that system.

"We're optimistic that we can come up with the solution, that it's going to be OK," Bernal said. "It's last-minute, but at least

it's progress."

Bernal said he hopes to cement the \$1.3 million savings deal with SEIU next week, in advance of the City Council's July 13 vote on a \$75 million general fund budget. Absent an agreement with SEIU, however, Bernal has warned of closing nonessential city services for more than a month, which would mean temporary layoffs

SEE BUDGET ON A2

BUDGET

Continued from A1

and loss of benefits for hundreds of workers.

Library assistant Leslie Auerbach, who serves on SEIU's bargaining team, said she also was "far more optimistic" about negotiations than she has been in recent weeks, when dozens of workers appeared before the council to denounce the city's demands.

"I think we're getting close," Auerbach said. "There is still ground to be covered and we both have different views about who is making the greatest sacrifices."

Without concessions, SEIU workers would get a 5 percent cost-of-living increase and police would get a 2 percent bump and various step increases.

But the city is asking SEIU, which represents 485 workers, to take a second year of furloughs and delay the cost-of-living hike. The city also wants police to skip pay hikes to save \$400,000, but is not asking for furloughs amid concerns over gang and drug violence.

"We're really far apart," Bernal said, adding that the city will have to extract greater savings when the union's contract expires next April. "We have to deal with the shortfall one way

or another."

Sgt. Mike Conner, president of the Police Officers Association, said, "I would really like to think we could come to some kind of concession to help the city out."

But he said the city has raised the idea of reducing pension benefits for new hires, a discussion that is taking place in cities and counties statewide. "The POA members have a lot of questions about it," he added.

Retiring City Manager Dick Wilson, in his 30th and final budget report, warned that Santa Cruz's pension plan is unaffordable in the long term. With contracts for SEIU and other employee groups expiring in com-

ing months, city negotiators are expected to press for smaller pensions for future workers.

Even if police and SEIU give up a combined \$1.7 million in concessions, the city still faces a \$2 million hole stemming from drop-offs in sales tax and other revenue. The council is expected to identify \$1 million in savings during the coming year and pull \$1 million from reserves.

To offset the growing cost of public safety costs and other city services, a council subcommittee is studying the possibility of placing a proposal for a quarter-cent increase in the sales tax or utility users tax on November's ballot.

Sc Sentinel 6/19/10

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SANTA CRUZ

Saving frogs topic of talk

Save the Frogs Executive Director Kerry Krueger will discuss the decline of amphibian populations and ongoing efforts to restore their numbers at a free talk Wednesday.

Save the Frogs is a Santa Cruz-based international group dedicated to saving amphibians. Wednesday's event will be 3-4:30 p.m. at the Santa Cruz Central Library branch, 224 Church St.

SC Sentinel 6/15/10

Library Friends leading fundraising drive

As the president of the Friends of the Santa Cruz Library, we are well-aware of the dire financial straits facing the system with the expected results. The Joint Powers Board has begun a process to determine solutions to support our countywide system. Meanwhile, the Friends is embarking on a million-dollar fund development to provide much-needed technological infrastructure, i.e., Integrated Library Services. We have already set aside funds for self-check machines for every branch and purchased a CD/DVD Cleaner, which cleans up to 80 discs at a time. What a difference in appropriate use of staffing this has made. As our community loves the libraries and sees them as vital centers for future generations, we are looking forward to their help by joining our million-dollar campaign drive.

SHARON SKOLD, Ben Lomond

SC Sentinel 6/19/10

Aptos library hosts water-saving talk

The Soquel Creek Water District and Hidden Garden Nursery in Aptos will have representatives on hand Wednesday at the Aptos library, where the reps will share conservation tips and drought-tolerant gardening ideas.

The talk is from 1-3 p.m. Wednesday at the Aptos Branch Library, 7695 Soquel Drive.

Aptos. Call 420-5309.

Instead of waging war, try supporting libraries

The recent grand jury probe of our library system emphasizes the problems and cutbacks it faces because of a limited budget in these hard financial times. Seeing this, I thought of the importance of libraries to our community. Speaking personally, in my 40 years of using local libraries, their staff and facilities have helped my pursuit of various projects tremendously. And I know I'm not alone in my indebtedness. Our too-often-unsung libraries and their staff deserve many thanks. If only we had devoted more of our resources to libraries, and other community services, and fewer to pursuing wars in the Middle East.

Soquel ANDREW NEHEB, Santa Cruz

SC Sentinel 6/24/10

You can see why we want to save the library

I was heartened to see Shmuel Thaler's evocative photos of our Felton Library in the paper. You can see why we love it. A landmark building, convenient for us and for nearby communities, an important resource for people of all ages, a place that educates and inspires. It would be a huge loss if our library were to close. Though eight hours of service is hardly enough, I urge the Library Board to see that we remain open throughout this economic crisis. Every town needs a library. Don't shut ours down.

MARILYN ROBERTSON, Felton

SC Sentinel 6/17/10

Technology keeps libraries running

This is in response to the letter regarding the upgrade of library back-room technologies.

I have 10 years' experience as a library technologist. As the former IT manager for the Naval Postgraduate School Library, I have very high regard for my colleagues at SCPL for having pulled off everyday miracles on a tiny budget. If said technology fails, we won't be able to search the catalog. Overdue notices will not be sent out. Fines will not be collected. Materials will not be checked out, renewed or ordered. Records will not be added or updated. The branches may be open, but they will be little less than reading rooms with no services.

Please listen to the recommendations of the people whose jobs depend on finding the best compromise solution for keeping the public library system afloat — our fantastic and dedicated public library staff.

JUDITH SEDILLOS, Santa Cruz

SC Sentinel Letter to the editor 7/6/10

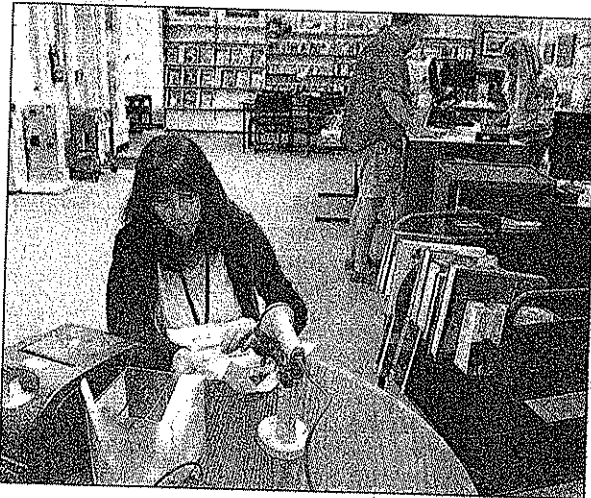
Technology benefits library patrons

I agree 100 percent with Dorothy McLeod's statement in her letter to the Sentinel that the spending priorities should first and foremost directly benefit the library patrons. What she may not realize is that spending on technology does exactly that. The library runs on its computer system. Without it, the whole operation shuts down; staff cannot order, receive, process, search for or circulate materials and patrons will not get their books at all. The current computer system is old and nearly obsolete, and reliant on just one staff member to maintain it. Additional technology, such as self-checkout machines, frees up staff for other tasks, which ultimately results in more open hours, everyone's top priority.

Kathy Hatfield, Santa Cruz

BUDGET WOES

Volunteers give La Selva Beach library a boost



SHIMUEL THALER/SENTINEL

Volunteer Diane Ferraiuolo attaches new bar codes to books at the library in La Selva Beach on Tuesday as paid fill-in staff Carolyn Bryks helps a patron at the check out desk.

By JORY JOHN

newsroom@santacruzsentinel.com

LA SELVA BEACH — The Santa Cruz County Public Library has implemented a pilot program at the La Selva Beach Branch Library allowing the beleaguered location to expand its hours and bring back its popular story time program.

The pilot program, which began June 22, allows for the inclusion of five volunteers to assist staff members with checkouts and other tasks. It also features a self-check computer system purchased by nonprofit Friends of the Library — the computer was also introduced at the Live

IF YOU GO

LA SELVA BEACH
BRANCH LIBRARY

HOURS: 1-7 p.m. Tuesdays, 10 a.m. to 4 p.m. Thursdays. Story time for 3- to 6-year-olds is 10:30 a.m. Tuesdays.

WHERE: 316 Estrella Ave., La Selva Beach

DETAILS: 420-5349

Oak branch and will soon be installed at the Central Branch in Santa Cruz — allowing patrons to borrow books and other items on their own.

SEE LIBRARY ON B6

LIBRARY

Continued from B1

The library board approved the La Selva Beach pilot program to run until December, according to Library Director Teresa Landers. If everything is working well with the program, Landers said, "It will remain in place."

Landers said that the reason volunteerism works at the La Selva Beach Branch is that "the circulation is very low. We really don't need two staff members out there to handle the 'library' piece of it. This allows us to have a second person who's a volunteer. I am not convinced it can work in other branches, given the volume of transactions. My intention at this point is not to expand it, as is, although we may want to look at some hybrid version of it."

It's been a difficult year across the board for the Santa Cruz Public Libraries' 10 branches, which have struggled with statewide budget cuts and hourly reductions. The small La Selva Beach branch, which celebrated its 60th birthday this year, was one of the hardest hit, with its hours initially cut to a mere eight per week, along with Felton's library.

Talks about the pilot program began last fall with the La Selva Beach Friends of the Library, who offered to purchase the self-

check system and recruit volunteers. Since the program's launch, the branch is now up to 14 weekly hours, divided between Tuesdays and Thursdays. Volunteers will work an estimated 11 hours per week, according to Regional Supervisor and La Selva Beach Branch Manager Heather Pereira.

Pereira said there's still an important distinction between a volunteer and a certified public librarian and it's vital to have a staff member onsite at all times to deal with the bulk of the work. Still, she added, volunteers will be able to assist with the checkout system and help add new bar codes to books, among other tasks.

About 15 children and their parents showed up Tuesday to the weekly story-time program led by Pereira. Five picture books were read out loud, before the children — ages 3 to 6 — embarked on an arts & crafts project relating to the books. The program, which was suspended in June 2009 and is in its second week back, encourages an early love of reading, Pereira said.

Rachel Malsbury, a lifelong La Selva Beach resident, remembers story time from her childhood. Malsbury, whose brother Jake now volunteers at the library, said that the program resonates with her, and the community.

"It's one of my fondest memories, all the neighborhood kids coming together," she said. "The library is a huge part of this little community."

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Jeanne McCombs to mobaccdirs

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MOBAC Directors:

The Monterey Public Library Board responded to budget and staff cuts for the fiscal year that begins on July 1, by approving a reduced schedule of Library operating hours. Effective August 1, the Library will be closed on Sundays, and the schedule for the remaining days of the week will be Monday, Tuesday, and Wednesday, 12 noon - 8 p.m., and Thursday, Friday, and Saturday, 10 a.m. - 6 p.m.

For more information contact Library Director Kim Bui-Burton at kburto@cl.monterey.ca.us or call 831.646.5601.

Jeanne McCombs
Special Services Coordinator
Monterey Public Library
625 Pacific Street
Monterey, California 93940
Phone: 831.646.3949
FAX: 831.646.5618
Email: jmccombs@cl.monterey.ca.us

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[calix] Contra Costa County Library develops and launches a mobile patron support system

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Snap & Go! Contra Costa County Library develops and launches a mobile patron support system to support QR (Quick Response) codes.

Contra Costa County Library continues to expand its services to people on-the-go by providing mobile access to downloadable audio eBooks, podcasts, reading recommendations, library catalog and account information, and more through QR codes and a new mobile website. The website is part of the Snap & Go project which links customers with cell phones to library services and information.

With funding from a \$60,000 BALIS innovation grant, the Contra Costa County Library worked with a third party vendor, Qipiu Group, to engineer a mobile patron support system for pushing new and existing library content and services into the hands of the growing number of people who want to access library services on the go.

Read more... http://cccilib.org/press_releases/mobi.html



Susan Kantor-Horning Emerging Technologies Specialist Contra Costa County Library, CA skantor@cccilib.org cccilib.org

landryd@santacruz...

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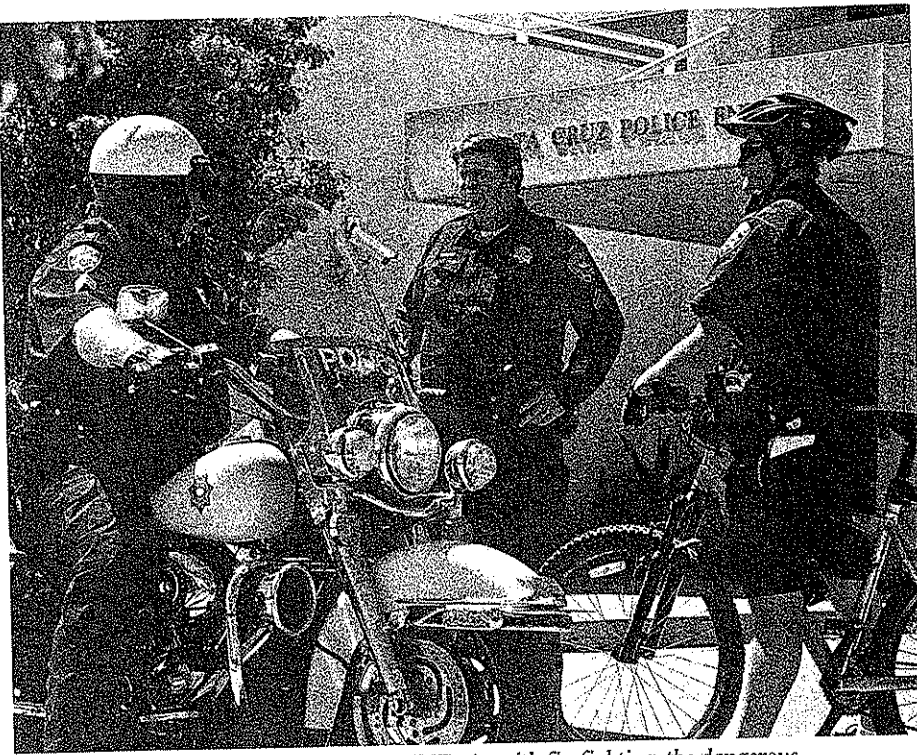
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Siskiyou County libraries face closure

The main library in Yreka, California, and its 10 small branches are threatened with closure as officials struggle to deal with a \$3.7-million budget deficit in this rural county that borders Oregon. The Siskiyou County Board of Supervisors is scheduled to vote on spending cuts June 15. Closing the libraries would save \$716,000. If it approves the cuts, the libraries would close by the end of June....

Modesto (Calif.) Bee, June 2

CURTIS CARTIER



SC'S FINEST AND MOST EXPENSIVE As with firefighting, the dangerous nature of police work has been cited as justification for generous retirement benefits. Those benefits are now coming under scrutiny.

Pension Tension

Santa Cruz spends 40 percent more than surrounding cities on public safety retirement

BY CURTIS CARTIER

SANTA CRUZ Police Chief Howard Skerry has worn SCPD blue for 29 years. So when he turns in his gun and badge in September to retire, he'll take home a pension of about \$170,000 per year for the rest of his life. It's the same deal every cop and firefighter in Santa Cruz gets: stay on the job until at least age 50, then retire with 3 percent of your salary for every year spent on the force. An officer with 20 years on the force would make 60 percent, one with 25 years would

make 75 percent, and so on.

The "3 percent at 50" retirement deal, as it's known, has been par for the course among California's public safety officers and firefighters since the prosperous 1990s. Today, Watsonville offers the plan, along with Monterey, Capitola, Scotts Valley, Alameda County, Santa Cruz County and about 320 other public agencies in the state. But with cities and counties statewide facing empty coffers and slashed services, local governments are left with little choice but to roll back the generous

packages they once used to lure the best. In Santa Cruz, those efforts are made that much more pressing by the fact that the city contributes about 40 percent more than each of the aforementioned neighbors (in one case, nearly twice as much) in order to offer the 3 percent at 50 plan. And with the city spending \$6.1 million on police and firefighter retirement plans last year out of a \$73.9 million budget, that translates into an extra \$1.8 million or so that Santa Cruz pays for the same thing other cities get—a sum that would fit snugly into the \$2 million budget hole city leaders are currently scrambling to plug.

City Manager Dick Wilson (also soon to retire, but at the "miscellaneous employee rate of 2 percent of his salary for each of his 28 years) says the model is "complete unsustainable."

"For cities especially, public safety is a substantial cost even in the best of times," says Wilson. "The pension and retirement costs are a huge part of that. The only real way to cut them down is for the employees to contribute more."

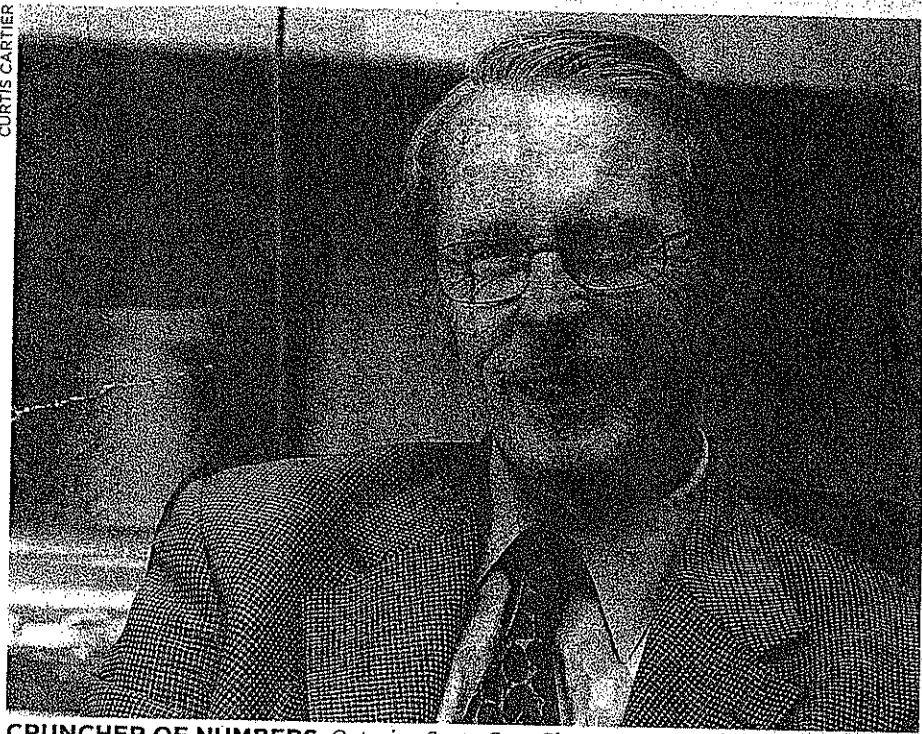
Cops in Rockers

The reason for the sky-high rates the city pays for its retirement plans is a bit of a mystery to many city officials, including Wilson and Mayor Mike Rotkin. But according to Finance Director Jack Dille the explanation lies mostly in the fact that Santa Cruz has more retired cops and firefighters than it has working ones.

Like the overwhelming majority of public employees in California, Santa Cruz city workers use the CalPERS pension and retirement program. Under the massive 1.6 million-member system, both employer (e.g. the city of Santa Cruz) and employee (e.g. Chief Skerry) contribute a certain percentage of the employee's salary into the program over the course of the person's career; when that employee retires, he or she stops being paid by the city or other public employer and starts being paid by the CalPERS system. CalPERS, in turn, analyzes what an agency's retirees are costing the system and bills each employer accordingly.

In Santa Cruz, the rates that employees pay into the program have been mostly stable at 9 percent, though the firefighters agreed temporarily to bur

Santa Cruz Weekly
June 16-23, 2010



CRUNCHER OF NUMBERS *Outgoing Santa Cruz City Manager Dick Wilson has been blunt about the need for pension reform.*

their contribution rates to 11 percent last year, saving the city \$123,432.

The rates that employers pay into the CalPERS system, however, are determined by a complex cost matrix, not the least important factor of which is how many retired employees there are versus how many are still working. Santa Cruz has 104 retired police officers versus 88 who are still working and 65 retired firefighters versus 52 still working. The effect is not unlike the dynamic that's crippling the nation's social security system, with a working few bearing the burden of an aging many. And because of this and other factors, the city pays 36 percent of each police officer's salary to CalPERS and 39 percent of each firefighter's. Meanwhile, Scotts Valley, Watsonville, Monterey and Capitola each pay about 26 percent.

John Bartel, an actuarial consultant hired by the city to analyze the employer contribution rates that Santa Cruz can expect in the future, says Dilles is correct in blaming a big part of the city's high contribution rates on its large number of retirees. He also offers a simple reason as to why there are so many of them.

"It's a byproduct of a mature city," he says. "Santa Cruz has been around a long time and city boundaries haven't grown, so a byproduct of that is that if you had 90 police officers 30 years ago you probably still have 90 today. This problem likely wouldn't happen in a city that is expanding."

Expanding the city being the last thing on lawmakers' minds, a majority of analysts seem to come back to Wilson's blunt assessment that employees will simply have to give up the 3 percent at 50 deal or cough up more of their paychecks.

"It's eventually going to come down to that," warns Wilson. "It's unfortunate, but necessary."

Two-Tier: Fears And Cheers

Much of last week, city leaders huddled with union reps, accountants and lawyers at City Hall in an effort to cut costs and keep the current \$2 million deficit from growing to \$3.7 million. On the table: more furloughs, deferred raises, cut hours—everything except pension and

retirement reform. "That," Rotkin says, "will come later."

When it does, there's no doubt it will be dominated by whether to include what's known as a "two-tier system" for all employees, public safety and otherwise. Under this plan, current workers would keep the retirement plans they've been promised, but new employees would begin to get skimpier offers. It would mean savings, but it would take decades to realize them, and members from labor groups like SEIU Local 521 and Association of Firefighters Local 1716 say it would devastate morale by creating two classes of employees.

"A two-tier system is a divide-and-conquer strategy where you'd have two groups doing the same job, one getting lower benefits," says Rob Oatey, president of the local firefighters union. (Full disclosure: Oatey is married to *Santa Cruz Weekly* graphic designer Jenny Oatey.) "We believe there are better and more immediate steps to take."

Wilson, nevertheless, argues in a letter to the City Council that "it would be unconscionable to leave the current (retirement) plans in place" and that advancing a two-tier system is imperative.

Rotkin also supports a two-tier system, though he goes one step further, saying the minimum retirement age for all employees should also be delayed by five years. It's currently age 50 for public safety workers and 55 for all other employees.

Both options have the potential to lower the city's employer contribution rates. Yet not all the city's workers have the

abnormally high rates that its public safety employees do. The city's 934 nonpublic safety employees—its maintenance workers, record clerks, IT specialists, attorneys, city manager, etc.—cost about the same as every other surrounding city's miscellaneous workers do. The city pays 12.8 percent of each employee's salary into the CalPERS fund; the employees themselves contribute 7 percent. The result is a rate of 2 percent of salary for every year of service, compared with cops' and firefighters' 3 percent. Yet by the sheer number of employees they represent, city leaders are still looking for major concessions from them as well, to the tune of \$1.3 million in cuts. SEIU members have been attending recent city meetings in full purple-shirt-clad force, asking that cuts be made "from the top" and not from the rank-and-file workers.

Whether any savings will come in the form of pension reform or not remains to be seen. And whether a left-leaning city like Santa Cruz has the political will to slaughter such a progressive sacred cow is certainly in doubt. But with a new forecast by Bartel himself saying that this year the city's employer contribution rates will climb from 36 percent for police and 39 percent for firefighters to nearly 44 percent and 48 percent, respectively, the penny-pinching city manager is now of the mind that reform is less of a choice than a necessity.

"Something has to be done," says Wilson. "Statewide reform is politically impossible. Local municipalities just have to do it themselves." ❧

Joyce Smith, Library Media Teacher

Dear Janis,

This is a very bittersweet newsletter for me. Three years ago I was so excited to be able to finally work at a school library in my own town, Santa Cruz. After having spent one and a half years commuting to Soledad and the five to Orinda, having a 3 mile commute was great. Not to mention the incredible library space, the superb staff, and the community support, both on campus and through the community's support of libraries with three parcel taxes.

Unfortunately, the state's economy has put a kink into the best laid plans of so many people. Next year SCCS will see the impact of reduced funding throughout the district's libraries. These cuts are affecting every level of library service in the district, and because of this, many staffing changes are being made. Elementary libraries will have 1/2 time Library Media Teachers. This means that your new librarian will be Kathy Griffith, currently at Bayview. I have been transferred to Harbor High to step into the very large shoes of Nancy Litvak who is retiring.

The cuts have also affected our support staff. Library assistants have been eliminated at the high school level, and because of seniority rules, Ms Brickman, sadly, will not be returning to the City Schools next year. Le Vu will be transferring to Westlake from Branciforte Middle.

I would like to thank you all for all your support for libraries and literacy over the years. Westlake's program is so wonderful because it is a community effort. You read with your families at night, you come to the library before and after school to check out books, you volunteers at book fairs and bring your families to special literacy events.

Special thanks this year go out to Miriam Greenberg and Bill Spencer. Miriam started dropping in to the library with her daughter Simona as soon as Simona began kindergarten. Sometime it would be 4 or 4:30 when they would be strolling through campus and drop in to curl up and read for 30 minutes or so. Bill and his son Eric have been regulars at the library researching their latest topic of interest. Together Bill and Eric they went to Sacramento this spring to talk with legislators about our state's education budget. Miriam and Bill went to the Board a few weeks ago to advocate for full funding of elementary libraries and to present the petition so many of you had signed. They both spoke passionately, and their efforts on behalf of all the elementary students in Santa Cruz are appreciated by all.

Budget battles will still need to be fought in the future, but I know, with your support, the role of libraries and teacher librarians will not be allowed to disappear.

Thanks you all. I will miss you and my Westlake family so much.

JUN 8 2010

Santa Cruz Public Library
Administrative Offices
224 Church Street
Santa Cruz, CA., 95060-3810

June 11, 2010

To whom, it may concern:

A note of thank you for the thorough, insightful and gracious assistance your wonderful service librarians provided.

I had many responsibilities on a particular project at Cabrillo College. Numerous complications arose but your staff members were, "dedicated soldiers" and saw me through; questions, service requests and various trials and the tribulations that evolved in those project weeks.

Fred Ulrich, is always my "go to" man when I'm confronted with project or inquiry. In this case, he became one of many, able minded, nimble problem-solvers. Donna, Sarah, Pam and Jennifer plus one volunteer librarian were all indispensable. Each of them demonstrated, in every way, exemplary capability and customer service.

Thank you, "the unsung heroes" of so many good works...for so many.

Yours truly,



Jane M. Mohnen

Live Oak Library
Branch Manager
Ms. Paula Contreras
2380 Portola Drive
Santa Cruz, CA., 95062

June 11, 2010

Dear Ms. Contreras,

Thank you, for all your time and considerations on behalf of our project team from Cabrillo College.

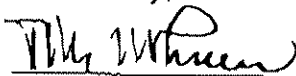
The written and verbal accounts of the **Live Oak Library** building project were invaluable. Additionally, know we sincerely appreciated your allowing us to tour and photograph the facility and grounds.

As in my project paper, "**Live Oak Library** may not have solar on its roof, or be LEED designated... maybe the question to answer is... Does the building meet the needs of the community, the people and the purpose it is to serve? It was the finding, the staff, the people served and the community in general responded in a resounding, yes."

The Live Oak Library as a building provides a place for children, teens and adults to be, to get "free" knowledge, and... grow. You and your staff guide that experience with grace, making sure everyone is safe, comfortable and feeling welcome.

Thanks for making the library a community success.

Yours truly,



Jane M. Mohnen



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Boston Branches' Reprieve Dimmed by Layoffs, Closures Elsewhere

By [Beverly Goldberg \(/users/beverly-goldberg\)](#)

Grassroots advocates in Boston were thrilled to learn June 21 that library officials were indefinitely postponing the closure of four branches that had been planned for months

<http://www.americanlibrariesmagazine.org>

[/news/06222010/boston-trustees-announce-closure-four-branches](#). The news came as hundreds of library workers at the Charlotte (N.C.) Mecklenburg Library and Los Angeles Public Library were coming to grips with layoff notices.



<http://www.ala.org/ala/conferenceevents/upcoming/annual/index.cfm>



<http://atyourlibrary.org>

"We've been listening to the community and we understand the desire for more planning time," Boston Public Library President Amy E. Ryan told an emotional crowd June 21 at a special board meeting called to announce that officials had changed their minds for the time being about closing [\(http://bpl.org/news/trustees062110.htm\)](#) four BPL facilities. Although Ryan emphasized that no dates had been set for the closings, the online news source Universal Hub reported June 21 that three of the four were originally slated to close at the end of the summer.

However, administrators still planned to eliminate 68 positions at BPL's Central Library as of October 1.

According to Citywide Friends of the Library President David Vieira, trustees said the postponement would give officials time to strategize with community members about how best to repurpose the branch buildings and "to talk to the community about which services are important to them" so they can make those resources available elsewhere. "It's a dispersal of services from one location to several alternate service points, but alternate service points do not a library make," Vieira told *American Libraries*, adding "I'm looking at this as hitting the reset button, and we'll start the community process all over again."

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Some state legislators seem to feel the same way: An amendment to the state budget bill requires that BPL keep all its branches open or forfeit all \$2.4 million it is slated to receive in state aid (National Public Radio's WBUR-Boston podcast (http://multimedia.boston.com/m/31917328/librarians-declines-delayed-but-state-funding-remains-uncertain?utm_source=librarians), 12:33).

Charlotte, Los Angeles regroup

With the same spirit demonstrated by Boston's library lovers, campaigns to stave cuts and/or reinstate services and jobs plowed ahead across the country despite what appeared to be irreversible decisions.

As Charlotte Mecklenburg Library officials warned repeatedly (<http://www.americanlibrariesmagazine.org/news/05222010/charlotte-mecklenburg-eyes-three-branches-excess-closures-again>) while seeking to plug a nearly \$18 million crater in the FY2011 library budget, decision makers shifted (<http://www.charlotteobserver.com/2010/06/10/15110637/three-branch-libraries-come-to-life.html>) three of the system's 24 branches indefinitely June 19 and closed a fourth until previously funded renovations are completed early next year. However, because an additional \$5.6 million was added to the budget (\$3.5 million from Mecklenburg County and one-time contributions of \$1.4 million from Charlotte and a total of some \$730,000 from five other service-area municipalities), the library was able to limit layoffs to 66 staff members instead of the 214 who were provisionally pink-slipped this spring.

The loss (PDF file (http://www.lapl.org/about/bk_agendas/20100610.pdf), page 8) of 328 FTE library positions in Los Angeles was quite a blow to supporters who, in the past few months, had organized read-ins around the city—including on the lawn of the mayoral residence—numerous rallies, and petitions and letters to municipal officials. Nonetheless, Mayor Antonio Villaraigosa stood by his austere budget proposals, which called for the dismissal of more than 700 city workers overall as part of an effort to save \$350 million for FY2011, and the city council approved the budget June 11. The library lost \$8.7 million.

LAPL spokesperson Peter Persic said that, of the library positions eliminated permanently, some 94 had been vacant and 107 were occupied by staff members who accepted an early retirement package, leaving some 150 library workers who were laid off with two weeks' pay effective June 18. Additionally, all 73 libraries will be open five days a week instead of six, with staggered Monday–Friday and Tuesday–Saturday scheduling to approximate six-day-a-week service throughout the city. Persic told *AL* that City Librarian Martín Gómez decided to “shrink everything” rather than eliminate service altogether in some neighborhoods. He went on to explain that L.A.'s chief administrative officer has projected a \$1-billion municipal deficit for FY2014.

Grassroots advocates have yet to give up the fight for full service, however. The Librarians' Guild, which is a chapter of the American Federation of State, County, and Municipal Workers, scheduled (http://www.sacethelibrary.org/latest_news/librariansguildactionmeetingsw/062210) an emergency strategy session for June 23. A few city council members also appear to be rallying round LAPL: According to the June 22 *Los Angeles Daily News*, the Arts, Parks, Health, and Aging Committee favors placing a \$39 library parcel tax measure on Los Angeles County's November election ballot. Should the full council approve the initiative, two-thirds of voters would have to okay the tax, which would generate \$30 million annually.

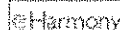
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Library sanctioned over budget cuts

Budget trimmed too deeply, state officials say

By Larry Sandler of the Journal Sentinel

Posted: June 22, 2010 | 31 COMMENTS

State and regional officials have hit the Milwaukee Public Library with sanctions for cutting its budget too deeply, library director Paula Kiely said Tuesday.

Under state law, municipal libraries that belong to federated library systems can't reduce their annual operating budgets below the average of the past three years. But Mayor Tom Barrett and the Common Council chopped 2010 property tax support for the library by \$1.2 million, and the library missed its state-mandated target by more than \$1 million, Kiely told the Library Board.

As in other city agencies, the library spending cuts were driven partly by a required \$49 million contribution to the city pension fund, after years when little or no employer contribution was required. About \$750,000 of that contribution covered costs for library employees, but the state didn't count that sum toward its required spending level, Kiely said in a Feb. 17 letter asking for a waiver of sanctions.

City unions also agreed to a wage freeze, saving about \$531,000, and to take four unpaid furlough days, saving \$252,000, and the state viewed those as spending cuts. But those reductions didn't result in service cuts, Kiely said in the letter to Richard Grob Schmidt, assistant state superintendent of public instruction.

But the library did cut services, by reducing hours in branch libraries and cutting its budget to buy books and other materials, Grob Schmidt noted in a May 7 letter denying the waiver. He said the requirement was designed to prevent libraries from shifting costs to neighboring communities.

The state Department of Public Instruction has blocked the city library from applying for federal Library Services and Technology Assistance grants for 2011. But the state won't ask the library to return the grants it has already received for 2010, Superintendent Tony Evers said in a May 24 letter.

In 2010, the library received two federal grants, totaling about \$32,000, library staffer Joan Johnson said. One grant paid for library staff to help patrons use computers to find jobs, while another covered costs of making some documents available on computers as well as paper, she said.

Also, on DPI orders, the Milwaukee County Federated Library System has cut off some consulting services to the city library. Kiely said she didn't expect that to have a significant impact.

For 2011, the library needs to increase spending by about \$100,000 over 2010 levels to meet the state goal, Grob Schmidt wrote. City officials hope to meet that target, but it's too early in the 2011 budget process to be certain, city budget director Mark Nicolini said.

Even if the budget situation improves, the city may not be able to restore the branch library hours that were cut, Nicolini said. He and board member John Gurda said the state had contributed to the budget problems by freezing state shared revenue to local governments.

In the long term, the library plans to consolidate its facilities by combining some branch libraries into new area libraries, noted Kiely and Ald. Ashanti Hamilton, the board's new president. That would allow the library to save money in a way that wouldn't bring further state sanctions, Kiely and Hamilton said.

State sanctions for library budget cuts are relatively rare. In an e-mail, DPI spokesman Patrick Gasper said the Menominee Tribal Library in Keshena was the only other one of Wisconsin's 385 libraries to face such sanctions this year. Before that, the Superior Public Library was the last one to miss its budget goal, in 2004, Gasper wrote.

But more libraries could find themselves in similar situations as budgets grow tighter, Kiely warned.

State law also restricts how much local governments can reduce police and fire spending.

31 Comments

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TooManyCats · Jun 22, 2010 12:34 PM

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Mr. Evers certainly does seem to be fond of restricting funding opportunities institutions who serve the disadvantaged. I can't help but wonder who pays for the books he reads.

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- 5:27 p.m. Edwards' child gave him up in double slaying
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Libraries report increased use of e-government, job resources; reduced operating hours

For Immediate Release
Mon, 06/21/2010 - 14:46

Contact: [Larra Clark \(/users/larra.clark\)](mailto:Larra.Clark@users.larra.clark)
Office for Research & Statistics (ORS)

Libraries report increased use of e-government, job resources; reduced operating hours

WASHINGTON, D.C. – A new report finds America's public libraries posted gains in several key areas of technology deployment. Libraries nationwide report they've seen an increase in public use of online services, particularly to support job seeking and e-government transactions, and have made some gains in adding public computers and improving Internet connections available to patrons. However, snowballing funding cuts at state and local levels are forcing thousands of libraries to literally lock away access to these resources as they reduce operating hours.

The national 2010 "Public Library Funding & Technology Access Study" provides data on job and career resources, as well as tracking a significant jump in e-government use. From unemployment benefits to state tax forms, more government information and services are moving online, often without a print alternative. Responding to growing demand from people for assistance using these new forms of government services, nearly 79 percent of libraries (up from 54 percent one year ago) provide assistance to patrons applying or accessing government services, according to the report released today by the American Library Association.

"Healthy public libraries play a vital role in ensuring digital opportunity for all," said ALA President Camila Alire. "This report is a message to elected leaders as they balance budgets: today's libraries are an essential service for accessing workforce and government services. Whether you are a laid-off factory worker using a computer for the first time or a tech-savvy entrepreneur using library databases for market research, libraries connect people of all backgrounds to the resources they need." One in five libraries are partnering with other government and non-profit agencies to provide e-government services.

Public access to these resources, however, is increasingly limited in many communities. Nearly 15 percent of libraries (or roughly 2,400 locations) report reduced operating hours, with urban libraries leading the trend with nearly one-quarter reporting fewer hours in 2009. More than half (55 percent) of urban libraries report funding cuts between FY2009 and FY2010.

Cuts come as the economic recession has placed libraries at the forefront for today's job seekers. Eighty-eight percent of libraries provide free access to job databases and other job services, and 67 percent report library staff helped patrons complete online job applications. Libraries also provide access to civil service exam materials (75 percent) and software to help patrons create resumes and other employment materials (69 percent).

"The local career center is overflowing, so they send people to the library. People are going to school as part of the displaced worker program. They need help registering and checking their grades. There is bigger and bigger demand," said Lexington-Henderson County (Tenn.) Everett Horn Public Library Director Dinah Harris. Nationally, 62% of unemployed people used their public library last year.

The 2010 *Public Library Funding & Technology Access Study* also finds that:



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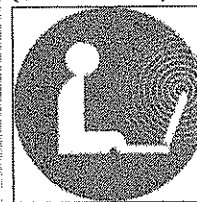
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- 67 percent of libraries report they are the *only* provider of free public access to computers and the Internet in their communities;
- Public computer and Wi-Fi use was up last year for more than 70 percent of all libraries;
- 89 percent of libraries provide formal or informal technology training, including classes in computer skills, software use and online job-seeking;
- 82 percent of libraries provide Wi-Fi access;
- A majority of libraries offer Internet services ranging from subscription databases (95 percent) to online homework resources (88 percent) to ebooks (66 percent); and
- 66 percent of libraries provide assistance to patrons completing government forms.

"Computer and Internet access at public libraries connects millions of Americans to economic, educational, and social opportunity each year, but libraries struggle to replace aging computer workstations and provide the high-speed Internet connections patrons need," said Jill Nishi, deputy director of U.S. Libraries at the Bill & Melinda Gates Foundation. "As demand for these services rise, public and private investment to support public access technology at libraries is more critical than ever."

Conducted by the ALA and the Center for Library & Information Innovation at the University of Maryland, the study provides a "state of the library" report on the technology resources brokered by libraries and the funding that enables free public access to these resources. The study features the most current national and state data available on technology access and funding in U.S. public libraries.

The study, funded by the Bill & Melinda Gates Foundation and the ALA, can be found online at www.ala.org/plinternetfunding (<http://www.ala.org/plinternetfunding>).

The American Library Association (ALA) is the oldest and largest library association in the world, with more than 62,000 members. Its mission is to promote the highest quality library and information services and public access to information. www.ala.org (<http://www.ala.org/>)

The Center for Library & Information Innovation at the University of Maryland (UMCP) develops, promotes, and supports innovative library and information services, practices, librarianship, and information professions through action research that focuses on the technology, information, policy, societal, and cultural contributions of libraries and information organizations (e.g., government agencies, health care organizations, educational institutions) to the communities and individuals that they serve. <http://cli.umd.edu> (<http://cli.umd.edu/>)

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people's health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington the foundation is led by CEO Jeff Raikes and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett. Learn more at www.gatesfoundation.org (<http://www.gatesfoundation.org/>) or join the conversation at Facebook ([http://www.facebook.com/home.php?fbid=](http://www.facebook.com/home.php?fbid=10151211481481481)) and Twitter (<http://twitter.com/gatesfoundation>).

Elk Grove Citizen ONLINE

NEWS

Local library shows off county's first automated sorter

Print Page

By Cody Kitaura - Citizen Staff Writer

Published: Thursday, June 17, 2010 4:23 PM PDT

The Elk Grove Library's newest employee is efficient, nearly silent, works all night without complaining, and cost a little less than \$400,000.

This week, library officials showed off their new Automated Materials Handling System, a large machine that checks in and sorts returned books by reading radio-frequency identification (RFID) tags inside the covers.

The machine pushes books down a series of rollers, and then drops them on one of six carts with similar titles.

Elk Grove is the first public library in Sacramento County to have an automated sorting machine. It was funded by city money that was leftover when the library's new building, located in Old Town Elk Grove at 8900 Elk Grove Blvd., was completed in 2008.



Photo by Cody Kitaura - Elk Grove Library Circulation Supervisor Mary Bragg looks on as a book travels down a series of rollers inside the branch's new automated sorting machine, which eliminates the need to sort returned books by hand.

Sacramento Public Library Authority Director Rivkah Sass praised the machine at the June 14 demonstration.

"Elk Grove is the site of the oldest free county library in California," Sass said. "It should be the site of firsts."

She said it has received a positive reception from employees and customers, and recalled a recent visitor to the library trying out the machine: a young boy and his mother.

"He was so excited, he said something like, 'Wow, this is great! Now we have to check out even more stuff!'" Sass said.

The sorter takes up most of a back room in the library, and visitors can feed books into it – one at a time – through a return slot outside the building. During the night and over weekends, the sorter continues to run. If one of its six sorting carts fills up, it automatically dumps books into an overflow bin.

Before the library received the machine last month, all this sorting was done by hand, and employees had to worry about repetitive stress injuries. Circulation Supervisor Mary Bragg said she had occasional pains while sorting and sometimes wore a wrist brace, but hasn't had to since the machine was installed.

Elk Grove Mayor Sophia Scherman, who sits on the Sacramento County Library Authority's board of directors, attended the demonstration and said she was "thrilled" to see the new sorter.

She watched intently as the machine tossed books onto various sorting carts.

"This is amazing," she said, stooping down to get a closer look at the process. "This is absolutely amazing."

During the demonstration, there was a slight hiccup – the machine needed to be restarted. A few moments later, it was up and running again, quietly humming away as Bragg fed books in.

Branch Supervisor Pat Sandefur said the sorter has a claimed capacity of 1,000 books per minute, but library employees haven't tested its real-world speed yet.

"It seems the books are getting on the shelves a lot faster," Sandefur said. "They go directly to the cart, (so) we're saving a lot of steps."

That leaves employees with more time to help customers, she said.

There's no shortage of visitors at the library, and the parking lot often fills to capacity. When the branch's renovations were completed in 2008, the amount of materials checked out jumped 65 percent, and cardholders increased 15 percent, executive assistant Brenda Haggard said in a later e-mail.

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Libraries fading as school budget crisis deepens

DONNA GORDON BLANKINSHIP
From Associated Press
June 24, 2010 12:34 PM EDT

BELLEVUE, Wash. (AP) — Students who wished their school librarians a nice summer on the last day of school may be surprised this fall when they're no longer around to recommend a good book or help with homework.

As the school budget crisis deepens, administrators across the nation have started to view school libraries as luxuries that can be axed rather than places where kids learn to love reading and do research.

No one will know exactly how many jobs are lost until fall, but the American Association of School Administrators projects 19 percent of the nation's school districts will have fewer librarians next year, based on a survey this spring. Ten percent said they cut library staff for the 2009-2010 school year.

A trip to the school library may be a weekly highlight for children who love to read, but for kids from low-income families, it's more of the necessity than a treat, according to literacy experts and the librarians who help kids struggling in high school without a home computer.

Unlike the overflowing bookshelves of wealthier families, 61 percent of low-income families own no age-appropriate books, according to a 2009 study commissioned by Jumpstart on "America's Early Childhood Literacy Gap." They depend on libraries to keep them from falling behind in school.

While the American Association of School Librarians says some states like California, Michigan and Arizona have been hit especially hard, a map of cutbacks on the organization's website shows jobs are disappearing across the nation.

"We're doing a disservice to our kids, especially those in poverty, if we don't have the resources they need," said association president Cassandra Barnett, who is also the school librarian at the Fayetteville, Ark., High School library.

Since few state or federal laws mandate school libraries or librarians, and their job losses are small compared with classroom teacher layoffs, library layoffs may seem minor to some observers. But librarians say few administrators or parents understand how involved they are in classroom learning and school technology.

"We have really cut off our noses to spite our face because we are denying access to the very resources we say our kids need," Barnett said.

Rosemarie Bernier, president of the California School Library Association, says she doesn't know how students doing complex online research projects could complete their assignments without the guidance they get in school libraries.

"The people who control the purse strings are out of touch. They don't understand what the kids really need," said Bernier, who is the librarian at Hamilton High School in Los Angeles.

She spoke of a student with a first period English class who came to her in tears because she didn't have enough time to transfer and reformat the essay she had written on her cell phone. Since she doesn't have a computer at home, the student's cell phone is her only hope of completing assignments that need to be typed.

The number of California school libraries that won't have teacher librarians next year is changing daily, but she says many students will be surprised next fall when they find their school library closed or staffed by someone who can check out books but not help them with their school work.

Los Angeles eliminated all its elementary school librarians a few years ago and has left next year's staffing of middle school libraries up to the schools. Of 77 middle schools, about 50 have found the money to pay for a teacher librarian, according to Esther Sinofsky, who is in charge of libraries for the district.

Sinofsky, a former school librarian, says Los Angeles Unified School District recognizes the connection between student achievement and school libraries, but the district is also struggling to close a \$640 million budget gap for the 2010-2011 school year.

Teacher-librarians have been disappearing from Michigan schools gradually over the past decade, with a drop of nearly 1,500 to not quite 500 since 2000, according to Tim Staal, executive director of the Michigan Association for Media in Education.

Those who remain are doing the jobs done by two or three people a few years ago.

Gigi Lincoln, the librarian at Lakeview High School in Battle Creek, Mich., since 1973, was told she would have to leave the library and start teaching French because the district needed to make drastic cuts in the middle of the school year.

Lincoln, who was honored in 2008 by the American Library Association with one of just 10 national "I love my librarian" awards, hasn't taught French since 1972, when she and her husband were living in Australia.

"That was a real wake-up call," said Lincoln, 61, who called the ALA for help and managed to keep her job. Now she's working part-time at two school libraries and says she will do her best to do more than just check out books.

Even wealthy Seattle suburbs have identified the library as a target for budget cuts so they could avoid increases in class sizes.

Sandy Livingston retired this year after the Bellevue School District eliminated all its high school and middle school librarians.

"Information literacy is just so important for kids to be more successful in college," said Livingston, 66, who worked in the Sammamish High School library for about a decade. "The kids are being hurt."

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OverDrive to Add Disney Digital Books to Catalog for Libraries

First-ever access to Disney Publishing Worldwide's vast online collection of over 600 books via OverDrive-powered library websites

Company Information

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News

(Cleveland, OH) - June 29, 2010 - OverDrive (www.overdrive.com), the leading global distributor of eBooks, audiobooks, and digital content to libraries and schools, today announced a preliminary agreement with Disney Digital Books (www.disneydigitalbooks.com) that will enable libraries to offer access to Disney's comprehensive library of books online. Young library patrons and their parents will be able to enjoy-for the first time-unlimited access to over 600 new and classic Disney books for kids of all ages with just an Internet-connection and library card. The extensive library features hundreds of digital books available at the click of a mouse, including favorites from popular Disney franchises such as Mickey Mouse, Toy Story, Disney Princess, Cars, and Hannah Montana, along with many other classic and contemporary Disney stories.

To see if your library is a member of the OverDrive network, visit <http://search.overdrive.com>.

"Disney Digital Books subscriptions allow libraries to provide instant, simultaneous access to Disney's magical reading experience through their existing OverDrive-powered website," said Erica Lazzaro, licensing counsel for OverDrive. "This interactive, browser-based service is the first multimedia offering of its kind for libraries and will enable them to reach more young readers with premium content."

"Disney Digital Books takes innovation and technology and merges it with Disney characters and stories for a revolutionary experience," said Yves Saada, vice president, Digital Media, Disney Publishing Worldwide. "We are thrilled to help libraries continue to provide children with new ways to experience books and foster a love of reading."

Disney Digital Books is an innovative way for children to experience the joy of reading in a robust and safe online environment. The site offers children of all ages, reading levels, and interests a broad selection of books and features including Look and Listen titles that allow children to hear a story read aloud; a Story-Builder feature so kids can create and share their own stories; and an age-appropriate dictionary that lets children click on any word to hear it read aloud, select unfamiliar words, and read simple definitions.

Libraries will be able to add a subscription to Disney Digital Books using their OverDrive Content Reserve (www.contentreserve.com) account. Users will authenticate on the existing OverDrive-powered library website, and then the Disney Digital Books website will launch in their browser. The service is PC and Mac® compatible and does not require a download.

OverDrive provides digital distribution services for more than 10,000 libraries, retailers, and schools worldwide with support for Windows®, Mac, iPod®, iPhone®, iPad™, Sony® Reader, nook™, Windows Mobile®, Android™, and BlackBerry®. To see if your public library is a member of the OverDrive network, visit <http://search.overdrive.com>. OverDrive also operates the Digital Bookmobile (www.digitalbookmobile.com), a high-tech 18-wheeler traveling North America on behalf of public libraries to raise awareness about free library downloads.

About OverDrive

OverDrive is a leading full-service digital distributor of eBooks, audiobooks, music, and video. We deliver secure management, DRM protection, and download fulfillment services for hundreds of publishers and thousands of libraries, schools, and retailers, serving millions of end users. OverDrive has been named to the EContent 100 as a company that matters most in the digital content industry. Founded in 1986, OverDrive is based in Cleveland, OH. www.overdrive.com

About Disney Publishing Worldwide

Disney Publishing Worldwide (DPW) is the world's largest publisher of children's books and magazines, with over 250 million children's books and over 400 million children's magazines sold each year. Disney Publishing Worldwide consists of vertically integrated publishing imprints including Disney Book Group in the U.S., Disney Libri in Italy and Disney Libros in Spain as well as an extensive worldwide licensing structure. DPW also publishes a range of children's magazines globally including *Topolino*, *Le Journal de Mickey* and *Donald Duck* as well as family titles in the U.S. which include *Disney FamilyFun* and *Disney en Familia*. Disney English is DPW's English language learning business, including Disney English schools in China and a worldwide retail licensing program. Headquartered in White Plains, NY, Disney Publishing Worldwide publishes books and magazines in 85 languages in 75 countries.



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Libraries Reach FY2011—Some Relieved, All Wary

By [Beverly Goldberg \(/users/beverly-goldberg\)](#)

The FY2010 roller-coaster ride is just about over, and many a library advocate is undoubtedly glad to see the back of it. There's a curious symmetry about the timing: Thousands of tenacious front-line library supporters are taking stock of their finalized local budgets even as a swarm of library boosters descended <http://www.americanlibrariesmagazine.org/ala-members-blog/library-advocacy-day-2010> on Capitol Hill June 29 to speak up for full library funding at the federal level—with another 1,061 making themselves heard online.

New York Public Library staff members heaved a sigh of relief June 24 with the announcement that the system had dodged a catastrophic \$37-million budget cut. "You spoke out loud and clear," read a poignant thank-you message on the NYPL website. The open letter credited "the 130,000 who wrote letters, donated more than \$144,000 online, called elected officials, and raised their voices on the steps of City Hall" with convincing Mayor Bloomberg and the City Council to restore enough funding to ensure five-day-a-week service. [Queens Library \(http://www.queenslibrary.org/index.aspx?page=am=Frontline+Library+Service+Outbacks\)](http://www.queenslibrary.org/index.aspx?page=am=Frontline+Library+Service+Outbacks) offered public thanks to elected officials and supporters alike for restoring \$17 million to the budget, thus "making libraries a priority, for ensuring every one of our libraries remains open an average of five days a week." A pragmatic Brooklyn Public Library indicated nothing as of the evening of June 28, maintaining its ["save the library \(https://bkl.brooklynpubliclibrary.org/04-en/\)"](https://bkl.brooklynpubliclibrary.org/04-en/) web page. Among the variables still in play is the amount of state aid public libraries will receive; a contentious struggle at the state capitol makes the outcome anyone's guess.

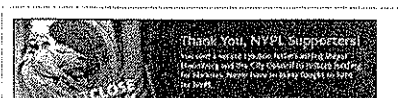
The New Jersey Library Association heralded <http://save.njpubliclibrary.org/content/all-library-supporters-who-made-your-voices-heard> a budget agreement between Gov. Chris Christie and the legislature that restores FY2010 funding levels for resource sharing and the New Jersey State Library. "We can breath a sigh of relief, but it doesn't mean it won't happen again next year," NJLA Executive Director Pat Tumulty said <http://blogs.njla.org/> in the June 24 *Vineland Daily Journal*. Instead of suffering a \$10.4-million cut, New Jersey's public libraries are counting themselves lucky to contend with a \$6-million reduction. And even though Gov. Christie signed the state budget June 29, many community libraries are vulnerable to the fiscal woes of their municipalities and a 2.9% annual property-tax cap. However, a bill that passed the state senate unanimously June 28 may offer some hope; if enacted, [S. 2068 \(http://www.factcheck.com/2010/06/28/nj-senate-passes-property-tax-reform\)](http://www.factcheck.com/2010/06/28/nj-senate-passes-property-tax-reform) would give municipal libraries a dedicated line on property-tax bills and remove them from the cap.

While New York and New Jersey libraries (as well as those in [Boston](#), [Los Angeles](#), [Charlotte](#), <http://www.americanlibrariesmagazine.org/news/06222010/boston-branches-repair-ve-dimmed-lights-closures-elsewhere>) and countless points inbetween), have fought off draconian cuts for months, South Carolina's library community had a narrow window of opportunity to win an override of Gov. Mark Sanford's devastating veto of \$4.65 million in state aid and \$1.172 million in stimulus funds for public libraries. However, State Librarian David Goble [marshalled \(http://www.statelibrary.sc.gov/read-state-library-directors-response-to-governors-veto/\)](http://www.statelibrary.sc.gov/read-state-library-directors-response-to-governors-veto/) advocates through traditional and social-network channels, and they connected with lawmakers so persuasively that Sanford's veto was overturned five days later.

American Libraries, Wed, 06/30/2010 - 04:17

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MONTHLY REPORT FOR MAY 2010

1. Reading, Listening and Viewing for Pleasure

A. Children in Santa Cruz County will enter school ready to read, write, listen and learn.

- Jeanne OGrady, Outreach Services Librarian, did four Raising a Reader programs this month – 2 at Branciforte with great support from B40 staff and 2 at Redwood Mountain Preschool in Felton. Most of the Raising a Reader groups come to the Live Oak branch where Heather Norquist has hosted 6 classes in May in addition to the 4 classes she hosted in April. Many thanks to Live Oak staff and Kathleen Frey in Outreach for processing library card applications for these new users (an average of 18 applications per group). The library visit is a very important component of Raising a Reader. We have noticed many young children coming into our branches and onto the Bookmobile with their purple RAR bag for regular visits. They are becoming lifelong library users at a very young age and they are bringing their families into the library as well.
- Jeanne taught the SEEDS classes for daycare providers and teachers at Cabrillo and the Watsonville extension. Topics included the 3 different types of Read to Me kits and how to use them with very young children as well as some basic tips on library use and early literacy development.

B. All ages will have materials, programs and displays that reflect current community interests and provide pleasurable reading, viewing and listening experiences that help them reach their personal literacy goals

- The Friends of the Boulder Creek library hosted Shakespeare to Go, an abbreviated version of the play Love's Labours Lost. It was performed by drama students at UCSC. The community of Boulder Creek appreciated this opportunity to experience Shakespeare in an intimate setting. Some children left claiming their love of plays.
- Heather Norquist and Emily Galli represented the library at the Del Mar School Garden Festival. About 50 children and their families received information about the Summer Reading program while making bubbles from Heather's special bubble juice.
- The Library Hours have been going very well. At Via Pacifica the daughter of one of our former patrons comes in to check out books for Allen. He had been an avid reader for all of the years we have been there (about 10) and had to move in with his daughter and her family this year as his health declined. She decided to still come and check out books for him here, as she lives nearby, and is able to keep us informed of his wellbeing. We appreciate the updates.
- Bobbi Wolner, Outreach Services Librarian, is always amazed at the La Posada patrons. We have patrons who are nearing the century mark in age and one, whose eyesight is poor, has now switched to books on CD and is happy to still "read" her books. One of our patrons shared that she is the youngest in her Bridge group, at 90+. Many still visit B40 when they are able and come to the Library Hour as well.
- This month Bobbi & Eric Chalfant, Bookmobile Library Assistant, learned that one of their favorite patrons at Santa Cruz Skilled Nursing had died. The only way they discovered this fact was seeing her obituary in the Sentinel. They had first met Simone at

Sunshine Villa while doing a Lobby Stop. When she moved to SC Skilled Nursing they were still able to deliver to her. Simone had been an artist and liked to have well illustrated books about artists and books to help her regain her ability to draw (she had had a stroke among other health issues and wanted to regain some of her former ability.) She loved to have visitors and was usually smiling and glad to see us. Since she was often in great pain this was not easy. Both Eric and Bobbi enjoyed stopping by and will miss her.

C. People of all ages will have friendly support and intuitive access to the materials and resources they want

2. LIFELONG LEARNING

A. People will have access to a relevant collection of resources in diverse formats for all ages.

B. Library users will have access to innovative and successful programming which reflects the cultural, educational and informational needs of the diverse communities served by SCPL and which will help learners of all ages to achieve their goals.

C. People will have access to innovative technology and the tools necessary to find, evaluate and use information and resources to meet their learning needs.

- 84% of check outs in Live Oak in May were through the self check machines. Kudos to staff who are working hard to make this happen.

3. COMMUNITY CONNECTIONS

A. The Library will initiate and nurture partnerships with the public, private and nonprofit sectors in Santa Cruz County for the mutual benefit of the partners, the Library and the community.

- Anna Cvitkovic began her internship at the Central Library. Anna is a MLIS student at San Jose State and brings many talents to us including being trilingual in English, French, and Spanish as well as fresh knowledge of new technologies for libraries.
- Lynette George, Library Assistant, North County, had a booth at the Boulder Creek Elementary carnival. We promoted Summer Reading and “You too can have library card”
- Outreach line rings Sat am. A quavery voice says, “I’m in the hospital. I was hit by a car...” I assume that this a patron calling to ask us to hold her requests or excuse late returns; but no; what this woman wants to know is how she can find out the names of the officers who took the accident report. She’s already discovered that the PD’s front desk is closed on Sat., & she’s worried that calling 911 isn’t appropriate. Recalling our briefing by Lt. McMahon, I assure the woman that calling 911 to track an incident won’t get her into trouble. She thanks me — & the library — profusely: “You’ve been so helpful,

everyone at the library is always so nice.” Our partnership with the PD isn’t only about our safety; partnerships make us better informed and thus better able to serve our patrons.

- Gale Farthing, Outreach Services Manager and Leslie Auerbach, Outreach Library Assistant, met with Cabrillo stage staff Jon Nordgren, Producing Artistic Director, Jana Marcus, Marketing and Communications Director, & Stephanie Gelman-Peck, Planning and Development Coordinator, to work out more details of our new partnership. Jana Marcus offered a half-ad space in the Cabrillo Stage playbill to advertise SCPL, and came up with a terrific slogan: “Support our libraries. Libraries support the arts for future generations.” Janis O’Driscoll, Manager Programs and Partnerships, supplied Jana with our “transform lives and strengthen communities” statement. With these, and the library’s logo, Jana created a splendid ad. Cabrillo Stage is also furnishing several adult summer reading prizes. This Fall, we’ll be working with Stephanie on cooperative grant-writing possibilities.
- In support of this partnership, workers at Aptos led by Laura Vanderslice, Library Assistant, have created an eye-catching display of books, scores, and visual media related to Cabrillo’s major summer productions, Swing! and Cabaret.
- Live Oak Branch had Scott, from Workability Program help with repackaging the DVD collection.
- Also, Community Action Board worker Megan Shutz worked at Live Oak for several weeks with search lists, sends lists and helping to sign on children to computers.
- Sandi Imperio, Teen Librarian, submitted a list of 22 local businesses that have supplied gift certificates and/or prizes for teen summer reading raffle prizes. The full list is included in the Board packet.
- The Library hosted the quarterly City of Santa Cruz supervisors and managers meeting. It was Dick Wilson’s last such meeting so a special tribute was made.

B. People will strengthen their ties with each other, the community and the library.

C. The community will recognize the value of SCPL in improving their lives and will recognize SCPL as an asset to their community.

- Garfield Park received a second lemonade stand donation from two young neighborhood girls wishing to help the library.
- At a dinner function, the Library Director was told the story of a grandmother who brought her visiting 3 year old granddaughter to the library. On her next visit her first choice was to go to the library but they could not because it was closed. (This was the Central Library).

D. Volunteers will be used effectively

- Dana Mckenzie, longtime Aptos Chess Master and new volunteer, Shan Crockett, ably led the well-attended Aptos Chess Club's annual tournament for young people ages 6 and up. This program challenged each player to exercise many skills besides their chess acumen. While friends, family and interested onlookers observed, the competition burned into high gear with parents and friends resisting all impulses to cue or advise from the sidelines. A quiet settled over the group as each player followed directions. They were patient, sportsmanlike, and respectful, or were learning to be so: One player in the lower-age division wanted to do a running commentary on each move he made. Once our enthusiastic player understood Dana's explanation of how to more fully respect fellow players, our young player soon came to the point of capturing his opponent's queen. Trying with all his might, the excitement momentarily bubbled over as he waved vigorously to get the attention of the Chess Director who noted him standing quietly celebrating by whirling the piece over his head. Each game played, our exemplar grew more aware of the other players and blossomed as he placed well in the competition in more than one way.
- Several young volunteers have been trained to mend and repair materials for Central YP. They have also been assisting other branches by preparing die cuts for summer reading.
- The request for volunteers to be guest storytellers at the Dia program at Whole Foods Market was resoundingly unsuccessful. Staff manned the booth the whole day with very low turnout. Unfortunately, the event was scheduled for the Saturday before Mother's Day and it turned out to be the first really beautiful spring day of the year.
- Phil Shima has come on a regular basis to rebarcode all returned and reassigned items.. He comes at lease once a week. We are very appreciative of his help-Live Oak
- Annette Zadok, Maggie Murakami, Annette Zadok. Kitty Hawker come on weekly basis to teach and help patrons with the Self Check-Out Machines. Live Oak.
- Sharon Yamanaka takes care of all the plants here at Live Oak, and has brought added some beautiful plants to this Branch. Sharon, on a monthly basis, counts all money donations, booksale money and book bag money and sends to the Friends. She sent in a total of \$178.00.

4. WELCOMING PLACE

A. Identify the physical changes and funding required to provide 21st century library facilities.

- Teresa Landers, Library Director, accompanied the task force charged with exploring the construction of new library in Capitola, on a tour of two San Jose branches and the Redwood City branch in San Mateo. They learned a lot about the changes libraries are experiencing and came away with a new appreciation for what is possible.

B. The virtual branch meets the definition of a welcoming place

C. People receive service at the level they need and want

- On Thursday, May 27 the BKM made its usual stop at Dominican Oaks. It began to rain as we were setting up so we put the table, with its selection of large print titles, under the overhang by the front door. As people came out, they stopped to see the offerings. Most were not dressed for the rain so Eric and Bobbi set up a system to ferry books to be returned to the BKM and the requests came back to the front door. Over 40 people appreciated being kept dry as the intrepid team splashed to and from the BKM. It was a fun way to offer service.

5. FINANCIAL SUSTAINABILITY

A. The Library System maintains a healthy and stable financial position

B. There is adequate, stable and diverse funding to finance ongoing operations, key strategic initiatives and capital projects.

C. Services of a defined level and quality are consistently delivered based on revenue projections and supportive organizational and operating structure.

D. The Library operates efficiently and focuses on continual improvement.

- Access Services is working with Library Management to explore various ways of achieving system-wide efficiencies.
 - We are now considering the centralization of periodical processing. Currently, periodicals are delivered and processed independently at each of the 11 library sites, resulting in duplication of effort, inconsistencies in holdings information, and redundancies in staff time and labor. While centralizing the processing of periodicals would require that a staff position(s) be dedicated to this function, this method would provide consistency in serials cataloging, inventorying, and claiming of missing issues.
 - Access Services is studying how many gift books are added to library collections, either as added copies or new additions (we don't own a copy) for June, July, and August. We are also continuing to look at a recently completed workflow analysis to help us decide how cost effective it would be for our system to expand preprocessing of purchased materials.

- An Admin Staff member helped Access Services Staff by compiling and cataloging replacements for damaged audio, making the task of repairing our popular books on tape more efficient and economical.

6. ORGANIZATIONAL READINESS

A. Staff receives adequate training to do their jobs effectively.

- About 90 staff attended “Staff Day.”
- Live Oak staff participated in a Webinar “Best Practices For Successful computer literacy workshops for adult Spanish learners.”

B. SCPL is committed to developing current library staff to become tomorrow’s library leaders.

- Teresa Landers, Library Director, was elected to the Executive Committee of the Pacific Library Partnership which is a consortium of libraries from the Bay Area to Carmel.

C. Employees have the skills to execute change and are committed to change and continual improvement.

D. A customer driven service philosophy guides staff training and development.

Google docs Teen SRP raffle prizes

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	A	B	C
	Business	City	Notes
2	Bed, Bath & Beyond	Capitola, CA 95010	\$20 Gift Card
3	Bill's Wheels Skateshop	Santa Cruz, CA 95062	Surprise Package
4	Blind Pilot Jewelers	Boulder Creek, CA	Surprise Package
5	Bookshop Santa Cruz	Santa Cruz, CA 95060	\$20 gift certificate
6	Borders -- Capitola Mall	Capitola, CA 95010	
7	Borders Books, Music & Café	Santa Cruz, CA 95060	unspecified lottery prize
8	Cali Style	Scotts Valley, CA 95066	t-shirt
9	Chill's	Capitola, CA 95010	5 \$5 coupons
10	Choi's Tae Kwon Do--Kings Village Shopping Center	Scotts Valley, CA 95066	2 gift certificates for Intro program, private lesson, 4 wks of classes & uniform
11	Coffee Cat	Scotts Valley, CA 95066	\$10 gift card
12	Comicopolis	Santa Cruz, CA 95060	gift certificate
13	Dharma's Natural Foods Restaurant	Capitola, CA 95010	\$25 gift certificate
14	Family Cycling Center	Santa Cruz, CA 95062	Bike Lock
15	Freeline Design	Santa Cruz, CA 95062	2 gift certificates for board & suit rental (need ID & Credit Card Deposit)
16	Great Clips--Brown Ranch Marketplace	Capitola, CA 95010	free hair cut
17	Hat Company of Santa Cruz	Santa Cruz, CA 95060	3 hats
18	Jamba Juice	Capitola, CA 95010	3 gift cards for 16oz smoothie
19	John Elphege La Riviere Stamp & Coin	Santa Cruz, CA 95062	6 mint coin sets & \$16 postage for postcard program
20	Kianti's	Santa Cruz, CA 95060	\$25 gift certificate
21	KidsArt	Scotts Valley, CA 95066	gift certificate for 1 month of art classes
22	Kurios	Santa Cruz, CA 95060	2 \$25 gift certificates
23	Loans Books & Records	Santa Cruz, CA 95060	

Sheet1

> Business

Raffle Prizes for
Teen Summer
Reading Program

MONTHLY REPORT FOR JUNE 2010

1. Reading, Listening and Viewing for Pleasure

A. Children in Santa Cruz County will enter school ready to read, write, listen and learn

As of 6/30 we've had 453 children sign up for summer reading at Central, and the system total is 2101. During the first week staff reported that they needed between 3 and 4 staff members to handle the signups.

Summer Reading in Outreach is off to a booming start. We registered 39 kids at 10 bookmobile stops in the first 2 weeks of summer reading. In addition, we have partners at San Andreas, Via del Mar, Parkhurst, VDP, Neary Lagoon, Davenport, and Beach Flats who are integrating the summer reading program into their summer programs. We will be adding sign-ups from all those sites as we get them. Jeanne O'Grady, Outreach Librarian did summer reading orientations for the programs at Neary Lagoon, Beach Flats, and Davenport and will return to each of those sites the last week in July to celebrate the end of summer reading and give them the summer reading dollars they have earned. She hosted a class visit for kids from Neary Lagoon at Central and outreach processed library cards for those 6 children. She also hosted a class visit at Central for kids from Davenport. Jeanne planned the annual shopping trip for the readers at Jardines del Valle for early August. This is a much anticipated trip to spend SR dollars and some of the children have gone every year for 9 or 10 years.

Only one family came to the Whole Foods storytime the month. However they signed up 4 children for Summer Reading and went directly from the storytime to the wonderful Bubble Man Show at Capitola Branch.

Jeanne and Janis O'Driscoll, Programs and Partnerships Manager had a table at the Felton Farmer's Market annual Children's Day. They spoke with over 50 people about the library and summer reading and signed up 12 children for summer reading.

A group of English Language Learners working on reading skills in English and Spanish at Del Mar Elementary this summer came to the Live Oak branch to learn about the library and our Summer Reading Program. All 12 of the children signed up.

B. All ages will have materials, programs and displays that reflect current community interests and provide pleasurable reading, viewing and listening experiences that help them reach their personal literacy goals

Brent Gifford, also known as the Great Blindini, performed at the Branciforte branch. His performance drew 32 children and 15 adults, all of whom enjoyed Blindini's feats of legerdemain. Yankee, the Great Blindini's exceptionally friendly guide dog, also elicited lots of smiles and interest among the show's early arrivals.

We had displays for World Soccer, Pirates, Ocean Life and Seabirds at Central. All ages have been using our science table to measure everything they can get their hands on.

Jeanne met with Vicki Boriack of First 5 to discuss the scope of work and budget for the 2010-2011 grant. We had thought we would not be able to keep the Read to Me storage unit for the next fiscal year but First 5 surprised us with a grant to pay for the rent.

At LO, Lois Meyer, Library Assistant, and her children installed a display of their rubber ducky collection (over 100 different ducky personas) along with summer reading materials to promote the "Make Waves at the Library" theme.

Other displays at LO, include summer reads and staff picks in support of the Summer Reading Program for adults along with the "More Perfect Union" display in observance of the 150th anniversary of the Civil War.

C. People of all ages will have friendly support and intuitive access to the materials and resources they want

4:55pm 6/24/10 The Outreach phone rings. An older woman's voice, a bit quavery: "This is X at Dominican Oaks. I'm calling for 2 things. One is to thank you for your selection; you brought me particularly wonderful books today." Her other question is about renewing a book. That matter quickly settled, she returns to praising our service. "It works so well, bringing my books to the desk." She's a bit frail, it seems, and walking all the way to the bookmobile can be difficult. Outreach staff often leave books at the front desk at retirement homes and nursing facilities; or, indeed, run books up to a patron's room. As for an artfully chosen selection of books & audiobooks; well, that's our pleasure. But it's an extra pleasure when a generous patron shares her delight with us. (Plaudits to Eric Chalfant & Bobbi Wolner, who were on today's Dominican Oaks run.)

2. LIFELONG LEARNING

A. People will have access to a relevant collection of resources in diverse formats for all ages.

B. Library users will have access to innovative and successful programming which reflects the cultural, educational and informational needs of the diverse communities served by SCPL and which will help learners of all ages to achieve their goals.

The Library program "Be Water Wise and Protect Our Water Resources" on June 23 was the first Adult Summer Reading program planned for the Aptos branch this summer. Choosing landscape and gardening plans that use water wisely in the garden was the subject of a presentation by Vai Campbell of the Soquel Creek Water District. She

demonstrated a new web site which has been compiled by a consortium of water districts in the Santa Cruz area, watersavingtips.org. She also discussed rebate incentives available for residents who reduce their water use by changing their lawns to hardscape materials and using devices such as hose nozzles, water timers and other aids to prevent drips and water leaks at home. Will Meyers of the Hidden Gardens Nursery in Aptos completed the program with a selection of drought tolerant plants from his nursery which require little or no water after planting. Both Vai and Will answered questions from the audience during their very informative demonstrations. After the program, a reporter from the KION television station conducted interviews with the two guests for a segment which was later broadcast on the evening news. At the Live Oak branch, we've had record attendance at the special programs funded by FOSCPL, with The Bubble Man and Blindini both drawing over 100 people. In June, 565 children and their families attended programs at LO.

C. People will have access to innovative technology and the tools necessary to find, evaluate and use information and resources to meet their learning needs.

3. COMMUNITY CONNECTIONS

A. The Library will initiate and nurture partnerships with the public, private and nonprofit sectors in Santa Cruz County for the mutual benefit of the partners, the Library and the community.

Live Oak (6/21) 3:00PM - (6/28) 11:00AM-Ecology Action has set up a table with this information: *Engaging Santa Cruz Public Library Visitors to Vote for Natural Environment Priorities*

Ecology Action is again leading the effort to help the community set goals for the Natural Environment Chapter of the Community Assessment Project for the years 2010-2015. We have a short list of goals that was developed and vetted by our Collaboration list serve of local environmental agencies/orgs and are now taking it to the streets.

Janis, Gale Farthing Outreach Supervisor and Jeanne attended a workshop on Inspiring Visitor Participation at the Museum of Art and History. It was a collaborative project jointly sponsored by the library and the museum. The speaker was Nina Simon, who lives in Santa Cruz, but works with institutions all over the world. The workshop was fun and valuable. A reception for Nina and her book, *The Participatory Museum*, was held at the library in the evening.

Gale met with Ben Radosovich, a UCSC intern at 7th Avenue Center, regarding a possible partnership with their program. The 7th Avenue Center is a residential center for individuals with serious and persistent mental illness. So far nothing has come of it, but perhaps we will hear more when UCSC starts the program again in the fall.

Heather Norquist, Live Oak Youth Services Librarian, e-mailed the principals of all the schools in the Live Oak School District asking if they would like SRP bookmarks to distribute to their students. The principals at Shoreline Middle School and Del Mar Elementary replied "yes!" SRP participation is up from last year at both of those schools.

B. People will strengthen their ties with each other, the community and the library.

The Library Bookcart Precision Drill Team participated in the Santa Cruz Pride Parade on June 6th. Parade organizers did not know what to expect, but the team, comprised of staff and volunteers, enthusiastically performed their routines led by a roller skating roller queen who is a library school intern this summer. The group received thunderous applause.

Our Sunday Drop-in Family Craft time has been popular at LO. It has been especially fun to watch fathers enjoying the time making craft projects with their children.

C. The community will recognize the value of SCPL in improving their lives and will recognize SCPL as an asset to their community.

D. Volunteers will be used effectively

Heather Pereira, new Branch Manager for Capitola and La Selva Beach trained two volunteers for La Selva Beach new Self Check System at Live Oak and the pilot project began on June 22.

Gail Paynter is training Molaan Moselle, who volunteers as Self Check greeter to help with many book donations. In addition to coming once a week to help with Self Check, she will also come once a week to work on book donations.

Bobbi Wolner, Outreach Librarian met a new homebound BookBuddy in early June who has been published in the Porter Gulch Review for 2010. Bobbi matched her up with one of her long-time volunteers who also happens to be a visiting nurse. Bobbi introduced them and both noticed that Alissa is becoming more forgetful. They will have to watch to try to figure out what to do.

Bobbi interviewed a new volunteer BB who had seemed enthusiastic but hard to reach. After explaining exactly what the volunteer job entailed, Laura realized it was more of a commitment than she could make at this point (she had been unemployed and has taken a temporary job which takes up much of her time.) She thought it would just be a quick pick-up and drop-off and hadn't known the details. However, Bobbi noticed that Laura works with training people on new computer systems and asked if she might be interested in volunteering in the future when SCPL introduces its new system or when the new SV branch opens. Laura liked that idea so Bobbi will contact Ron at the Friends and see if a file can be set up to tap people with special talents when those talents are most needed.

Kathleen Frey, Outreach Library Clerk, has just completed a most difficult project. Bobbi had asked her if she could work up a spreadsheet to keep track of all the BookBuddies who have volunteered for the program since its inception. She has sifted through all the old monthly reports and looked through all of Bobbi's paper files to compile the list.

At Branciforte, a crew of eight volunteers assisted staff with such back office tasks as processing periodicals, sorting book donations, and searching for missing material. One volunteer created a beautiful book display on Shakespeare to draw attention to Shakespeare Santa Cruz's performances this summer.

4. WELCOMING PLACE

A. Identify the physical changes and funding required to provide 21st century library facilities.

Bids were opened for the new Scotts Valley Library and, as hoped, the climate is still on the side of the customer. Bids came in as much as 20% below the estimate which means many of the alternates are now part of the base bid.

B. The virtual branch meets the definition of a welcoming place

C. People receive service at the level they need and want

5. FINANCIAL SUSTAINABILITY

A. The Library System maintains a healthy and stable financial position

B. There is adequate, stable and diverse funding to finance ongoing operations, key strategic initiatives and capital projects.

C. Services of a defined level and quality are consistently delivered based on revenue projections and supportive organizational and operating structure.

Applications for the task force on fiscally sustainable service models were due June 30. In the meantime, the task force subcommittee held several meetings to lay the groundwork so the task force can hit the ground running in August.

D. The Library operates efficiently and focuses on continual improvement.

The Grand Jury report was released in June. Responses from Jack Dilles, Finance Director for the City of Santa Cruz, Teresa Landers and the Library Joint Powers Board are due by September.

6. ORGANIZATIONAL READINESS

A. Staff receives adequate training to do their jobs effectively

The Library received a mini-grant from the Pacific Library Partnership to bring the InfoPeople workshop, TechZoo to Santa Cruz. Staff and public will have an opportunity to try out the latest technology.

B. SCPL is committed to developing current library staff to become tomorrow's library leaders.

Lois Meyer and Barbara Pasternak volunteered to interview, train and mentor two Summer Youth Employees for Live Oak Branch. They have taken on responsibility for orientation and training these two young people to help with various duties at Live Oak from cutting paper for requests, to cleaning books to helping pick up in children picture book room after programming.

Teresa graduated from Leadership Santa Cruz County; a year long program to learn about all aspects of Santa Cruz County from business to agriculture to education, etc. Thanks to the City of Santa Cruz for sponsoring her participation.

C. Employees have the skills to execute change and are committed to change and continual improvement.

D. A customer driven service philosophy guides staff training and development.

PER OPEN HOUR

	Bussyness/Open Hour		Circ/Open Hour		Visits/Open Hour		Ref/Info/Open Hour		%change
	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	
July									
Aptos	258	393	107	153	71	98	15	25	69%
Boulder Creek	78	218	30	72	22	86	2	1	-22%
Branciforte	191	389	70	120	68	107	13	59	351%
Capitola	201	341	72	115	56	73	13	25	86%
Central	479	619	204	254	173	196	36	76	110%
Felton	81	283	28	79	25	54	8	5	-30%
Garfield Park	124	232	44	76	42	67	6	11	85%
La Selva Beach	46	113	15	20	22	35	2	2	-29%
Live Oak	184	290	71	108	65	88	10	14	39%
Scotts Valley	251	320	104	123	75	89	23	22	-5%
TOTAL	207	372	82	141	67	106	14	34	145%
August									
Aptos	240	233	97	158	71	88	13	25	96%
Boulder Creek	74	221	27	74	20	87	3	1	-67%
Branciforte	168	358	64	119	55	105	12	59	368%
Capitola	188	314	68	111	48	66	12	24	103%
Central	451	627	190	266	163	200	33	76	129%
Felton	74	218	24	61	21	44	11	5	-57%
Garfield Park	109	206	36	65	39	61	5	11	110%
La Selva Beach	40	87	13	24	18	24	2	2	-15%
Live Oak	164	290	61	112	60	84	11	17	64%
Scotts Valley	218	297	86	115	56	83	19	22	16%
TOTAL	189	360	73	140	61	102	13	35	163%
Sept									
Aptos	239	369	96	149	64	91	12	16	33%
Boulder Creek	166	320	60	106	22	41	3	7	133%
Branciforte	177	304	68	113	69	95	16	15	-6%
Capitola	412	589	169	261	50	69	12	10	-17%
Central	70	240	24	73	158	199	41	59	44%
Felton	108	208	38	70	23	40	10	5	-50%
Garfield Park	42	93	14	25	41	40	6	9	50%
La Selva Beach	168	271	66	105	18	29	2	2	0%
Live Oak	219	301	90	119	62	85	10	21	110%
Scotts Valley	183	344	72	137	67	86	20	14	-30%
TOTAL									
Oct									
Aptos	242	366	100	145	68	87	12	12	1%
Boulder Creek	74	215	26	70	15	51	3	11	267%
Branciforte	173	370	61	129	73	116	19	22	13%
Capitola	181	312	68	116	54	66	13	10	-22%
Central	416	610	167	268	159	243	35	52	48%
Felton	72	217	24	64	22	54	10	13	37%
Garfield Park	108	187	41	60	52	54	6	20	230%
La Selva Beach	41	96	14	26	19	28	3	1	-68%
Live Oak	177	276	75	107	66	84	12	10	-13%
Scotts Valley	222	304	89	123	72	85	6	18	227%
Outreach	na	na	na	na	na	na	na	na	na

PER OPEN HOUR

	Busyness/Open Hour FY0809	%change FY0910	Circ/Open Hour FY0809	%change FY0910	Visits/Open Hour FY0809	%change FY0910	Ref/Info/Open Hour FY0809	%change FY0910
TOTAL	1706	73%	666	66%	599	45%	118	44%
Nov (closed 1 wk)								
Aptos	214	88%	153	9%	55	64%	10	63%
Boulder Creek	68	242%	86	-11%	18	129%	2	505%
Branciforte	151	154%	161	-13%	59	69%	16	79%
Capitola	165	93%	132	-13%	45	44%	11	25%
Central	407	70%	266	15%	154	20%	37	87%
Felton	66	224%	127	-50%	20	136%	8	112%
Garfield Park	100	112%	95	-26%	34	87%	6	327%
La Selva Beach	33	205%	41	-25%	16	64%	2	-39%
Live Oak	160	111%	116	21%	37	148%	11	26%
Scotts Valley	191	72%	120	16%	54	60%	6	314%
TOTAL	1555	107%	1297	-5%	492	62%	109	107%
Dec (closed 1 wk)								
Aptos	231	76.51%	92	83%	59	71%	12	34%
Boulder Creek	72	198.27%	24	187%	18	117%	3	390%
Branciforte	174	94.59%	61	70%	63	62%	19	51%
Capitola	73	347.16%	65	66%	47	25%	13	4%
Central	442	58.56%	191	59%	151	28%	35	97%
Felton	70	238.02%	23	201%	21	157%	10	83%
Garfield Park	108	90.62%	36	78%	38	48%	6	340%
La Selva Beach	37	169.65%	11	140%	15	67%	3	-57%
Live Oak	175	89.86%	68	98%	63	54%	12	16%
Scotts Valley	204	60.53%	83	65%	59	55%	6	337%
TOTAL	1586	101.09%	655	81%	534	53%	118	92%
January								
Aptos	235	54.64%	101	56%	62	43%	13	102%
Boulder Creek	77	149.13%	30	120%	22	59%	2	96%
Branciforte	168	103.95%	64	94%	66	51%	15	1%
Capitola	183	55.24%	70	52%	52	17%	13	63%
Central	462	45.69%	211	44%	172	15%	37	91%
Felton	69	194.54%	23	138%	22	104%	9	-41%
Garfield Park	108	56.00%	41	37%	41	33%	8	35%
La Selva Beach	40	107.20%	15	67%	19	24%	2	52%
Live Oak	170	80.78%	69	82%	62	36%	11	162%
Scotts Valley	202	49.78%	88	51%	62	43%	19	19%
TOTAL	1714	70.34%	712	62%	579	34%	128	61%

PER OPEN HOUR

	Busyness/Open Hour		Circ/Open Hour		Visits/Open Hour		Ref/Info/Open Hour	
	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910
		%change		%change		%change		%change
February								
Aptos	248	352	42%	107	149	40%	60	84
Boulder Creek	130	186	43%	50	62	23%	30	37
Branciforte	173	321	86%	65	105	60%	61	87
Capitola	192	288	50%	74	105	43%	47	64
Central	486	618	27%	222	271	22%	142	188
Felton	87	184	111%	30	48	63%	24	38
Garfield Park	114	163	43%	43	54	24%	37	45
La Selva Beach	41	77	88%	15	22	43%	15	22
Live Oak	175	272	56%	67	104	55%	56	82
Scotts Valley	209	289	39%	91	122	34%	81	81
TOTAL	1855	2751	48%	764	1042	36%	554	728
March								
Aptos	270	399	48%	114	167	46%	66	100
Boulder Creek	134	218	62%	49	77	56%	36	49
Branciforte	182	335	84%	67	107	60%	96	151
Capitola	195	313	60%	71	110	53%	52	64
Central	519	664	28%	219	287	31%	176	204
Felton	96	218	128%	32	57	80%	29	35
Garfield Park	122	214	75%	44	73	66%	40	67
La Selva Beach	46	90	94%	15	23	56%	19	24
Live Oak	184	311	68%	71	119	69%	65	101
Scotts Valley	227	336	48%	93	143	53%	67	97
TOTAL	1976	3099	57%	775	1162	50%	620	835
April								
Aptos	255	356	40%	107	152	41%	69	85
Boulder Creek	138	192	39%	49	65	33%	35	58
Branciforte	171	312	82%	61	101	66%	64	125
Capitola	187	289	54%	69	106	52%	49	69
Central	452	583	29%	201	270	34%	159	194
Felton	89	199	123%	29	58	103%	26	46
Garfield Park	115	163	41%	40	51	27%	47	47
La Selva Beach	45	88	96%	15	25	65%	19	22
Live Oak	178	247	39%	72	109	52%	64	83
Scotts Valley	211	297	41%	89	129	44%	62	81
TOTAL	1841	2727	48%	733	1068	46%	594	809
May								
Aptos	239	346	45%	100	144	44%	63	76
Boulder Creek	118	172	46%	41	56	37%	27	34
Branciforte	162	293	80%	58	95	64%	60	91
Capitola	177	272	54%	66	100	53%	43	63
Central	435	593	37%	190	236	25%	161	179
Felton	84	166	98%	28	50	77%	24	35
Garfield Park	110	156	41%	40	49	22%	37	40
La Selva Beach	42	74	74%	15	22	49%	17	6
Live Oak	166	183	10%	65	108	65%	55	79
Scotts Valley	200	282	41%	83	121	44%	58	71
TOTAL	1733	2536	46%	684	979	43%	546	674

VOLUME AND PERCENT CHANGE

	Circulation		Busyness*		Reference/info		Visitors	
	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910
July								
Aptos	23085	20850	55824	50334	3,136	3139	15,380	12585
Boulder Creek	4962	3462	13810	10470	334	71	3,914	4151
Branciforte	11536	6716	31273	21789	2,128	3276	11,112	6006
Capitola	12601	9169	33714	24244	2,256	1998	9,402	5821
Central	47566	44812	111926	99046	8,358	12081	40,180	31432
Felton	4882	2531	14168	9064	1,364	173	4,391	1728
Garfield Park	5604	3643	15847	11154	788	546	5,352	3229
La Selva Beach	1907	979	5735	3609	288	53	2,723	1109
Live Oak	14138	12835	36871	32510	2,019	1570	12,974	9870
Scotts Valley	20106	17308	48527	40942	4,342	2760	14,449	11409
Outreach	3684	3245	8573	7421	1,452	2747	na	na
TOTAL	150031	125350	376268	310583	26,465	28415	119,877	87340
August								
Aptos	20967	21655	51832	50085	2,701	3139	15,301	11242
Boulder Creek	4686	4161	13509	10587	552	49	3,460	4188
Branciforte	9638	7806	27625	20027	2,045	3276	9,099	5862
Capitola	11437	10607	30805	25134	1,950	1887	8,126	5256
Central	44430	43409	105513	100246	7,634	12081	37,781	32012
Felton	4289	1959	13075	6972	2,004	156	3,664	1396
Garfield Park	4614	3141	13994	9876	693	546	4,992	2916
La Selva Beach	1655	771	4930	2791	243	53	2,258	760
Live Oak	12241	13221	32700	32495	2,103	1936	11,989	9444
Scotts Valley	16571	16444	41922	38603	3,556	2760	10,815	10639
Outreach	3740	3235	8475	6972	889	2747	na	na
TOTAL	134268	126409	344380	303788	24,370	28630	107,485	83715
Sept								
Aptos	20820	20473	51642	47173	2566	2110	13864	11689
Boulder Creek	4942	3547	13230	10019	527	312	3787	1963
Branciforte	9322	5974	27293	17902	2656	845	11290	5306
Capitola	11430	9015	29814	24349	2003	836	8347	5493
Central	41477	41717	95619	94200	9416	9421	36598	31871
Felton	4227	2336	12351	7676	1753	156	3995	1678
Garfield Park	4895	3373	13848	9973	705	420	5272	1943
La Selva Beach	1747	804	5258	2981	250	74	2189	929
Live Oak	13243	12618	33662	30363	2046	2392	12433	9476
Scotts Valley	17226	16630	42057	38550	3824	1837	12949	10947
Outreach	4029	3550	9652	7457	1300	2747	na	na
TOTAL	133358	120036	334426	290643	27046	21150	110724	81295
Oct								

*Defined as check ins/check outs/route ins/route outs

VOLUME AND PERCENT CHANGE

	Circulation		%change	Busyness*		%change	Reference/Info		Visitors		
	FY0809	FY0910		FY0809	FY0910		FY0809	FY0910	FY0809	FY0910	%change
Aptos	21707	19944	-8.1%	52179	46884	-10.1%	2,603	1556	14592	11,177	-30.6%
Boulder Creek	4646	3340	-28.1%	13106	10320	-21.3%	515	516	2677	2,354	-13.7%
Branciforte	10052	7211	-28.3%	28403	20712	-27.1%	3,143	1218	11939	6,508	-83.5%
Capitola	11489	9252	-19.5%	30440	24959	-18.0%	2,166	806	9025	5,271	-71.2%
Central	41516	42814	3.1%	96396	97660	1.3%	8,195	8359	36851	38,928	5.3%
Felton	4233	2043	-51.7%	12729	6936	-45.5%	1,703	425	3913	1,335	-193.2%
Garfield Park	5186	2901	-44.1%	13880	8973	-35.4%	792	979	6693	2,594	-158.0%
La Selva Beach	1724	842	-51.2%	5057	3074	-39.2%	311	26	2367	895	-164.5%
Live Oak	14294	12679	-11.3%	35376	30941	-12.5%	2,302	1122	13126	9,418	-39.4%
Scotts Valley	17241	16998	-1.4%	42595	38930	-8.6%	1,060	2314	13839	10,938	-26.5%
Outreach	3900	3099	-37.5%	8769	7116	-41.9%	3,978	1833	na	357	na
TOTAL	135988	121123	-10.9%	338930	296505	-12.5%	26,768	19154	115022	78,597	-46.3%
Nov (closed 1 wk)	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	FY0809	FY0910	%change
Aptos	19627	16011	-18.4%	46271	38594	-16.6%	2,147	1556	11900	8,660	-27.2%
Boulder Creek	4130	2752	-33.4%	11937	8356	-30.0%	417	516	3248	1522	-53.1%
Branciforte	9029	5375	-40.5%	24687	16058	-35.0%	2,651	1218	9678	4,183	-56.8%
Capitola	10539	6865	-34.9%	27777	19102	-31.2%	1,810	806	7522	3,877	-48.5%
Central	42606	36594	-14.1%	94359	82860	-12.2%	8,632	8359	35728	22,258	-37.7%
Felton	4068	1537	-62.2%	11574	5109	-55.9%	1,488	425	3531	1,137	-67.8%
Garfield Park	4573	2549	-44.3%	12824	7650	-40.3%	815	979	4385	2,305	-47.4%
La Selva Beach	1307	735	-43.8%	4103	2419	-41.0%	221	26	1926	613	-68.2%
Live Oak	12976	11783	-9.2%	31941	28370	-11.2%	2,125	1122	7304	7,596	4.0%
Scotts Valley	15330	13302	-13.2%	36767	31580	-14.1%	1,118	2314	10340	8,285	-19.9%
Outreach	7221	2658	-63.2%	6807	5908	-13.1%	3,379	1833	na	714	na
TOTAL	131406	100161	-23.8%	309041	246006	-20.4%	24,783	19154	95562	61,150	-36.0%
Dec (closed 1 wk)	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	FY0809	FY0910	%change
Aptos	19953	16235	-18.6%	49920	39162	-21.6%	2,603	1556	12693	9,645	-24.0%
Boulder Creek	4286	2514	-41.3%	12652	7719	-39.0%	515	516	3149	1397	-55.6%
Branciforte	9957	4323	-56.6%	28581	14243	-50.2%	3,143	1218	10310	4,274	-58.5%
Capitola	10978	6504	-40.8%	12236	19541	59.7%	2,166	806	7902	3,531	-55.3%
Central	44336	36544	-17.6%	102465	84033	-18.0%	8,195	8359	35118	23,207	-33.9%
Felton	4037	1656	-59.0%	12236	5640	-53.9%	1,703	425	3701	1,299	-64.9%
Garfield Park	4618	2317	-49.8%	13812	7405	-46.4%	792	979	4827	2,006	-58.4%
La Selva Beach	1383	642	-53.6%	4610	2406	-47.8%	311	26	1901	616	-67.6%
Live Oak	13682	11364	-16.9%	35047	27947	-20.3%	2,302	1122	12559	8,112	-35.4%
Scotts Valley	15883	13084	-17.6%	39209	31472	-19.7%	1,060	2314	11314	8,776	-22.4%
Outreach	3111	2436	-21.7%	7336	5091	-30.6%	3,978	1833	na	579	na
TOTAL	132224	97619	-26.2%	318104	244659	-23.1%	26,768	19154	103474	63,442	-38.7%

VOLUME AND PERCENT CHANGE

	Circulation		%change		Busyness*		%change		Reference/Info		Visitors		%change	
	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910	FY0809	FY0910
	Circulation	Circulation	Busyness*	Busyness*	Reference/Info	Reference/Info	Visitors	Visitors	%change	%change	Visitors	Visitors	%change	%change
January														
Aptos	21839	20228	-7.4%	50658	46421	-8.4%	2,839	3401	13377	11,305	19.8%	13377	11,305	-15.5%
Boulder Creek	5236	3141	-40.0%	13530	9193	-32.1%	340	182	3793	1,648	-46.5%	3793	1,648	-56.6%
Branciforte	10437	6898	-33.9%	27609	19227	-30.4%	2,455	849	10791	5,569	-65.4%	10791	5,569	-48.4%
Capitola	11790	8549	-27.5%	30731	22718	-26.1%	2,149	1668	8760	4,873	-22.4%	8760	4,873	-44.4%
Central	48989	48661	-0.7%	107163	107671	0.5%	8,470	11154	39871	31,611	31.7%	39871	31,611	-20.7%
Felton	4119	1784	-56.7%	12132	6497	-46.4%	1,651	178	3931	1,461	-89.2%	3931	1,461	-62.8%
Garfield Park	5223	2681	-48.7%	13781	8062	-41.5%	996	503	5208	2,604	-49.5%	5208	2,604	-50.0%
La Selva Beach	1824	784	-57.0%	4984	2665	-46.5%	265	104	2353	752	-60.8%	2353	752	-68.0%
Live Oak	13809	14045	1.7%	34087	34508	1.2%	2,131	3124	12429	9,482	46.6%	12429	9,482	-23.7%
Scotts Valley	16979	17080	0.6%	38806	38749	-0.1%	3,565	2834	11848	11,258	-20.5%	11848	11,258	-5.0%
Outreach	2470	2419	-2.1%	7148	6054	-15.3%	950	2799	na	800	na	na	800	na
TOTAL	142715	126270	-11.5%	340629	301765	-11.4%	25,811	26796	112361	81,362	3.8%	112361	81,362	-27.6%
February														
Aptos	21839	19120	-12.5%	50658	45071	-11.0%	2,816	3401	12285	10,797	20.8%	12285	10,797	-12.1%
Boulder Creek	5236	2968	-43.3%	13530	8932	-34.0%	307	182	3160	1,794	-40.7%	3160	1,794	-43.2%
Branciforte	10437	5857	-43.9%	27609	17982	-34.9%	2,504	849	9726	4,873	-66.1%	9726	4,873	-49.9%
Capitola	11790	8433	-28.5%	30731	23032	-25.1%	2,050	1668	7535	5,103	-18.6%	7535	5,103	-32.3%
Central	48989	43293	-11.6%	107433	98941	-7.9%	7,797	11154	31458	30,157	43.1%	31458	30,157	-4.1%
Felton	4119	1545	-62.5%	12132	5882	-51.5%	1,391	178	3349	1,230	-87.2%	3349	1,230	-63.3%
Garfield Park	5223	2570	-50.8%	13781	7805	-43.4%	812	503	4486	2,147	-38.1%	4486	2,147	-52.1%
La Selva Beach	1824	669	-62.2%	4984	2478	-50.3%	220	104	1829	690	-52.7%	1829	690	-62.3%
Live Oak	13112	11664	-11.0%	34087	30495	-10.5%	2,040	3124	10857	9,135	53.1%	10857	9,135	-15.9%
Scotts Valley	16979	15676	-7.7%	38806	37026	-4.6%	2,903	2834	15056	10,385	-2.4%	15056	10,385	-31.0%
Outreach	2470	1879	-23.9%	2470	3214	30.1%	942	2799	na	980	na	na	980	na
TOTAL	142018	113694	-19.9%	336221	280858	-16.5%	23,782	26796	99741	77,291	12.7%	99741	77,291	-22.5%
note: Circulation includes self check but busyness does not Busyness is a measure of staff workload.														
March														
Aptos	23309	21408	-8.2%	56015	51024	-7.3%	3,042	3401	13459	12,779	11.8%	13459	12,779	-5.1%
Boulder Creek	5107	3676	-28.0%	13981	10469	-25.1%	350	182	3743	2338	-48.0%	3743	2338	-37.5%
Branciforte	10664	5979	-43.9%	29194	18770	-35.7%	2,479	849	11205	5,358	-65.8%	11205	5,358	-52.2%
Capitola	11437	8760	-23.4%	31253	25078	-19.8%	2,164	1668	8291	5104	-22.9%	8291	5104	-38.4%
Central	48461	45936	-5.2%	114620	106284	-7.3%	7,947	11154	38938	32,631	40.4%	38938	32,631	-16.2%
Felton	4418	1832	-58.5%	13283	6980	-47.5%	1,565	178	3964	1107	-88.6%	3964	1107	-72.1%
Garfield Park	5281	3488	-34.0%	14780	10276	-30.5%	1,070	503	4819	3,224	-53.0%	4819	3,224	-33.1%
La Selva Beach	1816	747	-58.9%	5596	2876	-48.6%	193	104	2241	758	-46.1%	2241	758	-66.2%
Live Oak	13749	13334	-3.0%	35957	34789	-3.2%	1,988	3124	12766	11,274	57.1%	12766	11,274	-11.7%
Scotts Valley	17309	18253	5.5%	42232	43059	2.0%	3,256	2834	12537	12,447	-13.0%	12537	12,447	-0.7%
Outreach	3722	2216	-40.5%	8527	3942	-53.8%	1,133	2799	na	1,126	na	na	1,126	na
TOTAL	145273	125629	-13.5%	364438	313547	-14.0%	25,187	26796	111963	88,146	6.4%	111963	88,146	-21.3%

VOLUME AND PERCENT CHANGE

	Circulation		Busyness*		Reference/Info		Visitors					
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change			
note: Circulation includes self check but busyness does not. Busyness is a measure of staff workload.												
April												
Aptos	21892	19434	-11.2%	52059	45604	-12.4%	2,929	3402	16.1%	14055	10,818	-23.0%
Boulder Creek	5126	3140	-38.7%	14326	9201	-35.8%	400	182	-54.5%	3613	2,799	-22.5%
Branciforte	9749	5681	-41.7%	27402	17491	-36.2%	2,362	849	-64.0%	10175	6,995	-31.3%
Capitola	11118	8474	-23.8%	29946	23112	-22.8%	2,119	1668	-21.3%	7890	5,482	-30.5%
Central	44425	43203	-2.8%	99970	93354	-6.6%	7,693	11,154	45.0%	35154	30,973	-11.9%
Felton	3982	1864	-53.2%	12399	6373	-48.6%	1,473	178	-87.9%	3587	1,467	-59.1%
Garfield Park	4817	2433	-49.5%	13970	7826	-44.0%	1,217	503	-58.7%	5718	2,257	-60.5%
La Selva Beach	1866	814	-56.4%	5402	2802	-48.1%	189	104	-45.0%	2268	707	-68.8%
Live Oak	14052	12263	-12.7%	34684	27666	-20.2%	2,116	3124	47.7%	12468	9,251	-25.8%
Scotts Valley	16634	16526	-0.6%	39155	38032	-2.9%	2,876	2834	-1.5%	11602	10,429	-10.1%
Outreach	2887	2178	-24.6%	4242	3705	-12.7%	916	2232	143.6%	na	1,050	na
TOTAL	136548	116010	-15.0%	333555	275166	-17.5%	24,290	26230	8.0%	106530	82,227	-22.8%

note: Circulation includes self check but busyness does not. Busyness is a measure of staff workload.

	Circulation		Busyness*		Reference/Info		Visitors					
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change			
note: Circulation includes self check but busyness does not. Busyness is a measure of staff workload.												
May												
Aptos	20,347	18,414	-9.5%	48,736	44,312	-9.1%	2,781	3,402	22.3%	12,927	9,775	-24.4%
Boulder Creek	4,219	2,677	-36.5%	12,243	8,246	-32.6%	365	182	-50.1%	2,758	1,618	-41.3%
Branciforte	9,217	5,299	-42.5%	25,988	16,396	-36.9%	2,092	849	-59.4%	9,638	5,119	-46.9%
Capitola	10,486	8,000	-23.7%	28,285	21,739	-23.1%	1,655	1,668	0.8%	6,881	5,006	-27.2%
Central	41,884	37,809	-9.7%	96,038	94,923	-1.2%	7,450	11,154	49.7%	35,624	28,690	-19.5%
Felton	3,893	1,587	-59.2%	11,673	5,311	-54.5%	1,282	178	-86.1%	3,305	1,123	-66.0%
Garfield Park	4,828	2,345	-51.4%	13,356	7,482	-44.0%	1,217	503	-58.7%	4,534	1,942	-57.2%
La Selva Beach	1,764	695	-60.6%	5,121	2,358	-54.0%	196	104	-46.9%	2,089	194	-90.7%
Live Oak	12,731	12,042	-5.4%	32,415	20,538	-36.6%	1,767	3,124	76.8%	10,764	8,817	-18.1%
Scotts Valley	15,513	15,425	-0.6%	37,229	36,039	-3.2%	2,791	2,834	1.5%	10,848	9,031	-16.7%
Outreach	2,437	2,869	17.7%	4,286	6,520	52.1%	1,214	2,232	83.8%	na	1,113	na
TOTAL	127,319	107,162	-15.8%	315,370	263,864	-16.3%	22,810	26,230	15.0%	99,368	72,428	-27.1%

note: Circulation includes self check but busyness does not. Busyness is a measure of staff workload.

Spotlight on Central Circulation

The Central Circulation Department provides library services that are common to each branch library as well as several specific services for the library system as a whole. Our tasks require specialized knowledge and training in the use of our ILS (Integrated Library System). Our use of the ILS provides for the efficient tracking of materials, maintains the integrity of patron and bibliographic information, and creates the necessary confidence with the information we display to our customers.

The tasks that Central Circ has in common with all other branches include:

- Customer Services at public circulation desks
- Registering borrowers, maintaining and updating confidential patron information
- Checking materials out
- Checking materials in (including maintaining 24 hour open book drops)
- Routing out materials for requests and returns
- Routing in materials for requests and re-shelving
- Collecting payments for library fines, lost materials, print jobs, internet use fees
- Preparing daily cash funds and submitting weekly deposits
- Shelving materials
- Assessing damaged item fees and borrower notifications
- Mending items
- Completing searches for items on weekly and monthly missing/claim return item lists and monthly enroute item lists
- Maintaining photocopy and microfilm equipment

Central Circ provides system library services for:

- Updating and maintaining staff intranet circulation policy manuals and forms
- Working with Library IT to implement ILS changes for system circulation policies and communicating changes to all staff
- Maintaining borrower accounts assigned to our collection service agency
- Processing all mailed-in borrower payments
- Processing all returned mail notices and library cards
- Library Loaning parts of the Central cd and video collections to other branches
- Tracking and correcting borrower, request, fine, and item record issues
- Responding to borrower online circulation questions

Before it was “suspended” in February of 2009, the circulation staff also provided the Inter Library Loan services for the system. Our ILL staff is still eager to bring a modified version of this service back when the issues of library service roles and system financial sustainability are more certain.

Staffing Patterns

The following table shows the distribution of staff coverage and open hours at our three branches per week:

Branch and open hours	Desk Hours covered by Circ	Desk Hours covered by *AS / HQ staff	Desk Hours covered by CEN	Non Desk Circ Hours at Site
Central (40)	80 (8 staff)	100 (11 staff)	18 (2 Staff)	113
B40 (14)	60 (5 staff)	0	0	12
GP (12)	41.5 (4 staff)	0	0	12

*AS/HQ is Access Services Dept. and Headquarters staff

Changes in Library Service Models

Nowhere in the library have the changes in the last year affected the day to day tasks more than at circulation. The reduction of staff, the change in open hours, and the added management and staffing responsibilities for branch libraries has been challenging. The JPB decision to change policy on item security has allowed us to move forward to streamline many tasks previously stymied by either trying to integrate an outdated security system with new technology or being faced with prohibitively expensive alternatives.

Saying goodbye to the date due cards and hello to receipt printers was a game changer. This reduced one source of repetitive motions for circ staff as well as allowing for the move ahead with self-check implementation. The second step toward self-check is the rebarcode project in which Central staff have been involved since the beginning of May. Rebarcoding was completed at the end of June and self-check implementation at Central is expected by mid-July.

Change does not come easy. Implementing self-check is a major commitment of staff and volunteer time, as well as requiring us to rethink our service model. Our staff have many legitimate questions about how this will change our customer service role, how it will be received by our borrowers, and all the real or imagined problems ahead. Self-check without a security system certainly poses some yet to be answered questions concerning loss rate and reliability of our holdings information.

On the horizon is a new ILS and the potential for expanded capabilities. While technology may increase our ability to provide existing services more efficiently, it also increases expectations for expanded services and ever increasing and changing demands upon staff time. Our frontline staff will be greatly affected by these changes. Providing and allowing time for staff training for learning new systems and new roles is a major concern as we move forward.

Information about working at circulation we think is important

Circulation tasks do not start and stop when we open the doors each day. Items are returned to book drops and titles are requested continually. There is a necessary minimum staffing involved whether we are open to the public or not. There is no room to maintain backlogs of materials and no efficiency in doing so. Much of our work is behind the scenes facilitating the movement of materials and keeping materials in order. The earthquake was a great example of what happens when things get out order—we work to avoid that each day.

The volume of materials handling is a major concern that was highlighted in the past with the cost of worker's compensation claims. While this problem was addressed with additional training requirements and awareness, it was also addressed by changing staffing patterns. More of the workload was shared among more staff. Staff time at public circ desks now meets a dual role of providing for public demand needs and sharing the materials handling workload.

Checking out materials is just one of many tasks we do. While self-check will create efficiencies in this area, we should not expect a great reduction of the desk hours needed to staff public desks from this alone. An automated materials handling system to check in an rough sort materials would be a major time saver as well as ergonomic boon. Finally, take full advantage and truly improve efficiencies will require a major commitment to remodel and upgrade facilities that will allow for a restructuring of staff positions at single points of service. However, when we create those single points of service, we need to remember the lessons of the past and avoid concentrating material handling demands at single points which will create single points of failure.

A local employee of Borders has arranged a fundraiser for the Library on **Friday July 16 and Saturday July 17.**

Purchases made at either the **Borders store on Pacific Avenue in SC** or the **Borders store at 50 University Avenue in Los Gatos** contribute to the fundraiser when a hardcopy Borders voucher is presented at the time of purchase.

Vouchers must be printed on white paper.

Vouchers will be sent to branches for staff to give out to patrons. We are sending vouchers to the Friends and will send electronic copies to all SC City employees. Please feel free to give them to family and friends that are interested in supporting the Library in this way.

Online purchases at Borders.com can also be included on July 16 and July 17 when using the **Online Promo Code: SCC716PL.** This code is printed on the voucher.

15% of net sales between \$1,501 and \$5,000
20% of net sales between \$5,001 and \$20,000
25% of net sales over \$20,000



Janis O'Driscoll <odriscollj@santacruzpl.org>

PLP Easy-Aid Grant Award Notification

4 messages

Cao, Wendy <caow@plsinfo.org>
To: odriscollj@santacruzpl.org

Wed, Jun 30, 2010 at 11:28 AM

Congratulations! Your Easy-Aid grant application for Traveling Technology Petting Zoo Training opportunity has been funded in the amount of \$750. A letter with the check made payable to Santa Cruz Public Libraries will be mailed to you by mid-July.

We received 59 grant applications and we were able to award 31 grants. There are no remaining funds, so there will not be a second round of grants at this time. Thank you for participating in the Easy-Aid Grant process.

Linda Crowe

PLP Executive Director

Technology Petting Zoo List

1	Dell Mini Netbook w/Linux Ubuntu 9.04
2	HP Mini Netbook w/Windows XP
3	Asus EeePC netbook
4	Aspire One netbook
5	HP Touchsmart laptop
6	Kindle ebook reader
7	Kindle DX large ebook reader
8	Sony Digital Reader Touch
9	Nook – e-reader
10	Ipad
11	iPhone 3G S
12	Optoma PK-101 DLP Mini Projector for iPhone
13	iPod Touch
14	iPod Nano
15	Olympus Digital Voice Recorder
16	Flip Ultra Video camera
17	RCA Small Wonder video camera
18	Sansa Connect mp3 player
19	Zune mp3 player
20	Sony Walkman
21	Sony PSP (Play Station Portable)
22	Nintendo DS Lite
23	Archos 605
	GAMING brought on request
1	Playstation 3
2	Rock Band CD and drum and guitar
4	Beatles Rock Band CD
5	Wii console
6	Wii sports resort w xtra motionplus

\$1000⁰⁰

Format: Meeting Room

SHARE

Learning how to use new gadgets is always a challenge. The challenge is even greater for library staff who are called upon to help customers with their devices! Add to that the fear factor of not being able to figure it out on the spot or possibly breaking it and it's easy to understand why some of us become technophobes.

- *Do you wonder what all the fuss is about when people go on and on about their iPhones or Blackberries?*
- *Are you wondering why the Kindle seems to be catching on when none of the other e-book readers have?*
- *Would you like to be able to easily shoot short videos and post them on YouTube*
- *Are you uncomfortable when library customers ask questions about or seek help with new mobile devices and applications?*

It's hard to make time in a busy library to learn about and experiment with new technology. Nothing helps more than having an opportunity to spend a little one-on-one time with some of the current favorites including the Kindle, iPhone, iPod touch, netbooks, flip video cameras and more.

Workshop Description: In this half day hands-on workshop, participants will learn the basic operation of many of the hottest electronic devices on the market and will explore their relevance to libraries. In addition to handling them and learning how to perform basic functions, participants will also learn how to talk to customers about the devices, how to help them with the basics and steer them to help if the staff member can't provide it.

Preliminary Course Outline

- Overcoming the Fear of Learning a New Device
 - Hands on is the only way
 - Learn to reset
- Basic Functions
 - Menu systems
 - Buttons and icons
 - Forward and Back
- Connectivity
 - Input and Output
 - What cords do I need?
 - Do I need an account?
 - Is it dangerous to the library's computers?
- Supporting the Public
 - Where to find help
 - The main storage sites for images and video
 - Library applications now and future

If your library is interested in gaming we also have a selection of Nintendo and PlayStation games including Wii Fit, Guitar Hero, Rock Band and Dance Dance Revolution. Special travel arrangements need to be made for this equipment, so please specify when requesting a workshop that you are interested in gaming.

Please note: A contracting library may opt, at no additional cost, to add a bonus session for the

public. This is how the bonus session works: At the conclusion of the workshop, there is a break, after which staff returns and the public is invited in to explore the devices in the technology petting zoo. Library staff have the opportunity to immediately apply what they have learned in the workshop, under the supervision of the Infopeople trainer. This is both a great learning opportunity for staff and a wonderful PR opportunity for the library.

Who Should Attend: Anyone from the California library community with an interest in getting comfortable with electronic devices and supporting the public using them.

Prerequisites: None

For further information or to schedule training: contact Gini Ambrosino at gini@infopeople.org

If you would like to subscribe via RSS and be notified whenever new Infopeople training events are available, you can use these links:

**For new on-ground or online workshops: infopeople.org/workshop/rss

**For new podcasts: feeds.feedburner.com/InfopeoplePodcasts

For information about training, or using materials found on this website, please contact the Infopeople Project Assistant by email at assist@infopeople.org or by phone at 650-578-9685.

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SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD
FINANCE COMMITTEE

MINUTES

June 28, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

5:00 PM PUBLIC MEETING

I. ROLL CALL

Present: Citizenmember Gorson, Councilmember Mike Rotkin, Councilmember Storey
(Called to order at 5:06 pm)

Staff: Teresa Landers, Director of Libraries
Jack Dilles, Director of Finance, City of Santa Cruz

II. APPROVAL OF MEETING AGENDA OF June 28, 2010

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the agenda of June 28, 2010

UNAN

III. APPROVAL OF MINUTES

A. MINUTES OF April 26, 2010

Councilmember Rotkin moved, seconded by Citizenmember Gorson

that the Board approve the minutes of April 26, 2010.

**AYE: Rotkin, Gorson
ABSTAIN: Storey**

B. MINUTES OF May 24, 2010

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the minutes of May 24, 2010.

**AYES: Rotkin, Storey
ABSTAIN: Gorson**

IV. ORAL COMMUNICATIONS

There were no oral communications

V STAFF REPORTS

a.. Financial reports through May 31 were reviewed. Expenditures continue to hold their own. Revenues remain consistent with previous months. 92% of the year is completed with no surprises.

- b. The cash balance remains slightly positive and is expected to remain so through the end of the fiscal year.
- c. We are still not counting on e-rate reimbursement to arrive this fiscal year but do have emails acknowledging what is owed to us.
- d. A memo describing the City's proposal to provide a working capital cash loan to the Library was presented. It will go to the full Library JPB for adoption.
- e. A report from the City's actuarial advisor was shared. It discusses various pension reform options. A council study session is planned for July 13 and board members are welcome to attend. A second tier retirement option, if adopted, would be applied to the salary of each employee in the miscellaneous unit so that Library staff is part of the larger City pool. This means if the Library has a lower rate of Tier 2 employees, the Library will benefit from the overall reduction in the City's rate. A question was raised about the smoothing process as related to Calpers. Jack explained that smoothing spreads losses over a longer period of time. Actuarial limits were changed to allow a longer than normal period of smoothing to lessen the impact. Jack also indicated that the City's contribution to Calpers will eventually rise to 18% and that the 2% at 55 plan and the 2% at 60 plan converge at age 63.

V. NEXT MEETING TOPICS

The July meeting has been canceled.

The next meeting is scheduled for Monday August 23, 2010 5:00-7:00 pm. in the Central Library meeting room.

VI. ADJOURN

The regular meeting adjourned at 5:40 p.m.

Respectfully submitted,

Teresa Landers
Library Director

All documents referred to in these minutes are available in the Library Office.

Revstat.rpt 10:36AM
 06/23/2010
 Periods: 11 through 11

Revenue Status Report
 CITY OF SANTA CRUZ
 5/1/2010 through 5/31/2010

Account Number	Description	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Pct Rcvd
951-41000	TAXES					
951-00-00-0000-41211	Sales and use tax	5,612,255.00	318,871.35	4,423,178.74	1,189,076.26	78.81
Total	TAXES	5,612,255.00	318,871.35	4,423,178.74	1,189,076.26	78.81
951-43000	INTERGOVERNMENTAL					
951-36-00-0000-43210	State operating grants and contributions	70,000.00	0.00	74,143.00	-4,143.00	105.92
951-36-00-0000-43311	Maintenance of effort contributions	5,174,769.00	431,230.75	4,309,866.56	864,902.44	83.29
951-36-50-3610-43190	Federal grants - other	6,762.00	0.00	6,978.00	-216.00	103.19
951-36-55-3631-43210	State operating grants and contributions	2,500.00	185.50	1,669.50	836.50	66.78
Total	INTERGOVERNMENTAL	5,254,031.00	431,416.25	4,392,657.06	861,373.94	83.61
951-44000	CHARGES FOR SERVICES					
951-36-00-0000-44613	Internet use fee	7,000.00	346.70	3,679.75	3,320.25	52.57
951-36-00-0000-44639	Room rentals-library JPA	1,890.00	140.00	1,870.00	20.00	98.94
951-36-00-0000-44680	Interlibrary loan reimbursement	0.00	0.00	88.73	-88.73	0.00
951-36-00-0000-44801	Photocopy fee	10,000.00	621.26	7,065.29	2,934.71	70.65
Total	CHARGES FOR SERVICES	18,890.00	1,107.96	12,703.77	6,186.23	67.25
951-45000	FINES AND FORFEITS					
951-36-00-0000-45131	Library fines	300,000.00	19,237.43	193,713.56	106,286.44	64.57
951-36-00-0000-45132	Lost library items	40,000.00	2,365.45	23,091.17	16,908.83	57.73
Total	FINES AND FORFEITS	340,000.00	21,602.88	216,804.73	123,195.27	63.77
951-46000	MISCELLANEOUS REVENUES					
951-00-00-0000-46110	Pooled cash and investment interest	0.00	213.05	-2,876.96	2,876.96	0.00

92%

83%

revstat.rpt 10:36AM
 06/23/2010
 Periods: 11 through 11

Revenue Status Report
 CITY OF SANTA CRUZ
 5/1/2010 through 5/31/2010

92%

951 Library Joint Powers Authority

Account Number	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Pct Rcvd	
951-00-00-0000-46190	Interest earnings - other	3,871.00	148.34	2,836.02	1,035.98	73.24
951-00-00-0000-46910	Miscellaneous operating revenue	0.00	0.00	314.00	-314.00	0.00
951-00-00-0000-46990	Miscellaneous non-operating revenue	60,000.00	214.00	40,816.84	19,183.16	68.03
951-36-00-0000-46303	Donations - library	36,791.00	0.00	44,037.60	-7,246.60	119.79
951-36-00-0000-46309	Donations - Friends of the Lib	72,143.00	0.00	75,271.99	-3,128.99	104.34
951-36-00-0000-46916	Cash over/short	0.00	-7.19	69.98	-69.98	0.00
951-36-00-0000-46918	Damaged property recovery	0.00	0.00	319.11	-319.11	0.00
951-36-00-0000-46923	Insurance reimbursements	0.00	0.00	10,588.22	-10,588.22	0.00
Total	MISCELLANEOUS REVENUES	172,805.00	568.20	171,376.80	1,429.20	99.17
OTHER FINANCING SOURCES						
951-49000	From Library Private Trust Fund	19,456.00	0.00	19,456.00	0.00	100.00
951-00-00-0000-49122	Intra-entity fund transfer in	18,018.00	0.00	18,018.00	0.00	100.00
Total	OTHER FINANCING SOURCES	37,473.00	0.00	37,473.00	0.00	100.00
Grand Total		11,495,454.00	779,566.64	9,254,193.10	2,181,260.90	80.93

**LIBRARY JOINT POWERS AUTHORITY
COMBINED BALANCE SHEET
JPA FUND AND ACCOUNT GROUPS
MAY 2010**

	JPA Total
Assets	
Pooled cash	25,912.58
Pooled cash interest receivable	435.93
Infrastructure	579,683.02
Accumulated depreciation - Infrastructure	(164,848.89)
Buildings	1,758,907.67
Accumulated depreciation - buildings	(765,044.52)
Lease improvements - buildings	259,124.00
Accumulated depreciation - lease imp-buildings	(163,048.94)
Machinery and equipment	1,628,318.81
Accumulated depreciation - machinery & equip	(1,471,843.15)
Software	61,759.70
Accumulated depreciation-software	(61,759.70)
Construction in progress	52,613.65
Total Assets	1,740,210.16
Liabilities	
Accounts payable	41,713.80
Sales tax payable	1,396.75
Deferred grant revenue - unearned	529.84
Unclaimed funds	1,100.45
Payable to the County - noncurrent	120,879.18
Other intergovernmental payable-noncurrent	391,139.91
Total Liabilities	556,759.93
Equities	
Unreserved, undesignated fund balance	(18,392.33)
Investment in capital assets - Library	1,713,861.65
Reserved for long-term debt	(512,019.09)
Total Equities	1,183,450.23
Total Liabilities and Equities	1,740,210.16

- Felton

LIBRARY JOINT POWERS AUTHORITY						
COMBINED BALANCE SHEET						
SPECIAL FUNDS						
MAY 2010						
Fund #	Contingency	Technology	Projects	Felton	Spec Funds	Total
955						
956						
957						
960						
Assets						
Pooled cash	9,383.59	4,741.30	467.11	1,127.32		15,719.32
Pooled cash interest receivable	23.97	12.12	1.21	3.26		40.56
Total Assets	9,407.56	4,753.42	468.32	1,130.58		15,759.88
Equities						
Unreserved, undesignated fund balance	9,407.56	4,753.42	468.32	1,130.58		15,759.88
Total Equities	9,407.56	4,753.42	468.32	1,130.58		15,759.88

LIBRARY JOINT POWERS AUTHORITY						
COMBINED BALANCE SHEET						
TRUST FUNDS						
MAY 2010						
	Fund #	931	932	933	934	Trust Funds
Fund Description	McCaskill Loc His	McCaskill Vis Imp	Finkeldey	Whalen	Total	
Assets						
Pooled cash	263,100.79	254,001.68	9,639.44	143,383.95		670,125.86
Pooled cash interest receivable	676.58	653.28	24.80	367.80		1,722.46
Total Assets	263,777.37	254,654.96	9,664.24	143,751.75		671,848.32
Equities						
Net assets held in trust-library prog	263,777.37	254,654.96	9,664.24	143,751.75		671,848.32
Total Equities	263,777.37	254,654.96	9,664.24	143,751.75		671,848.32

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06/23/2010
Periods: 11 through 11

Expenditure Status Report
CITY OF SANTA CRUZ
5/1/2010 through 5/31/2010

Page: 1

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951 Library Joint Powers Authority

92%

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
951-52000	SERVICES					
951-36-50-3510-52135	Financial services - outside	6,391.00	0.00	6,391.00	0.00	100.00
951-36-50-3510-52149	Interagency labor charges	653,046.00	44,118.98	588,927.02	64,353.15	90.15
951-36-50-3510-52199	Other professional & technical services	21,718.00	0.00	18,740.20	538.07	97.43
951-36-50-3510-52240	Office equipment operation/maint	4,620.00	89.48	3,334.31	1,285.69	72.17
951-36-50-3510-52244	Other equipment operation/maintenance	400.00	0.00	0.00	400.00	0.00
951-36-50-3510-52302	Travel and meetings	2,000.00	160.90	1,340.45	659.55	67.02
951-36-50-3510-52402	Telecommunications service - internal	82,224.00	0.00	61,668.00	20,556.00	75.00
951-36-50-3510-52403	Telecommunications service - outside	21,794.00	-94.39	9,567.82	-2,463.73	111.30
951-36-50-3510-52933	Liability insurance/surety bonds-outside	13,167.00	0.00	11,430.00	1,737.00	86.81
951-36-50-3510-52939	Advertising	3,000.00	0.00	0.00	3,000.00	0.00
951-36-50-3510-52961	Dues and memberships	2,720.00	0.00	1,295.09	1,425.00	47.61
951-36-50-3510-52971	Printing and binding-internal	0.00	0.00	144.02	-144.02	0.00
951-36-50-3510-52972	Printing and binding-outside	7,500.00	0.00	4,442.42	3,057.58	59.23
951-36-50-3510-52973	Moving Costs	8,170.00	0.00	8,168.92	1.08	99.99
951-36-50-3540-52136	Financial services - outside	599,526.00	40,290.81	460,223.04	139,302.96	76.76
951-36-51-3520-52131	Claims management services - outside	16,000.00	572.80	11,805.05	-2.60	100.02
951-36-51-3520-52149	Interagency labor charges	1,150,643.00	91,666.10	1,005,179.08	145,463.92	87.36
951-36-51-3520-52244	Other equipment operation/maintenance	2,500.00	0.00	1,044.00	1,456.00	41.76
951-36-51-3520-52248	Software maintenance services	24,838.00	280.90	10,425.84	14,412.16	41.98
951-36-51-3530-52248	Interagency labor charges	10,000.00	0.00	2,859.75	7,640.25	23.60
951-36-52-3530-52972	Travel and meetings	3,000.00	316,757.29	3,724,866.09	585,474.91	86.42
951-36-52-3530-52972	Printing and binding-outside	2,055.00	73.00	1,788.04	1,211.96	59.60
951-36-53-3515-52149	Interagency labor charges	219,481.00	17,073.93	191,560.61	1,821.24	39.29
951-36-53-3515-52201	Water, sewer and refuse	64,706.00	3,290.76	45,484.29	19,221.71	70.29
951-36-53-3515-52211	Janitorial services	180,928.00	12,992.33	129,545.51	51,382.49	71.60
951-36-53-3515-52223	Vehicle operation charges - internal	38,103.00	3,295.05	32,019.83	6,083.17	84.03
951-36-53-3515-52246	Building and facility o & m - outside	141,611.00	12,307.16	125,664.55	2,490.25	98.24
951-36-53-3515-52247	Landscaping maintenance services	12,975.00	0.00	4,616.45	8,358.55	35.58
951-36-53-3515-52261	Equipment, building and land rentals	401,232.00	32,944.44	362,289.84	29,579.16	92.63
951-36-53-3515-52302	Travel and meetings	250.00	0.00	0.00	250.00	0.00

951 Library Joint Powers Authority

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
951-36-53-3515-52932	15,500.00	0.00	11,625.00	0.00	3,875.00	75.00
951-36-53-3515-52933	33,187.00	0.00	28,693.00	0.00	4,494.00	86.46
951-36-54-3550-52149	544,351.00	41,774.31	476,291.83	0.00	68,059.17	87.50
951-36-54-3550-52199	22,000.00	2,348.25	12,926.54	2,977.46	6,096.00	72.29
951-36-54-3550-52248	66,051.00	0.00	31,730.39	0.00	34,320.61	48.04
951-36-54-3550-52249	54,100.00	1,269.81	34,310.56	2,483.58	17,305.86	68.01
951-36-54-3550-52302	1,430.00	53.00	875.20	0.00	554.80	61.20
951-36-54-3550-52403	58,423.00	1,054.21	82,847.41	5,124.67	-29,549.08	150.58
951-36-55-3560-52149	671,454.00	60,317.15	543,120.20	0.00	128,333.80	80.88
951-36-55-3560-52302	660.00	0.00	233.61	0.00	426.39	35.40
951-36-55-3560-52304	10,910.00	820.25	4,383.26	0.00	6,546.74	39.99
951-36-55-3560-52306	6,762.00	21.90	3,288.90	0.00	3,473.10	48.64
951-36-55-3560-52972	6,000.00	529.19	1,121.08	0.00	4,878.92	18.68
Total SERVICES	9,498,767.00	684,007.61	8,057,590.06	54,712.10	1,386,464.84	85.40
951-53000	SUPPLIES					
951-36-50-3510-53101	17,000.00	515.21	5,527.98	0.00	11,472.02	32.52
951-36-50-3510-53102	16,500.00	1,429.51	12,301.30	0.00	4,198.70	74.55
951-36-51-3520-53106	809,000.00	46,952.22	412,532.51	0.00	396,467.49	50.99
951-36-51-3520-53107	76,939.00	3,946.80	57,868.88	0.00	19,070.12	75.21
951-36-51-3520-53112	141,791.00	9,247.21	78,455.61	1,394.80	61,940.59	56.32
951-36-52-3530-53108	7,248.00	0.00	4,155.95	0.00	3,092.05	57.34
951-36-53-3515-53108	3,690.00	257.85	1,504.98	0.00	2,185.02	40.79
951-36-53-3515-53113	18,000.00	1,660.00	13,849.68	0.00	4,150.32	76.94
951-36-53-3515-53311	152,710.00	10,180.22	127,156.86	0.00	25,553.14	83.27
951-36-53-3515-53312	25,200.00	1,647.18	19,976.32	0.00	5,223.68	79.27
951-36-54-3550-53110	18,000.00	1,726.39	8,794.89	0.00	9,205.11	48.86
Total SUPPLIES	1,286,078.00	77,542.59	742,124.96	1,394.80	542,558.24	57.81
951-54000	OTHER MATERIALS AND SERVICES					
951-36-50-3510-54990	2,200.00	355.34	355.34	0.00	1,844.66	16.15
951-36-52-3530-54990	89.00	0.00	89.00	0.00	0.00	100.00
951-36-54-3550-54203	30,000.00	10,446.30	20,695.50	0.00	9,304.50	68.99
951-36-54-3550-54990	0.00	0.00	68.16	0.00	-68.16	0.00

expstatrpt 10:28AM
 06/23/2010
 Periods: 11 through 11

Expenditure Status Report
 CITY OF SANTA CRUZ
 5/1/2010 through 5/31/2010

951 Library Joint Powers Authority

92%

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prci Used
951-36-55-3531-54990	2,500.00	180.00	1,469.45	366.00	64.55	73.42
951-36-55-3560-54990	7,275.00	166.56	4,274.68	0.00	3,000.32	58.76
Total OTHER MATERIALS AND SERVICES	42,064.00	11,158.22	26,952.13	366.00	14,745.87	64.94
951-56000						
951-36-52-3530-56995	1,200.00	251.50	1,356.50	0.00	-156.50	113.04
Total OTHER CHARGES	1,200.00	251.50	1,356.50	0.00	-156.50	113.04
951-57000						
951-36-51-3520-57401	14,230.00	0.00	14,229.53	0.00	0.47	100.00
951-36-54-3550-57409	6,200.00	0.00	6,183.47	0.00	16.53	99.73
Total CAPITAL OUTLAY	20,430.00	0.00	20,413.00	0.00	17.00	99.92
951-58000						
951-36-50-3540-58140	39,022.00	0.00	39,010.36	0.00	11.64	99.97
951-36-50-3540-58190	40,293.00	0.00	40,293.07	0.00	-0.07	100.00
951-36-50-3540-58240	41,508.00	0.00	21,507.52	0.00	20,000.48	51.82
951-36-50-3540-58290	8,500.00	0.00	3,932.60	0.00	4,567.40	46.27
Total DEBT SERVICE	129,323.00	0.00	104,743.55	0.00	24,579.45	80.99
Grand Total	10,977,862.00	772,959.92	8,953,180.20	56,472.90	1,968,208.90	82.07

* Friends paid - ~~offset~~ offset by revenue

disk cleaner *
 receipt printers
 est

Personnel

101 General Fund
 35 Library (City)

92%

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
101-35-51000 PERSONNEL SERVICES						
Total Regular full time	4,305,302.00	321,026.14	3,941,864.26	0.00	363,447.74	91.56
Total Regular part time	610,327.00	57,312.87	640,701.07	0.09	-30,374.07	104.98
Total Overtime	0.00	267.09	2,309.38	0.00	-2,309.38	0.00
Total Termination pay	0.00	0.00	27,157.79	0.00	-27,157.79	0.00
Total Temporary	510,086.00	30,086.36	322,464.27	0.00	187,621.73	63.22
Total Other pay	0.00	0.00	1,032.15	0.00	-1,032.15	0.00
Total Special vacation pay	0.00	0.00	12,576.42	0.00	-12,576.42	0.00
Total Special sick leave pay	0.00	0.00	695.56	0.00	-695.56	0.00
Total Vehicle allowance	2,880.00	250.00	3,000.00	0.00	-120.00	104.17
Total Retirement contribution	631,119.00	49,501.67	595,260.47	0.00	35,858.53	94.32
Total F.I.C.A.	61,081.00	1,357.16	15,606.70	0.00	45,474.30	25.55
Total Group health insurance	943,722.00	76,171.18	792,838.20	0.00	150,883.80	84.01
Total Group dental insurance	98,798.00	7,848.35	86,443.43	0.00	12,354.57	87.50
Total Vision insurance	17,895.00	1,423.63	15,728.05	0.00	2,166.95	87.89
Total Medicare insurance	58,203.00	5,331.70	88,645.20	0.00	-30,437.20	152.29
Total Group life insurance	2,673.00	228.66	2,504.65	0.00	168.35	93.70
Total Disability insurance	35,613.00	2,714.44	32,927.70	0.00	2,685.30	92.46
Total Unemployment insurance	12,291.00	1,852.41	16,150.82	0.00	-3,859.82	131.40
Total Workers' compensation	219,856.00	18,236.88	219,015.25	0.00	840.75	99.62
Total Accrued vacation - period 13	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	7,509,851.00	573,618.54	6,816,911.37	0.00	692,939.63	90.77

Library - Fund 561
 Month-End Cash Balances

	July	August	September	October	November	December	January	February	March	April	May	June
FY 2010 Pooled cash	(908,343.59)	(797,637.50)	(752,924.79)	(597,787.31)	(556,459.72)	(707,533.76)	290,832.95	(390,346.22)	(62,933.26)	15,984.66	26,912.58	(667,431.15)
FY 2009 Pooled cash	(1,028,955.46)	(397,327.61)	(356,999.20)	252,949.44	(714,416.36)	(711,714.51)	(812,054.05)	(668,015.42)	(595,048.05)	(543,665.74)	222,502.65	65,274.00
FY 2008 Pooled cash	555,177.28	285,993.39	362,222.74	452,678.88	381,688.89	348,644.68	414,873.10	180,026.54	267,117.50	988,379.63	877,239.75	65,274.00
FY 2007 Pooled cash	378,173.37	260,209.81	(47,055.07)	77,967.52	141,276.32	331,082.13	1,134,207.34	1,970,264.04	582,080.73	688,990.25	693,402.17	260,082.00



BARTTEL
ASSOCIATES, LLC

**CalPERS Actuarial Issues
6/30/08 Valuation**

June 2010

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
INTRODUCTION

The City of Santa Cruz retained Bartel Associates to provide actuarial consulting services. The following Executive Summary provides the City analysis of their CalPERS Safety and Miscellaneous pension plans. This analysis is designed to assist the City in evaluating their current funding situation.

It may be helpful to first review the summary of basic definitions starting on page 21.

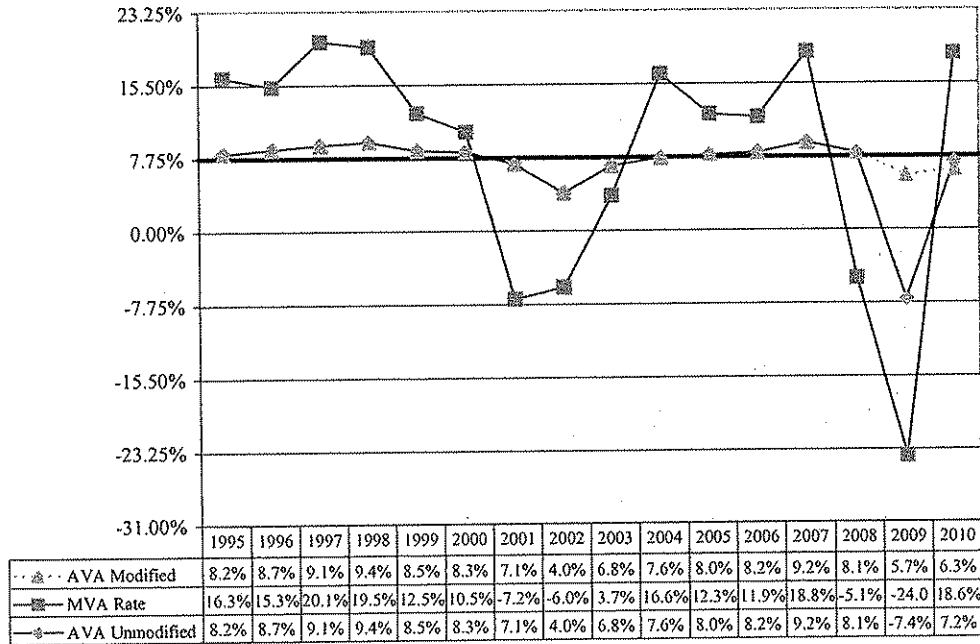
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CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
CALPERS INVESTMENT RETURNS

CalPERS Historical Investment Return

The following chart illustrates CalPERS market and actuarial value investment returns over the past several years:



The 2010 return shown is estimated based on CalPERS February 28, 2010 published rates of 12.0% and additional gain of 4.0% through March 31, 2010 and 7.75% to June 30, 2010. CalPERS' 10 year average annual return is 3.1%.

The chart shows three lines, AVA Modified (Actuarial Value of Assets with CalPERS recent smoothing modification), MVA (Market Value of Assets) Rate and AVA Unmodified (Actuarial Value of Assets based on CalPERS smoothing method prior to recent asset smoothing modification). The MVA Rate is the investment return CalPERS' assets actually earned during the respective fiscal year ends, while the AVA shows the investment return as a smoothed rate reflecting asset gains and losses over a period of time, rather than immediately. The actuarial value of asset investment return directly affects City contribution rates.

The chart indicates a -24.0% June 30, 2009 year end investment return. This compares to an expected return of +7.75%, for a net loss of 31.8%. This loss would have a significant impact on the City's 2011/12 Miscellaneous and Safety contribution rates. However, CalPERS smoothes asset gains and losses using a technique that generally recognizes one fifteenth of market asset gains or losses in a given year. In addition, the smoothing method does not allow the smoothed (actuarial) value to be less than 80% or more than 120% of the

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
CALPERS INVESTMENT RETURNS

market value (the 80-120% corridor). To mitigate the economic impact of the June 30, 2009 market decline, on June 13, 2009, CalPERS' Board approved a modification to the corridor, increasing it to 140% for the June 30, 2009 valuation and to 130% for June 30, 2010 valuation. The corridor will return to 120% for the June 30, 2011 and subsequent valuations. Complicating matters a bit is that each CalPERS valuation determines agency contribution rates two years later (for example, the June 30, 2009 valuation determines fiscal year 2011/12 contribution rates. The anticipated impact of the smoothing modifications are discussed in the Miscellaneous and Safety sections below.



June 7, 2010



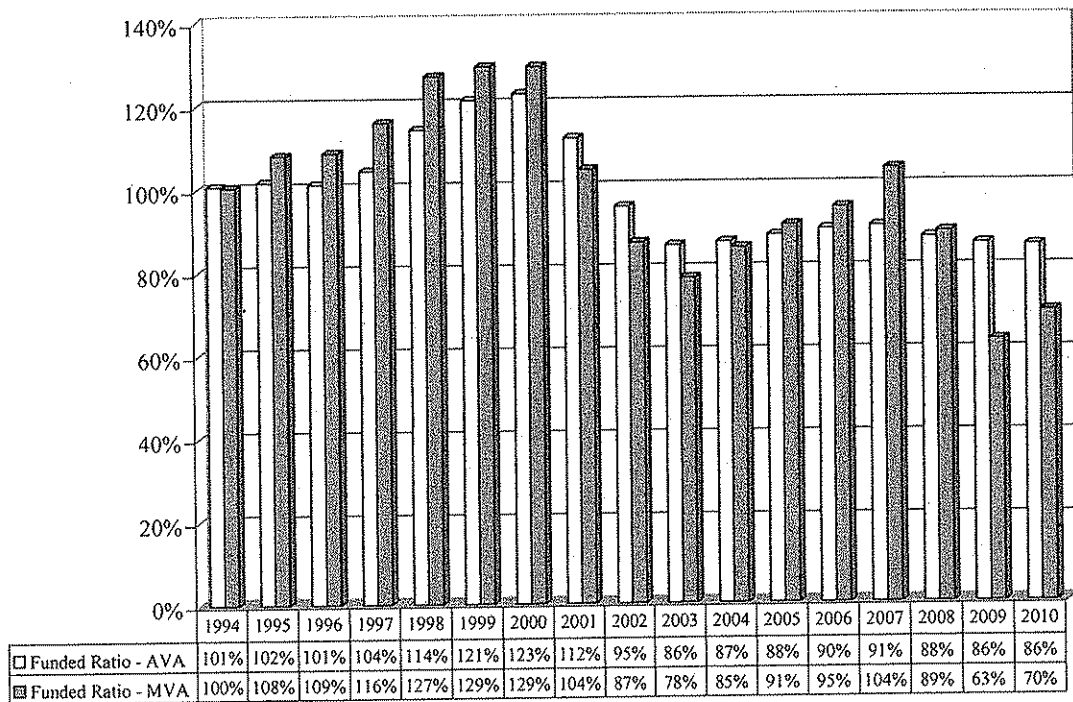
CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
MISCELLANEOUS

Miscellaneous Plan

The City provides CalPERS 2.0%@55 benefit formula for the Miscellaneous employees.

Funded Status

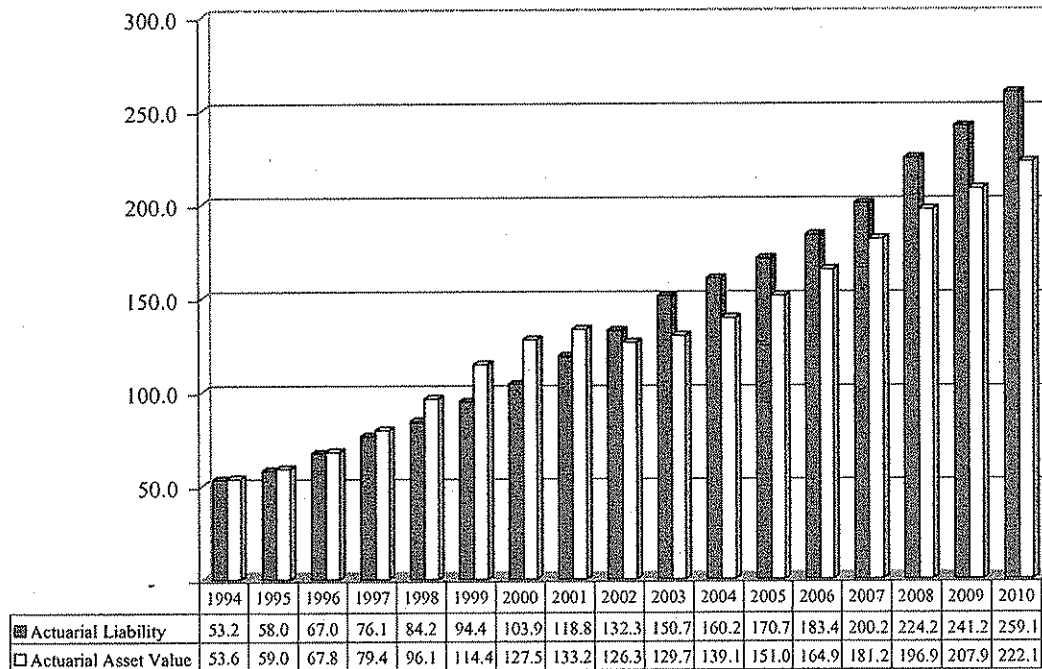
The following two charts show the City’s Miscellaneous Plan’s funded status. The first chart displays the funded status as a percentage of Actuarial Value of Assets and Market Value of Assets; the second chart compares the Actuarial Accrued Liability to the Actuarial Value of Assets (amount in millions). Note that the 6/30/09 and 6/30/10 asset values are estimated.



Having assets equal to Actuarial Liability should be viewed as a target. While this is an appropriate measuring stick, it is expected that assets will move above and sometimes below the actuarial liability. The funding percentage is subject to annual fluctuations based on numerous factors including asset and actuarial (non-asset) gains and losses, and will only become a concern if the plan is consistently under-funded or runs the risk of not being able to pay benefits.



CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
MISCELLANEOUS



The recent investment downturn will have significant impact on the plan's funded status. The following table shows the estimated market value investment losses for the Miscellaneous Plan from June 30, 2008 through June 30, 2010. The Actuarial asset "reserve" is the percent of market assets above actuarial value of assets. The market value of assets experienced a 31.8% loss from what is expected. This loss will be reflected in the June 30, 2009 funded status. Likewise, a projected 10.9% gain in assets for June 30, 2010. Summing these gains and losses together gives an estimated unrecognized loss.

■ Actuarial asset "reserve" at 6/30/08	1.5%
■ June 30, 2009 [-24.0% compared to 7.75%]	-31.8%
■ June 30, 2010 [18.6% compared to 7.75%]	<u>10.9%</u>
■ Total estimated % loss through June 30, 2010	-19.4%
■ Total estimated unrecognized loss [-19.4% x \$200]	\$-38.7 million

The estimated \$38.7 million unrecognized loss will eventually increase the current unfunded actuarial liability (UAL). The following table shows the UAL at June 30, 2007 and

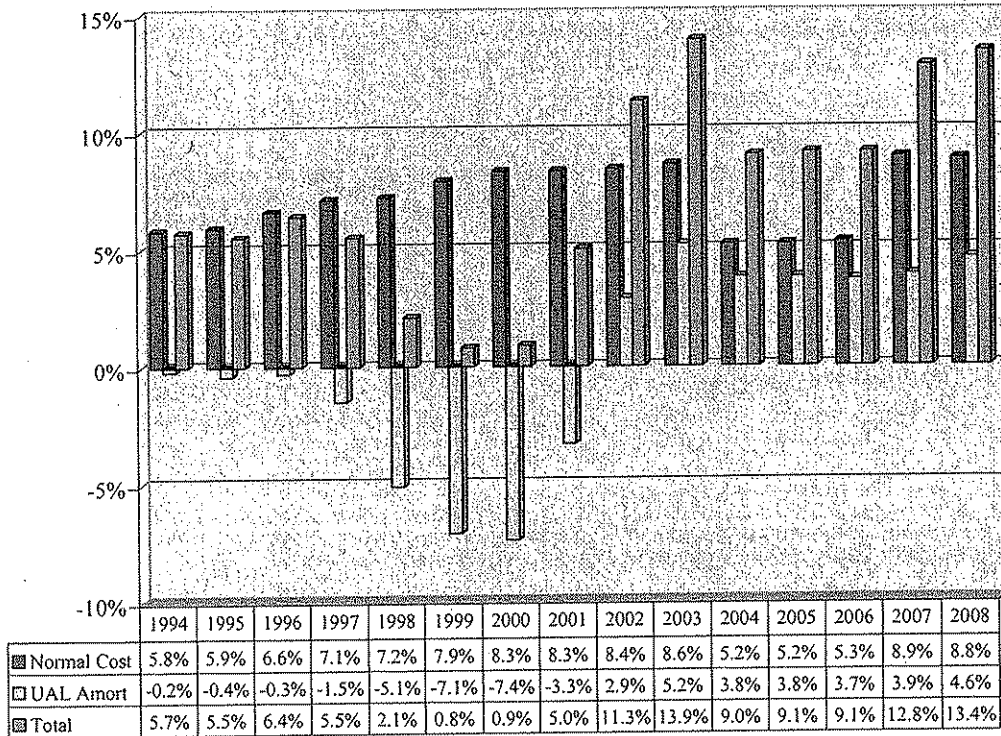
CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
MISCELLANEOUS

June 30, 2008, projected to June 30, 2010 and June 30, 2040 (in millions), using CalPERS gains/losses amortization method.

		Projected			
		6/30/07	6/30/08	6/30/10	6/30/40
■ UAL	\$ 19.0	\$ 27.3	\$ 28.0	\$ 27.3	
■ Investment losses 08/09				60.5	78.7
■ Investment gain 09/10 ¹			(21.8)	(28.3)	
■ Total			66.7	77.7	

Contribution Rates

The following chart shows historical contribution rates for the City's Miscellaneous Plan over the past several years:



¹ Ignores future gains & losses (after June 30, 2010) and asset smoothing, and assumes continuance of 30-year rolling amortization method.

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
MISCELLANEOUS

The years in the above table reflect CalPERS valuation dates, which determine the City's contribution rates two years later. For example 2008 reflects CalPERS June 30, 2008 valuation which determines the City's 2010/11 contribution rates.

In October 2009, CalPERS completed its June 30, 2008 valuation cycle. The following table shows the contribution rates for the 2009/10 and 2010/11 fiscal years.

■ Valuation	<u>6/30/07</u>	<u>6/30/08</u>
■ Contribution Year	<u>2009/2010</u>	<u>2010/2011</u>
■ Normal cost	8.9%	8.8%
■ Amortization bases:		
● Method Change	-0.2%	-0.1%
● (Gain)/Losses	1.5%	2.3%
● Assumption Change	2.2%	2.0%
● Benefit Change	<u>0.4%</u>	<u>0.4%</u>
● Sub-total	<u>3.9%</u>	<u>4.6%</u>
■ Total	12.8%	13.4%

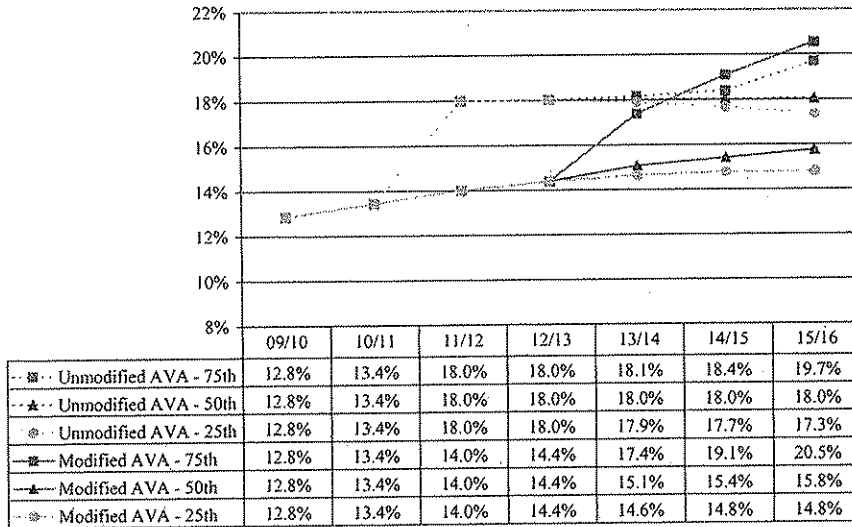


CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
MISCELLANEOUS

Projected Contribution Rates

CalPERS' actual investment return will significantly impact future City contribution rates. The following chart shows the City's projected contribution rates assuming future (6/30/10 and beyond) investment returns will average 0.4% - 4.3%, 7.75% and 11.8% - 15.3% (the 75th, 50th and 25th confidence limits²) respectively. The projections use an estimated 18.6%³ return for June 30, 2010. This assumes no future benefit increases or Tier 2 implementation to the City's retirement plans.

Investment Return Varies



The graph above projects future contribution rates under both CalPERS' modified and unmodified asset smoothing methods. As mentioned in Page 2 of this report, last year CalPERS' Board approved a modification to increase the corridor used in the actuarial value assets to 140% for the June 30, 2009 valuation and to 130% for the June 30, 2010 valuation. As illustrated above, the asset loss of fiscal year 2008/09 is deferred for several years under the modified asset smoothing method. This will give the economy time to recover while allowing the City proper time to plan for the increases contribution rates.

On April 21, 2010, CalPERS' Board of Administration adopted updated actuarial assumption based on a recently completed experience study. The above projections do not reflect the new assumption. The assumption changes will likely increase the above projections by 1%-2% beginning with 2011/12.

² Investment Return will exceed the confidence limit by the given probability
³ Based on CalPERS 2/28/10 published rate of return of 12.0%, an additional gain of 4.0% through 3/31/10 and 7.75% to 6/30/10.

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
POLICE SAFETY

Police Safety Plan

The City participates in CalPERS 3%@50 risk pool for Police Safety employees.

Contribution Rates

In October 2009, CalPERS completed its June 30, 2008 valuation cycle. The following table shows the Police Safety Plan's contribution rates for the 2009/10 and 2010/11 fiscal years. The Police Safety Plan belongs to the 3% @ 50 risk pool.

	<u>6/30/07</u> <u>2009/2010</u>	<u>6/30/08</u> <u>2010/2011</u>
■ Employer Contribution Required		
● Normal Cost		
➤ Pool Rate	15.6%	15.7%
➤ Surcharge for Class 1 Benefits	2.7%	2.7%
➤ Phase out of Normal Cost Difference	<u>-0.2%</u>	<u>0.0%</u>
➤ Subtotal	18.1%	18.4%
● Amortization Bases		
➤ Risk Pool's Payment on Bases	1.7%	2.5%
➤ Amortization of Side Fund	<u>16.6%</u>	<u>14.7%</u>
➤ Subtotal	<u>18.3%</u>	<u>17.2%</u>
● Total Employer Contribution	36.3%	35.6%

Side Funds

A side fund was set up when CalPERS implemented Risk Pools as part of the June 30, 2003 valuation to account for the City UAL plan's at that time. The side funds June 30, 2008 balance was \$12,933,123 and the 2010/11 fiscal year payment will be \$1,399,366. There are 12 years of payments remaining. Below is a table displaying future payments and Side Fund balance.

<u>Contribution Year</u>	<u>Payment</u>	<u>Remaining Balance</u>	<u>Balance Date</u>
2010/11	\$1,399,366	\$12,933,123	6/30/08
2011/12	\$1,444,846	\$12,482,860	6/30/09
2012/13	\$1,491,803	\$11,950,493	6/30/10
2013/14	\$1,540,287	\$11,328,124	6/30/11
2014/15	\$1,590,346	\$10,607,194	6/30/12
2015/16	\$1,642,033	\$9,778,429	6/30/13
2016/17	\$1,695,399	\$8,831,783	6/30/14
2017/18	\$1,750,499	\$7,756,377	6/30/15
2018/19	\$1,807,390	\$6,540,430	6/30/16
2019/20	\$1,866,130	\$5,171,194	6/30/17
2020/21	\$1,926,780	\$3,634,868	6/30/18
2021/22	\$1,989,400	\$1,916,521	6/30/19
2022/23	\$0	\$0	6/30/20

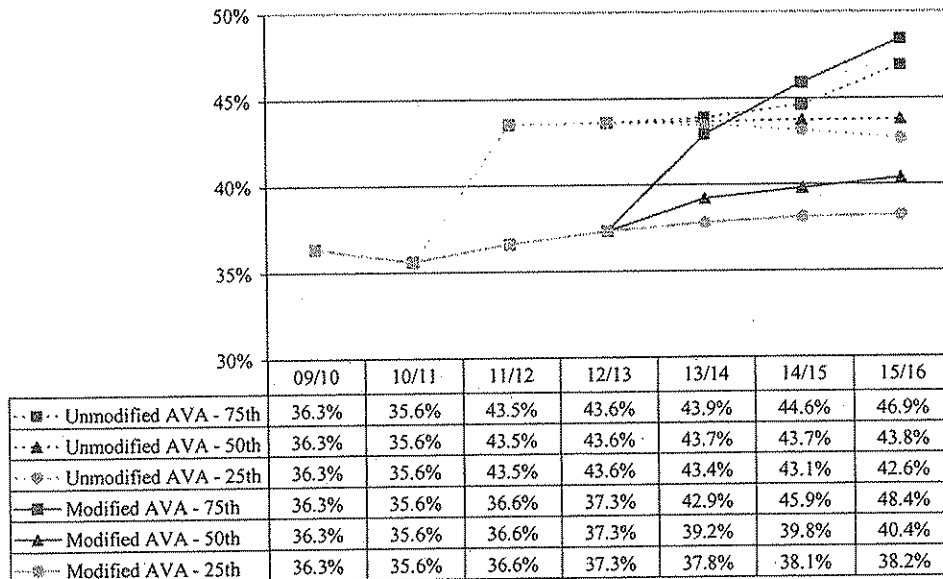


CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
POLICE SAFETY

Projected Contribution Rates

CalPERS' actual investment return will significantly impact future City contribution rates. The following chart shows the City's projected contribution rates assuming future (6/30/10 and beyond) investment returns will average 0.4% - 4.3%, 7.75% and 11.8% - 15.3% (the 75th, 50th and 25th confidence limits⁴) respectively. The projections use an estimated 18.6%⁵ return for June 30, 2010. This assumes no future benefit increases or Tier 2 implementation to the City's retirement plans.

Investment Return Varies



The above graph projects future contribution rates under both CalPERS' modified and unmodified asset smoothing methods. As mentioned in Page 2 of this report, last year CalPERS' Board approved a modification to increase the corridor used in the actuarial value assets to 140% for the June 30, 2009 valuation and to 130% for the June 30, 2010 valuation. As illustrated above, the asset loss of fiscal year 2008/09 is deferred for several years under the modified asset smoothing method. This will give the economy time to recover while allowing the City proper time to plan for the increases contribution rates.

On April 21, 2010, CalPERS' Board of Administration adopted updated actuarial assumption based on a recently completed experience study. The above projection does not reflect the new assumption. The assumption charges will likely increase the above projections by 1-2 percentage points beginning with 2011/12 rates.

⁴ Investment Return will exceed the confidence limit by the given probability

⁵ Estimate based on CalPERS 2/28/10 published rate of return of 12.0%, an additional gain of 4.0% through 3/31/10 based on CalPERS market value from the website and 7.75% thereafter.

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
FIRE SAFETY

Fire Safety Plan

The City participates in CalPERS 3%@50 risk pool for Fire Safety employees.

Contribution Rates

In October 2009, CalPERS completed its June 30, 2008 valuation cycle. The following table shows the Fire Safety Plan's contribution rates for the 2009/10 and 2010/11 fiscal years. The Fire Safety Plan belongs to the 3% @ 50 risk pool.

	<u>6/30/07</u> <u>2009/2010</u>	<u>6/30/08</u> <u>2010/2011</u>
■ Employer Contribution Required		
● Normal Cost		
> Pool Rate	15.6%	15.7%
> Surcharge for Class 1 Benefits	2.7%	2.7%
> Phase out of Normal Cost Difference	<u>-0.1%</u>	<u>0.0%</u>
> Subtotal	18.2%	18.4%
● Amortization Bases		
> Risk Pool's Payment on Bases	1.7%	2.5%
> Amortization of Side Fund	<u>21.2%</u>	<u>18.9%</u>
> Subtotal	<u>22.9%</u>	<u>21.4%</u>
● Total Employer Contribution	41.1%	39.8%

Side Funds

A side fund was set up when CalPERS implemented Risk Pools as part of the June 30, 2003 valuation to account for the City UAL plan's at that time. The side funds June 30, 2008 balance was \$10,418,902 and the 2010/11 fiscal year payment will be \$1,127,327. There are 12 years of payments remaining. Below is a table displaying future payments and Side Fund balance.

<u>Contribution Year</u>	<u>Payment</u>	<u>Remaining Balance</u>	<u>Balance Date</u>
2010/11	\$1,127,327	\$10,418,902	6/30/08
2011/12	\$1,163,965	\$10,056,171	6/30/09
2012/13	\$1,201,794	\$9,627,297	6/30/10
2013/14	\$1,240,853	\$9,125,917	6/30/11
2014/15	\$1,281,180	\$8,545,137	6/30/12
2015/16	\$1,322,819	\$7,877,486	6/30/13
2016/17	\$1,365,810	\$7,114,869	6/30/14
2017/18	\$1,410,199	\$6,248,524	6/30/15
2018/19	\$1,456,031	\$5,268,960	6/30/16
2019/20	\$1,503,352	\$4,165,905	6/30/17
2020/21	\$1,552,210	\$2,928,243	6/30/18
2021/22	\$1,602,657	\$1,543,946	6/30/19
2022/23	\$0	\$0	6/30/20

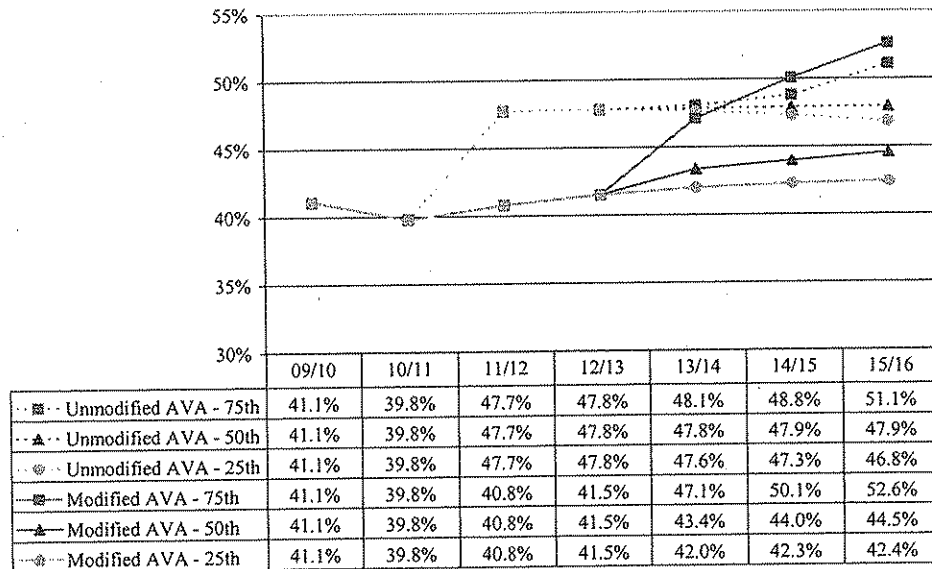


CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
FIRE SAFETY

Projected Contribution Rates

CalPERS' actual investment return will significantly impact future City contribution rates. The following chart shows the City's projected contribution rates assuming future (6/30/10 and beyond) investment returns will average 0.4% - 4.3%, 7.75% and 11.8% - 15.3% (the 75th, 50th and 25th confidence limits⁶) respectively. The projections use an estimated 18.6%⁷ return for June 30, 2010. This assumes no future benefit increases or Tier 2 implementation to the City's retirement plans.

Investment Return Varies



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CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

Implication of a Second Benefit Tier

For purposes of this report we have assumed employees hired on and after July 1, 2010 would be placed into a second tier (Tier 2) providing lower pension benefits. For current employees (Tier 1), benefits would remain the same. Contribution calculations would then be calculated on benefits depending on which tier they belong. However, it is important to note that moving new employees into a different benefit level has no impact on existing unfunded liabilities; it only impacts the level of benefit future employees would earn. This means that the amortization of any unfunded liability component of the contribution rate would remain the same for Tier 2 as it is for Tier 1, but the Normal Cost component of the contribution rate would be lower. As Tier 2 grows, and Tier 1 is closed, the cost for Tier 1 will decrease (as a dollar amount) and the replacement cost of the new Tier 2 participants would be less than if they had been in the current Tier 1 plan. This results in decreasing City contributions as a percent of payroll.

The following two pages show the CalPERS benefit factor comparison for Miscellaneous and Safety Plans.



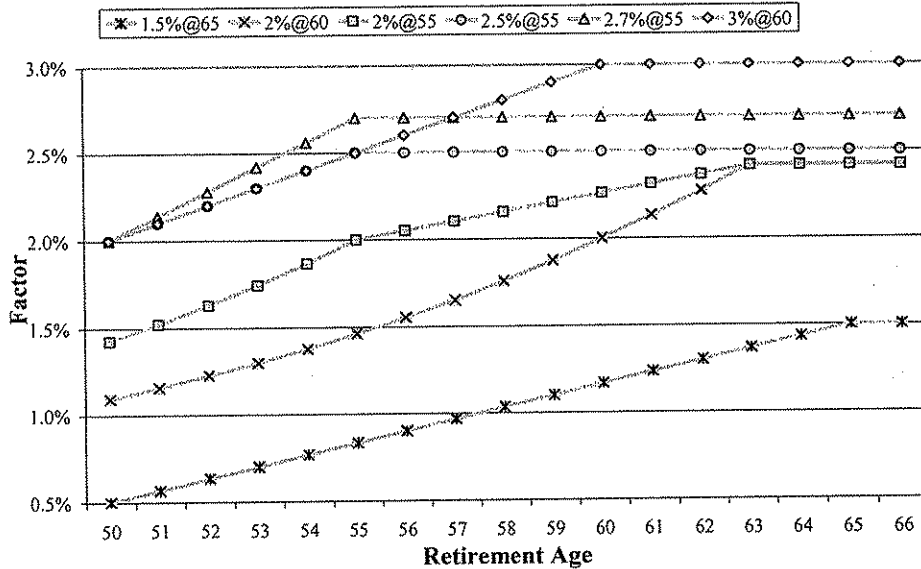
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**CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES**

Miscellaneous

Benefit Factor Comparison



<u>Age</u>	<u>1.5%@65</u>	<u>2%@60</u>	<u>2%@55</u>	<u>2.5%@55</u>	<u>2.7%@55</u>	<u>3%@60</u>
50	0.500%	1.092%	1.426%	2.000%	2.000%	2.000%
51	0.567%	1.156%	1.522%	2.100%	2.140%	2.100%
52	0.633%	1.224%	1.628%	2.200%	2.280%	2.200%
53	0.700%	1.296%	1.742%	2.300%	2.420%	2.300%
54	0.767%	1.376%	1.866%	2.400%	2.560%	2.400%
55	0.833%	1.460%	2.000%	2.500%	2.700%	2.500%
56	0.900%	1.552%	2.052%	2.500%	2.700%	2.600%
57	0.967%	1.650%	2.104%	2.500%	2.700%	2.700%
58	1.033%	1.758%	2.156%	2.500%	2.700%	2.800%
59	1.100%	1.874%	2.210%	2.500%	2.700%	2.900%
60	1.167%	2.000%	2.262%	2.500%	2.700%	3.000%
61	1.233%	2.134%	2.314%	2.500%	2.700%	3.000%
62	1.300%	2.272%	2.366%	2.500%	2.700%	3.000%
63	1.367%	2.418%	2.418%	2.500%	2.700%	3.000%
64	1.433%	2.418%	2.418%	2.500%	2.700%	3.000%
65	1.500%	2.418%	2.418%	2.500%	2.700%	3.000%

Member Contribution Rate

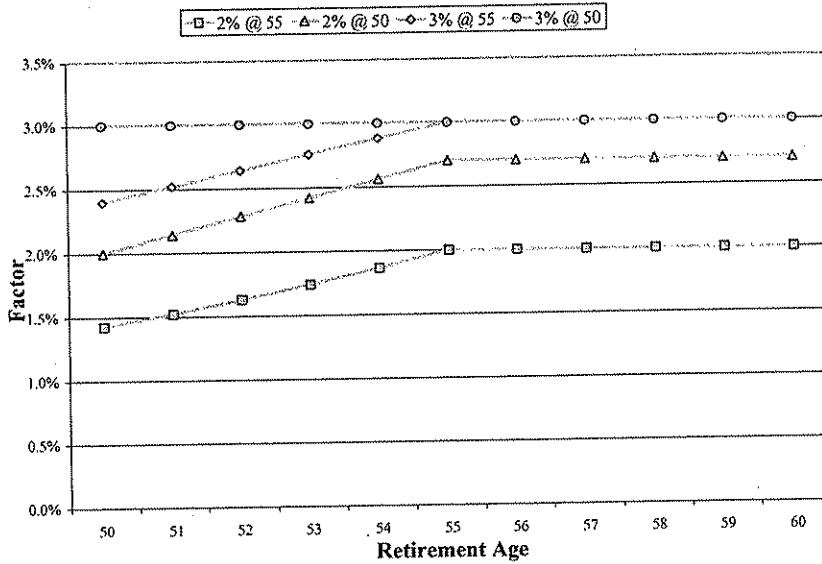
2% 7% 7% 8% 8% 8%



CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

Safety

Benefit Factor Comparison



<u>Age</u>	<u>2% @ 55</u>	<u>2% @ 50</u>	<u>3% @ 55</u>	<u>3% @ 50</u>
50	1.426%	2.000%	2.400%	3.000%
51	1.522%	2.140%	2.520%	3.000%
52	1.628%	2.280%	2.640%	3.000%
53	1.742%	2.420%	2.760%	3.000%
54	1.866%	2.560%	2.880%	3.000%
55	2.000%	2.700%	3.000%	3.000%
56	2.000%	2.700%	3.000%	3.000%
57	2.000%	2.700%	3.000%	3.000%
58	2.000%	2.700%	3.000%	3.000%
59	2.000%	2.700%	3.000%	3.000%
60	2.000%	2.700%	3.000%	3.000%

Member Contribution Rate

8% 9% 9% 9%



June 7, 2010



CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

The City's current benefit formula and 2010/11 contribution rates are:

	Miscellaneous	Police Safety	Fire Safety
● Benefit Formula	2.0% @ 55	3% @ 50	3% @ 50
● FAE	One Year (FAE1)	One Year (FAE1)	One Year (FAE1)
● PRSA	Yes	Yes	Yes
● COLA	2%	2%	2%
● EPMC	None	None	None
● 10/11 ER Contr.			
> Normal Cost	8.8%	15.7%	15.7%
> FAE 1 & PRSA	0.0 ⁸	2.7	2.7
> Pool Amort.	0.0	2.5	2.5
> Amort/Side Fund ⁹	4.6	14.7	18.9
> Subtotal	13.4	35.6	39.8
● EPMC	None	None	None

Miscellaneous Alternative Formulas

Miscellaneous alternative Tier 2 benefit is 2%@60¹⁰. This produces a cost savings for the City.

Miscellaneous Alternative Formulas	2%@60
● Normal Cost	7.0%
● FAE 1 & PRSA	0.5
● Total	7.5
● Savings from current formula	1.3%

⁸ Included in normal cost

⁹ Amortization Payments for Miscellaneous Plan and side fund payment for the pooled Safety Plans

¹⁰ We did not include 1.5%@65 because no agency has contracted this formula.



CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

The following two tables show estimated cost savings (000s omitted) for the Miscellaneous Plan in dollar amounts.

Estimated Savings - Miscellaneous

Year	2% @ 60
2010/11	\$ 33
2011/12	70
2012/13	104
2013/14	139
2014/15	177
2015/16	215
2016/17	257
2017/18	300
2018/19	344
2019/20	392
2020/21	439

The above savings are based on the following Miscellaneous payroll projections shown separately for current (Tier 1) participants and future (Tier 2) participants (000s omitted):

Payroll Projections - Miscellaneous

Year	Tier 1	Tier 2	Total
2010/11	\$ 41,194	\$ 2,542	\$ 43,736
2011/12	39,741	5,416	45,157
2012/13	38,595	8,029	46,625
2013/14	37,386	10,754	48,140
2014/15	35,971	13,734	49,704
2015/16	34,698	16,622	51,320
2016/17	33,084	19,904	52,988
2017/18	31,473	23,237	54,710
2018/19	29,868	26,620	56,488
2019/20	27,966	30,358	58,324
2020/21	26,248	33,971	60,219

Total payroll is expected to grow annually at 3.25% each year. A slower payroll growth results in lower cost savings while a more rapid payroll growth results in greater cost savings.

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

Police Safety Alternative Formulas

Safety alternative Tier 2 benefits could be 3%@55, 2% @50 and 2%@55. Each of these produces a cost savings for the City. The table below shows the Employer rates and net savings for the reduced Tier 2 benefits.

Police Safety Alternative Formulas	3%@55	2%@50	2%@55
• Normal Cost	13.3%	11.5%	11.0%
• FAE 1 & PRSA	2.6	2.1	1.8
• Pool Amortization	<u>2.3</u>	<u>2.0</u>	<u>0.6</u>
• Total	18.2	15.6	13.4
• Savings from current formula	2.7%	5.3%	7.5%

The following two tables below show estimated cost savings (000s omitted) for the Safety Plan in dollar amounts. It is split between the three alternative benefit levels (3%@55, 2%@50, and 2%@55) for Tier 2 participants.

Estimated Savings – Police Safety

Year	3% @ 55	2% @ 50	2% @ 55
2010/11	\$ 10	\$ 20	\$ 28
2011/12	21	41	58
2012/13	34	66	94
2013/14	48	95	135
2014/15	66	131	184
2015/16	83	163	230
2016/17	101	198	280
2017/18	119	235	332
2018/19	141	278	392
2019/20	163	321	453
2020/21	185	364	514



CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

The above savings are based on the following Safety payroll projections shown separately for current (Tier 1) participants and future (Tier 2) participants (000s omitted):

Payroll Projections - Police Safety

Year	Tier 1	Tier 2	Total
2010/11	\$ 9,139	\$ 375	\$ 9,514
2011/12	9,048	775	9,823
2012/13	8,895	1,247	10,142
2013/14	8,681	1,791	10,472
2014/15	8,361	2,451	10,812
2015/16	8,111	3,052	11,163
2016/17	7,810	3,717	11,526
2017/18	7,487	4,414	11,901
2018/19	7,076	5,212	12,288
2019/20	6,664	6,023	12,687
2020/21	6,272	6,827	13,099

Total payroll is expected to grow annually at 3.25% each year. A slower payroll growth results in lower cost savings while a more rapid payroll growth results in greater cost savings.

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

Fire Safety Alternative Formulas

Fire Safety alternative Tier 2 benefits could be 3%@55, 2% @50 and 2%@55. Each of these produces a cost savings for the City. The table below shows the Employer rates and net savings for the reduced Tier 2 benefits.

Fire Safety Alternative Formulas	3%@55	2%@50	2%@55
● Normal Cost	13.3%	11.5%	11.0%
● FAE 1 & PRSA	2.6	2.1	1.8
● Pool Amortization	<u>2.3</u>	<u>2.0</u>	<u>0.6</u>
● Total	18.2	15.6	13.4
● Savings from current formula	2.7%	5.3%	7.5%

The following two tables below show estimated cost savings (000s omitted) for the Fire Safety Plan in dollar amounts. It is split between the three alternative benefit levels (3%@55, 2%@50, and 2%@55) for Tier 2 participants.

Estimated Savings – Fire Safety

Year	3% @ 55	2% @ 50	2% @ 55
2010/11	\$ 6	\$ 13	\$ 18
2011/12	13	26	37
2012/13	21	42	59
2013/14	30	60	85
2014/15	42	82	116
2015/16	52	102	144
2016/17	63	124	175
2017/18	75	147	208
2018/19	88	174	246
2019/20	102	201	284
2020/21	116	228	322

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
TIER 2 ALTERNATIVES

The above savings are based on the following Fire Safety payroll projections shown separately for current (Tier 1) participants and future (Tier 2) participants (000s omitted):

Payroll Projections – Fire Safety

Year	Tier 1	Tier 2	Total
2010/11	\$ 5,732	\$ 235	\$ 5,966
2011/12	5,674	486	6,160
2012/13	5,579	782	6,361
2013/14	5,444	1,123	6,567
2014/15	5,244	1,537	6,781
2015/16	5,087	1,914	7,001
2016/17	4,898	2,331	7,229
2017/18	4,695	2,768	7,464
2018/19	4,438	3,268	7,706
2019/20	4,179	3,777	7,957
2020/21	3,933	4,282	8,215

Total payroll is expected to grow annually at 3.25% each year. A slower payroll growth results in lower cost savings while a more rapid payroll growth results in greater cost savings.



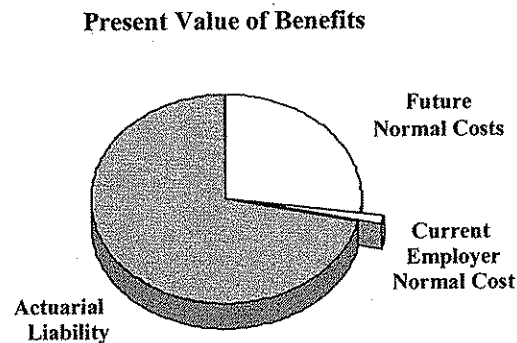
CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
BASIC DEFINITIONS

Understanding these terms makes it easier to understand the City's CalPERS actuarial information.

Present Value of Benefits: When CalPERS (or any actuary) prepares a pension valuation, they first gather participant data (including active employees, former employees not in payment status, participants and beneficiaries in payment status) at the valuation date (for example June 30, 2008). Using this data and some actuarial assumptions, they project future benefit payments. (The assumptions predict, among other things, when people will retire, terminate, die or become disabled, as well as what salary increases, inflation and investment return might be.) Those future benefit payments are discounted, using expected future investment return, back to the valuation date. This discounted present value is the plan's present value of benefits. It represents the amount the plan needs as of the valuation date to pay all future benefits – if all assumptions are met and no future contributions (employee or employer) are made.

Actuarial Liability: This represents the portion of the present value of benefits that participants have earned (on an actuarial, not actual, basis) through the valuation date.

Current Employer Normal Cost: The total normal cost represents the portion of the present value of benefits expected to be earned (on an actuarial, not actual, basis) in the coming year. The current employer normal cost represents the employer's portion of the total normal cost – that is, the total normal cost offset by employee contributions.



The above chart shows the Present Value of Benefits as the sum of Actuarial Liability, Current Normal Cost, and Future Normal Costs. Once these amounts are calculated, the actuary compares actuarial assets to the Actuarial Liability. When assets equal liabilities, a plan is considered on track for funding. When assets are greater than liabilities, the plan has excess assets; when assets are less than liabilities, the plan has an unfunded liability.

Contribution Rate: CalPERS does not require an agency to make up any shortfall (unfunded liability) immediately, nor do they allow an immediate credit for any excess assets. Instead,

CITY OF SANTA CRUZ
CALPERS ACTUARIAL ISSUES – 6/30/08 VALUATION
BASIC DEFINITIONS

the difference is amortized over time. An agency's contribution rate is nothing more complicated than the current employer normal cost, plus the amortized unfunded liability or less the amortized excess assets. Simply put, this contribution is the value of employer benefits earned during the year plus something to move the plan toward being on track for funding. There is a two-year delay from the valuation date to the contribution effective date. For example, the June 30, 2008 valuation generates an agency's 2010/11 fiscal year contribution. CalPERS instituted this delay a few years ago to ensure public agencies would have contribution rates as they begin their budgeting process for each fiscal year.

Fresh Start: When CalPERS prepares a valuation and determines an agency's contribution rate, it's usually in layers, such as gains/losses or plan changes, with each layer (base) adding up to the contribution rate. But if that calculation results in a zero contribution rate, CalPERS combines it into one base and tells the agency it will have a zero contribution for a fixed period. That combination is called a "fresh start." An agency with a fresh start will know it; the actuarial report will show a single base (labeled *fresh start*).

Super-Funded: A plan is super-funded when actuarial assets are greater than the present value of benefits. Referring to the above circle chart a plan has excess assets when assets exceed the Actuarial Liability and a super-surplus when asset exceed the Present Value of Benefit. When a plan is Super-Funded, the super-surplus (actuarial assets over present value of benefits) may be used to pay employee contributions. However, any super-surplus use must occur in the fiscal year for which the valuation report's contribution rate was calculated. For example, a plan super-funded in the June 30, 2008 valuation can use super-surplus to pay 2010/11 fiscal year employee contributions.

Employer Paid Member Contribution (EPMC): Each employee contributes towards his or her retirement based on the retirement formula. If employer chooses to pick up a portion or entire contribution for employees, the portion of member contribution that paid by employer is called Employer Paid Member Contribution.

Final Average Earning (FAE): The final average earning is the monthly average of the member's highest 12 or 36 consecutive months' earning.

Post Retirement Survivor Allowance (PRSA): The portion of retirement allowance will automatically be continued to certain statutory beneficiaries upon the death of the retiree, without a reduction of the retiree's allowance.





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RESOLUTION # 2010-05

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING AND APPROPRIATING FUNDS FROM
THE RICHARDSON TRUST**

WHEREAS, the Santa Cruz Library Joint Powers Board wishes to provide book materials that support library users' need for information, and

WHEREAS, monies from the Richardson Trust are available for this purpose,

NOW THEREFORE, be it resolved by the Library Joint Powers Authority Board

That \$15,000 in income from the Richardson Trust be transferred and appropriated to the FY 2010-2011 Budget for the purchase of library materials that meet the criteria established for the Trust.

PASSED AND ADOPTED this 12th day of July 2010 by the following votes:

AYES: Board Member(s):

NOES: Board Member(s):

ABSENT: Board Member(s):

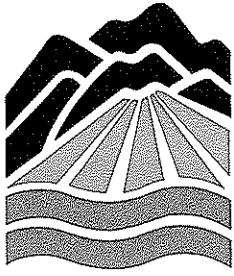
DISQUALIFIED: Board Member(s):

APPROVED

ATTEST

Chair

Board Clerk



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RESOLUTION # 2010-06

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING AND APPROPRIATING FUNDS FROM
THE FINKELDEY TRUST**

WHEREAS, the Santa Cruz Library Joint Powers Board wishes to provide musical materials that support the Library's collection in this subject area, and

WHEREAS, monies from the Finkeldey Trust are available for this purpose,

NOW THEREFORE, be it resolved by the Library Joint Powers Authority Board

That \$190 in anticipated interest income from the Finkeldey Trust be transferred and appropriated to the FY 2010-2011 Budget for the purchase of library music materials.

PASSED AND ADOPTED this 12th day of July 2010 by the following votes:

AYES: Board Member(s):

NOES: Board Member(s):

ABSENT: Board Member(s):

DISQUALIFIED: Board Member(s):

APPROVED

ATTEST

Chair

Board Clerk



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RESOLUTION # 2010-07

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING AND APPROPRIATING FUNDS FROM
THE MCCASKILL TRUST FOR THE VISUALLY IMPAIRED**

WHEREAS, the Santa Cruz Library Joint Powers Board wishes to provide library materials that meet the information needs of people with visual impairments, and

WHEREAS, monies from the McCaskill Trust for the visually impaired are available for this purpose,

NOW THEREFORE, be it resolved by the Library Joint Powers Authority Board

That \$10,000 in accrued McCaskill Trust for the Visually Impaired income be transferred and appropriated to the FY 2010-2011 Budget for the purchase of library materials for this purpose.

PASSED AND ADOPTED this 12th day of July 2010 by the following votes:

AYES: Board Member(s):

NOES: Board Member(s):

ABSENT: Board Member(s):

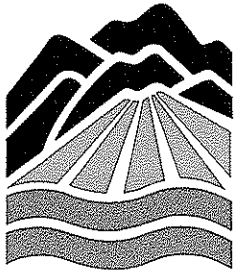
DISQUALIFIED: Board Member(s):

APPROVED

ATTEST

Chair

Board Clerk



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RESOLUTION # 2010-08

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING AND APPROPRIATING FUNDS FROM
THE MCCASKILL TRUST FOR LOCAL HISTORY**

WHEREAS, the Santa Cruz Library Joint Powers Board wishes to provide local history materials that support the Library's collections in this subject area, and

WHEREAS, the Board also wishes to provide sufficient shelving in the Central Branch Californiana Room for the collection, and

WHEREAS, monies from the McCaskill Trust for Local History are available for this purpose,

NOW THEREFORE, be it resolved by the Library Joint Powers Authority Board

That \$5,000 in accrued McCaskill Trust for Local History income be transferred and appropriated to the FY 2010-2011 Budget for the purchase of library materials for this purpose.

PASSED AND ADOPTED this 12th day of July 2010 by the following votes:

AYES: Board Member(s):

NOES: Board Member(s):

ABSENT: Board Member(s):

DISQUALIFIED: Board Member(s):

APPROVED

ATTEST

Chair

Board Clerk



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RESOLUTION # 2010-09

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERING FUNDS AND APPROPRIATING FUNDS
FROM THE FIRST FIVE GRANT**

WHEREAS, The First 5 Commission of Santa Cruz County has awarded the Santa Cruz Library System a grant in the amount of \$2,500 to continue its Family Place Project.

NOW THEREFORE, BE IT RESOLVED that the Library Joint Powers Authority Board

Transfer funds and amend the FY 2010-2011 Budget for \$2,500 to accept the grant for the above named project.

PASSED AND ADOPTED this 12th day of July 2010 by the following votes:

AYES: Board Member(s):

NOES: Board Member(s):

ABSENT: Board Member(s):

DISQUALIFIED: Board Member(s):

APPROVED

ATTEST

Chair

Board Clerk

STAFF REPORT

DATE: June 22, 2010
TO: Joint Powers Board
FROM: Teresa Landers, Library Director
RE: Working Capital Cash Loans

BACKGROUND

Since July 2008, the Santa Cruz County Public Libraries Joint Powers Authority (Library JPA) operating fund has needed to borrow cash on a regular basis in order to meet its financial obligations. The need to borrow cash has primarily resulted from falling revenue in these tough economic times. The City's General Fund has stepped up to loan cash on a temporary basis as needed because this has been the most practical method given that the City routinely pays the bills of the Library JPA by agreement. The City has so far charged the Library JPA interest on these loans at the rate that the City would otherwise earn on its portfolio investments, although there has been discussion with the Library JPA Board and initial action (later reversed) in the past to charge a higher rate of interest.

Loans have typically been made each month until a check (for the prior month) is received by the Library JPA from the Santa Cruz County Library Financing Authority. When the County check is received, the loan is repaid to the City's General Fund. Since July 2008, there has been an outstanding loan on more days than not. During this time, the outstanding loan has exceeded \$700,000 on 94 calendar days, exceeded \$800,000 on 78 days, exceeded \$900,000 on 47 days, and exceeded \$1 million on 35 days. The longest consecutive stretch exceeding \$1 million was for 14 days.

DISCUSSION

It appears, based upon the current financial position of the Library JPA and upon the proposed FY2011 Library JPA operating budget that there will continue to be a need for the Library JPA to borrow funds temporarily in order to meet its financial obligations.

City Finance staff recommends that the City's General Fund continue to loan funds to the Library JPA operating funds subject to the following conditions:

- 1) That total outstanding working capital loans from the City's General Fund to the Library JPA would not exceed \$1 million at any point in time, unless required for payroll expenditures;
- 2) That, if such total outstanding working capital loans would exceed \$1 million at any point as a result of accounts payable checks requested by the Library JPA, those checks would not be issued and released by City staff until the loan balance dropped enough to allow for payment of these checks;

- 3) That if a batch of requested accounts payable checks would cause the City loan to exceed \$1 million, City staff would seek guidance from Library staff as to which checks should and should not be paid, taking into account the amount of credit available;
- 4) That Library payroll costs would be paid even if outstanding working capital loans exceeded \$1 million;
- 5) That the rate of interest to be charged the Library JPA on such loans shall, during FY11, be equal to the City's pooled investments portfolio earnings rate;
- 6) That the rate of interest to be charged the Library JPA on such necessary loans shall, during FY12, be equal to the City's pooled investments portfolio earnings rate plus two percent per annum; and
- 7) That if the City's General Fund does not have cash to loan, no subsequent loans would be made to the Library JPA.
- 8) This action is conditional upon the judgment of the Finance Director and the City Manager.
- 9) This policy shall be reviewed annually.

RECOMMENDATION: Motion to Approve City Finance staff recommendations regarding making temporary working capital loans from the City's General Fund to the Santa Cruz County Public Libraries Joint Powers Authority according to the conditions described.

STAFF REPORT

DATE: June 22, 2010
TO: Library Joint Powers Board
FROM: Teresa Landers, Director of Libraries
RE: Wish List Project

BACKGROUND

The materials budget continued at a reduced level in the 0910 fiscal year. In addition, there was an expectation that the State was going to take money from local government including special districts. The LJPB had agreed to hold out funds from the materials budget to cover in such a situation.

In response, staff approached all the bookstores in the Library's County service area and asked if they were interested in participating in a program whereby the Library would supply a list of materials needed. The bookstores would publicize this list and customers could purchase a copy for the Library and leave it at the bookstore. The Library then came by and picked up the donations. This project started in September 2009.

DISCUSSION

The goal was not only to get needed materials for the Library but to promote business for our local bookstores. The project met with limited success.

- The constant revision of the list of desired materials was extremely time consuming for staff who are already working at capacity due to the increased busyness per open hour experienced by the reduction in open hours.
- The total number of items donation from September to June was 233 (58 adult and 175 Youth plus \$650 in gift card/check donations. 83% of the items were received between September and November. From December to June only 40 items were received. 64% of the gift card/check donations also came between September and December.
- Bookshop Santa Cruz did the best job of promoting the program by putting a slip in the books the library had on its list. However, they were not able to keep this up for the full 9 months due to their own staff shortages and priorities.
- Books received in this way take a lot more time for the technical services staff since they are received with no pre-processing like the majority of items received from our wholesale vendors.

We are extremely grateful to our bookstore colleagues. They were generous with their time in setting this up and in doing what they could to make it work. Thank you to Atlantis, Bookshop Santa Cruz, Bookworks, Borders, Borders Express, Capitola Book Café, Gateways, Kaleidoscope and Literary Guillotine.

We do feel, however, that it is best to not continue the program but to find a way that will be mutually beneficial while respecting the limited time of everyone involved.

RECOMMENDATION: That the Library suspend active continuation of this program and will try a seasonal campaign such as "The Library Holiday Wish List.." Staff will identify a limited area such as mysteries or travel and put together a short list of adult and youth materials on this topic and will work with the bookstores for a limited promotion.

STAFF REPORT

DATE: June 22, 2010
TO: Library Joint Powers Board
FROM: Teresa Landers, Library Director *TL*
RE: Local fund raising

BACKGROUND

In October 2009, the LJPB considered a report regarding amending the financial donations policy to be more specific regarding donations to local community branches. This report also advised the Friends of the Library, a separate 501c3 to adopt a policy regarding donations to local chapters. At that time the LJPB tabled the recommendations and asked for it to be revised and brought back for consideration at a later date.

Since that time, the Library Director has discovered that Library policies are not on a review schedule and is working to establish one.

DISCUSSION

The last time the Gift Policy: Financial Donations was reviewed was 1997. Therefore, since it already deals with the issue of how the Library will treat donations, it is recommended that it be the first to undergo regular review.

Upon careful review of the existing policy, the conclusion is that the recommendations in the October report are unnecessary. The issues raised can be dealt with under the provisions of the existing policy and creating something more restrictive would not be to the ultimate benefit of the system as a whole. A few revisions to the existing policy are recommended for clarification. The policy in its entirety is attached.

<p>RECOMMENDATION: Motion to accept Gifts Policy: Financial Donations as revised.</p>
--

GIFT POLICY: FINANCIAL DONATIONS

The City County Library System welcomes financial donations in any amount to support its services and programs. Options for making donations include cash gifts, bequests, and testamentary trusts for specific or general purposes. Gifts may be made to the Friends of the Santa Cruz Public Libraries, Inc., which is a nonprofit corporation with Internal Revenue Service 501(c)3 (tax deductible) status, or directly to the Santa Cruz Library Joint Powers Authority. The Library System prefers that gifts be made to the Friends of the Santa Cruz Public Libraries, Inc.

All financial gifts to the Library System (whether direct or via the Friends) are treated as additional revenue, over and above the regular operating budget, and are expended according to the wishes of the donor if these are specified. Gifts may be made to honor or memorialize individuals or organizations. However, the Library Joint Powers Board must approve unusual conditions imposed by donors.

The Director of Libraries presents an annual report to the Library Joint Powers Board in September of each year listing the sources and expenditure of gift funds during the previous fiscal year. This report is a public document, which is available at the Library Headquarters Office on request.

1. TYPES OF FINANCIAL GIFTS

Cash Gifts

The most common purpose of a cash gift is for the purchase of a book or other item. Frequently, the purchase is meant to memorialize a deceased friend or relation. The donor often specifies the subject category (and sometimes the specific title) for materials and the Branch where the item should be located. The Library System's professional staff is glad to assist in the selection of a suitable title if none is specified. Each gift item bears a bookplate stating the name of the donor. No matter where the item is permanently located all books and other materials circulate throughout the Library System.

Donors or groups of donors wishing to raise funds *to benefit the Library in any way including* the establishment of specific book or other collections to honor a person, organization, event, or subject area should consult in advance with the Director of Libraries. *Such Collection related* proposals will be evaluated in terms of overall System collection needs, space available, and technical services processing required. *Non collection related proposals will be evaluated in*

terms of local branch and overall System needs and library resources available to support the proposal. The Director of Libraries will inform the Library Joint Powers Board of such proposals. The Board will be responsible for resolving any differences that may arise between the staff and the donor group. Procedures for establishing such special collections are outlined in Section 2 of this policy.

Bequests and Testamentary Trusts

Donors wishing to specify the Library System or the Friends of the Library as the beneficiary or residual legatee of all or portions of their estates should use the following language:

Specific Money Gifts in Will:

"I give the sum of _____ dollars (\$____) [or: I give a sum equal in value to _____(%) of the residue of my estate] [or: I give the residue of my estate] to the Santa Cruz Library Joint Powers Authority [or The Friends of the Santa Cruz Public Libraries, Inc.] to be used solely for library purposes, free of any estate or other taxes."

Gift of Property (Real or Personal):

"I give [describe real or personal property] to the Santa Cruz Library Joint Powers Authority solely for library purposes, free of all debts, liens or encumbrances, and free of estate or other taxes. In the event the described property is not a part of my estate at my death, the gift shall consist of cash or of other property of equivalent value to the property on the date of this Will."

Similar language may be utilized for trusts, usually by way of remainder distributions after the death of the last surviving trustor.

Donors may specify special conditions for use of such bequests, such as book or other library materials purchases, services to children, etc. In the case of gifts to the Friends of the Library, the donor may specify the Friends Endowed Fund for Library Materials, which is maintained by the Community Foundation of Santa Cruz County.

However, donors wishing to attach special conditions to such bequests are encouraged to consult with the Library System. The Library Joint Powers Authority Board reserves the right to determine whether to accept of bequests and trusts with extraordinary conditions.

Donors anticipating a major bequest to the Library System may also wish to consult with the Library System's legal counsel in formulating terms.

In the absence of restriction, the Library Joint Powers Board reserves the right to determine whether bequests shall be invested and only the income used, or the principal expended. The Library Joint Powers Board also reserves the right to determine whether to terminate conditions specified in a bequest or trust should the circumstances of the Library System change.

Bequests or the income from testamentary trusts restricted to the purchase of library materials are expended on an annual basis, and are summarized in the above-cited report by the Director of Libraries. Expenditure plans for gifts for other purposes are considered by the Library Joint Powers Authority Board on recommendation from the Director of Libraries.

2. PROCEDURES FOR ESTABLISHING SPECIAL COLLECTIONS


When the Director of Libraries has accepted a proposal by an individual or group to establish a special collection, responsibilities for implementation will be as follows:

The Library Staff will establish a Gift Account with the Friends of the Library to receive all monies donated for the collection, either directly or via the donor group, and shall make periodic reports on receipts and expenditures to the donor group's representative. The Library will also appoint a Staff Liaison to work with the donor group in selecting materials which are consonant with the group's intent and the Library's selection criteria and collection needs. The Library will purchase and process all materials, ensuring that each item purchased with donated funds bears an appropriate book plate.

The Donor Group will be responsible for all fund solicitation, for special publicity, and for coordinating gift acknowledgement with the Library Staff. The group shall consult with the Staff Liaison on the specific items to be purchased or accepted for the collections.

Confirmed by the Library Joint Powers Authority Board in July 1997
Revised July 2010

STAFF REPORT

DATE: July 6, 2010
TO: Library Joint Powers Board
FROM: Teresa Landers, Library Director 
RE: Two week holiday closure

BACKGROUND

As part of the agreement to accept a 10% furlough, in 2009 city staff received 36 hours of special holiday pay. In addition, both Christmas Eve and New Year's Eve became full day holidays rather than half days. The City then shut down for two weeks during the Christmas holiday season and staff was able to be off work without having to use up any paid leave time. The Library also closed for two weeks; one week at Thanksgiving and one week at Christmas; feeling it was important to be open the week after Christmas.

While the contract has not yet been ratified, we anticipate a similar arrangement for the City for 2010. Last year there was a great deal of concern expressed by the LJPB about closing for two weeks and wanted to have a discussion before approving it again.

DISCUSSION

Holidays are a busy time for the Library. Students have reports to write. Families have time available and many like to spend it at the library getting materials to read, listen to and view. We received many complaints about no library facilities being open during this time. This is particularly true for the week after Christmas.

As you review the options on the following pages you will see a progression of open days. The more days we are open, the more unfunded liability we are incurring. It is impossible to accurately know the amount as it is so dependent on individual choice. This past year there was probably about 25 staff who had some degree of banked holiday time for which they were either paid or converted to vacation time. I hope to have data from last year from which we can try to estimate the liability by the meeting on the 12th.

OPTION 1

Observe City closure fully and be closed Monday –Friday November 22-26; closed Wednesday for furlough and Thursday and Friday for Thanksgiving City Holidays. Then closed again Monday-Saturday December 20-25; closed Wednesday for furlough and closed Thursday –Saturday as holidays and observed holidays. As last year, a minimum number of staff volunteers would be needed to work to cover check-in at the various locations. Library would be open through Sunday December 19 and then again Sunday December 26-Tuesday December 28; closing again Wednesday through Saturday for furlough, holiday and observed holiday.

THANKSGIVING WEEK

SUN	MON	TUE	WED	THUR	FRI	SAT
Nov 21	Nov 22	Nov 23	Nov 24	Nov 25	Nov 26	Nov 27
OPEN	CLOSED	CLOSED	CLOSED FURLOUGH	CLOSED HOLIDAY THANKS- GIVING	CLOSED HOLIDAY DAY AFTER THANKSGIVING	OPEN

WEEK BEFORE CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 19	Dec 20	Dec 21	Dec 22	Dec 23	Dec 24	Dec 25
OPEN	CLOSED	CLOSED	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED CHRISTMAS DAY

WEEK AFTER CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 26	Dec 27	Dec 28	Dec 29	Dec 30	Dec 31	Jan 2
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED NEW YEARS DAY

Note: could do this option and also be open on Wednesday the two weeks around Christmas and use Thursday as a furlough day with Friday and Saturdays as holidays.

OPTION 2

Observe City closure in part. Follow the schedule in Option 1 above except that we keep Scotts Valley, Central and Aptos open regular hours on Monday and Tuesday November 22 and 23 and Monday and Tuesday December 20 and 21 and the Wednesdays are both furlough days.

THANKSGIVING WEEK

SUN	MON	TUE	WED	THUR	FRI	SAT
Nov 21	Nov 22	Nov 23	Nov 24	Nov 25	Nov 26	Nov 27
OPEN	CLOSED SV, APTOS, CEN OPEN	CLOSED SV, APTOS, CEN OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY THANKS- GIVING	CLOSED HOLIDAY DAY AFTER THANKSGIVING	OPEN

WEEK BEFORE CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 19	Dec 20	Dec 21	Dec 22	Dec 23	Dec 24	Dec 25
OPEN	CLOSED SV, APTOS, CEN OPEN	CLOSED SV, APTOS, CEN OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED CHRISTMAS DAY

WEEK AFTER CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 26	Dec 27	Dec 28	Dec 29	Dec 30	Dec 31	Jan 2
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED NEW YEARS DAY

Note: could do this option and also be open on Wednesday the two weeks around Christmas and use Thursday as a furlough day with Friday and Saturdays as holidays.

OPTION 3

Do not observe the City closure and keep library facilities open normal hours except for the days designated as furlough, holiday or holiday observed. Staff would be able to bank the 36 hours of special holiday pay and would have it available to them for use by December 31, 2011. This does create somewhat of an unfunded liability in that staff will have one year to take the special holiday time and can get paid for unused banked holiday time or convert it to vacation. Having more time available to take during the rest of the year may result in a greater use of sub hours. We anticipate there will still be a lot of staff who request time off during this period and will use their special holiday pay immediately. (To summarize: This would mean being closed Wednesday-Friday for Thanksgiving and Wednesday through Saturday during the two weeks of Christmas.)

THANKSGIVING WEEK

SUN	MON	TUE	WED	THUR	FRI	SAT
Nov 21	Nov 22	Nov 23	Nov 24	Nov 25	Nov 26	Nov 27
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY THANKS- GIVING	CLOSED HOLIDAY DAY AFTER THANKSGIVING	OPEN

WEEK BEFORE CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 19	Dec 20	Dec 21	Dec 22	Dec 23	Dec 24	Dec 25
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED CHRISTMAS DAY

WEEK AFTER CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 26	Dec 27	Dec 28	Dec 29	Dec 30	Dec 31	Jan 2
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY OBSERVED	CLOSED HOLIDAY OBSERVED	CLOSED NEW YEARS DAY

OPTION 4

Do not observe the City closure and keep library facilities open normal hours except for the days designated as furlough or holiday as indicated in the chart above. This option does incur an even greater liability in terms of hours banked for use at a later time or converted to cash or vacation than option three since we would be open one more day. (To summarize: This would mean being closed Wednesday-Friday for Thanksgiving and Thursday through Saturday during the two weeks of Christmas. It means one more open day each week than option three.)

THANKSGIVING WEEK

SUN	MON	TUE	WED	THUR	FRI	SAT
Nov 21	Nov 22	Nov 23	Nov 24	Nov 25	Nov 26	Nov 27
OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY THANKS- GIVING	CLOSED HOLIDAY DAY AFTER THANKSGIVING	OPEN

WEEK BEFORE CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 19	Dec 20	Dec 21	Dec 22	Dec 23	Dec 24	Dec 25
OPEN	OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY	CLOSED HOLIDAY

WEEK AFTER CHRISTMAS

SUN	MON	TUE	WED	THUR	FRI	SAT
Dec 26	Dec 27	Dec 28	Dec 29	Dec 30	Dec 31	Jan 2
OPEN	OPEN	OPEN	OPEN	CLOSED FURLOUGH	CLOSED HOLIDAY	CLOSED HOLIDAY

RECOMMENDATION: Motion to accept Option number 4: The Library will not observe the City wide 2 week closure in December 2010 and will only close for the holidays themselves and one furlough day each week.

By date

LJPB Policy Renewal Schedule (every 3 years)

Gift Policy: Financial Donations	Jul-97	Jul-10
Guidelines for Board Members	Sep-05	Sep-10
Communication Policy for Board Members		Sep-10
LJPB Communications Policy	Jun-05	Sep-10
Library Materials & Services Policy		Oct-10
Comments, Questions, and Complaints from the Public About Library Materials	Jul-97	Oct-10
The Library Bill of Rights	Jul-97	Oct-10
The Freedom to View	Jul-97	Oct-10
Free Speech Rights of Citizens	?	Oct-10
Santa Cruz City County Library System		
Policy Regarding Access by Minors to the Internet	Jan-00	Nov-10
Confidentiality of Library (Patron) Records	Feb-06	Nov-10
Library Services to Children: Access to Materials Confidentiality of Records Borrower Cards Parent Responsibility	Jul-97	Nov-10
Library Services to Children	Jul-97	Nov-10
Alcoholic Beverages Policy	Jul-97	Dec-10
Staff In-Service Training Activities for Professional Growth		
Benefactor Recognition Policy	May-97	Jan-11
Confidentiality of Library Records	Jan-02	Jan-11
Meeting Room Policy	Jul-97	Feb-11
Fees Charged for Lost of Damaged Items (Review & Update as Appropriate)	Jul-97	Mar-11
Meeting Room Policy	Sep-03	Apr-11
	Jul-08	Jul-11
Display Policy: Bulletin Boards, Display Cases and Wall-Mounted Exhibits		
Gift Policy: Works of Art for Public Display	Sep-01	Jul-11
Gift Agreement for Works of Art	Jul-97	Sep-11
	?	Sep-11
Volunteer Recognition	Dec-08	Dec-11
Volunteer Policy	Jan-10	Dec-11
Conflict of Interest Code (Bi-annually)	Mar-10	Mar-12

Library Director Grand Jury Response DRAFT

June 28, 2010

The Honorable Judge Paul Burdick
Santa Cruz Superior Court
701 Ocean Street
Santa Cruz, CA 95060

Dear Judge Burdick,

The following is my response to the Grand Jury Report, "Saving the Branches May Kill the Tree: The Fate of the Santa Cruz City/County Public Libraries." This response is divided into three parts: correction of factual errors, response to findings and response to recommendations. I will include the report citation in italics and my responses in regular type.

Correction of Factual Errors

Factual errors within the findings and recommendations will be discussed in those sections respectively.

8. On page 1: "*Faced with projected deficits for the next several years and a negative cash fund balance of over \$4 million at the end of the 2013/14 fiscal year, the JPB is making the same decisions today that it made last year:*
- *additional cuts in hours*
 - *cuts in the books and materials budget*
 - *reduced funds for maintenance and landscaping*
 - *no reserve funds*
 - *further delays in the purchase of technology that's critical to library operations*

There were no additional cuts in hours for FY10/11. The five year budget projection which shows a \$4 million deficit includes rectifying three of the items listed above. The 5 year projection is predicated on a restored materials budget, about \$300,000 each year added to the reserve, and the purchase of a great deal of technology including the establishment of a technology replacement fund.

2. On page 2: "*Integrated Library System (ILS): Also known as a library management system (LMS), a resource planning system for a library, used to track items owned, orders made, bills paid, and patrons who have borrowed.*"

I have never heard an ILS referred to as an LMS nor as a "resource planning system." It is the computer engine that governs all library operations: the purchase of materials, cataloging and processing of materials, the public catalog which allows patrons to search for materials, the circulation of materials in and out and the management of patron accounts. It is not used specifically to pay bills unless patron accounts is what is being referred to. Bills are paid through the City's financial system, Eden.

3. On page 3: *“Right now the Central Library is open 40 hours a week including Saturday, but some branches are open only eight hours during the week and are closed on both Saturday and Sunday”*

To clarify: Central is open Saturday and Sunday. Live Oak is open on Sunday. Aptos, Scotts Valley, Capitola, Branciforte and Boulder Creek are open on Saturday. Only Garfield Park, La Selva Beach and Felton are not open any weekend day and La Selva Beach was offered Saturdays and declined. Only two are open 8 hours per week: Felton and La Selva Beach. La Selva is started a pilot project using volunteers and is open 14 hours per week as of June 22, 2010.

4. On page 3: *“The furloughs begun in 2009 will continue through this fiscal year and now on into the next. Library hours continue to be cut.”*

No hours will be cut in 2010/2011.

5. On page 13: *“The mission of the Santa Cruz Public Libraries is to provide materials and services which help community residents meet their personal, educational, cultural, and professional information needs. This is the current mission statement for the SCPL”*

The correct current mission statement is:

“The Santa Cruz Public Libraries enhance Santa Cruz County’s quality of life by providing vibrant physical and virtual public spaces where people connect, discover, and engage the mind. All ages have the opportunity to nurture their love of reading, find diverse and relevant resources for entertainment and enrichment, and strengthen community networks.”

6. On page 13: C2. *“There is not enough money in our current economic climate for everything the JPB and the SCPL needs to do today:*

- *there are three loans to pay off and significant rent for the headquarters building*
- *there are plans to build new libraries in Scotts Valley, Capitola, and Felton; in addition to building and equipment costs, there will be moving expenses and additional ongoing staff and utility expenditures because of the increased square footage”*

Bullet one: In fact the debt load for the Library is quite low.

Bullet two: Moving expenses are minimal for Scotts Valley. There are also NO additional staff expenses. Current rent is \$84,000 per year. Utilities are not expected to reach that level. So, in essence the new Scotts Valley Library is going to cost us less to operate than the current facility. While we would like to build a new library in Felton there are no funds available to do so. Plans at this time are conceptual. Capitola is in the planning stages and will not have a new building for at least 2-3 years at the earliest.

7. On page 14: C4. *Library administration and staff have failed to expand the use of volunteers to provide more regular open hours for patrons.*

Since I arrived last July we have greatly expanded our use of volunteers by the creation of over 28 job descriptions. The Library cannot use volunteers in positions that are essential to library operations for a variety of reasons that are explained fully in a report given to the Library Board in June 2010 . The volunteer report is attached and I ask that it be made part of the public record as part of my response. They are used to enhance service and to free staff for more essential functions. This does not always correlate to additional open hours.

8. On page 16: *"2. The Grand Jury particularly commends the technical services employees of the library for accomplishing so much with so little for so long."*

I believe this reference to technical services employees is meant to be a reference to the Library Information Technology employees. The technical services staff is cataloging and processing and they have not experienced shortages in resources.

Findings

Pages 4-5 F1. Including the three new libraries described below, the Master Plan calls for the construction of over 34,000 square feet of library space over the next several years.

- *Capitola was without a library from the mid-1970's, when the original library was closed due to Proposition 13 cutbacks, until 1999, after the passage of the Measure B sales tax for the libraries. The current library is considered an interim library; it's about 4,300 square feet and is not a permanent building but rather six portable structures tied together by the roof and floor. In 1987 Capitola signed a redevelopment agreement with the County that obligates the city to begin construction by 2018 of a 7,000 square foot facility that the SCPL would operate.*

Agree

- *The Felton library is a 1,250 square foot deconsecrated church. There is no disabled access, staff workspace, or storage area. There is only street parking. The entrance is up two flights of hillside stairs, making access difficult for parents with young children and seniors. There is little space for comfortable seating or study carrels. Public school class visits are not possible due to the small space. The collection is small, crowded, and inadequate. Nevertheless, the Felton library has a community of fierce supporters. Due to the gross inadequacies of the facility the JPB adopted a resolution in April 2008 identifying the Felton branch as the SCPL's highest capital project priority, planning an 8,800 square foot facility for the area population of 16,000. However, despite a bequest of \$146,000 and the donation of the land for the library, it is estimated that another \$5.5 million might be needed to actually build the library.*

Partially agree: We have done a bit of “remodeling” and opened up space. The collections are not crowded anymore. It is also not inadequate for the size building it is and patrons have the system collection at their fingertips. There are book discussion groups and story times that do meet in this facility. Class visits might be possible depending on the size of the class.

- *Scotts Valley has had a library since 1953. The branch currently occupies 5,300 square feet rented in a shopping center. However, within the next year the library will be moving to a space of about 12,500 square feet in a remodeled building the city of Scotts Valley has purchased through a redevelopment agreement with the County. The Scotts Valley chapter of the Friends of the Library has launched an ambitious campaign to raise \$250,000 to outfit the library interior.*

Partially disagree: The new library is actually 13,150 square feet. The base bid will cover a great deal of the interior. The Friends are fundraising for additional items.

Page 5: F2. *In addition to the capital improvements described in F1 above, there are the routine maintenance and extraordinary repairs required by the library facilities and vehicles. In just the last few months, the library staff had to deal with:*

- *a leaky roof affecting a light panel in Capitola, which caused the staff to delay opening the library for the day because of safety concerns*
- *cleanliness and plumbing problems in Branciforte and Capitola*
- *a T1 data line in Capitola malfunctioning for three days, resulting in 42 crates and 6 book trucks of materials needing to be transported to Live Oak for processing*
- *lights and alarms causing problems in Live Oak from October 2009 to January 2010*
- *the need to install an underfloor water detection system at Live Oak*
- *the heating/air conditioning system in Live Oak is a perpetual problem*
- *irrigation problems at Live Oak that have resulted in high water bills*
- *a leaky window and graffiti in Garfield Park*
- *the bookmobile out of service twice in two months because of transmission problems*
- *electric bills for headquarters that are unexpectedly high*

Disagree: I was not asked to comment on this finding but I disagree with how this is presented as well as some of the facts. Any facility is going to have building maintenance issues. The ones mentioned above are standard for any facility. The

bookmobile did have transmission problems but these were covered under warranty and the Library did not incur any costs for fixing it. Any vehicle is going to have maintenance issues. Electric bills for Headquarters are extremely low as it is a solar building. What was unexpected was that at the end of the first year of operation there was a "true up" bill for the month of June. Even with that bill, utility costs for a 14,014 square foot facility average about \$486 per month. In its previous 12,313 square foot facility, utility costs were \$5,083 per month; a 90% decrease.

Pages 5-6 F3. The community of La Selva Beach, unhappy with the local branch schedule and concerned that the SCPL's financial problems might trigger the decision to close the branch altogether, proposed that its Friends chapter might fund the purchase of self checkout equipment and supply volunteers who, after training, would supplement the staff and allow the library to be open more hours. While library policy requires at least two employees to staff any open library, the hope was that administration would agree that one employee, self checkout, and a volunteer might be adequate. Administration did agree and this proposal is under development; union agreement is necessary for implementation.

Partially agree: The Santa Cruz Public Library Friends funded self check machines for the entire system not the local chapter. The only reason La Selva can operate with one staff and one volunteer is because volume of circulation is so low that only one staff member is needed. The volunteer is there for "security" purposes, not to provide direct public service.

Page 6 F4. Technical services staff state that library technology has been under-funded for several years, perhaps by as much as \$500,000 to \$700,000 per year.

Partially disagree: First, I believe this is meant to be Library Information Technology staff not Technical Services. They are two different divisions. I am not sure where that number comes from. We estimate that \$100,000 is needed for PC replacement each year. A new ILS is in the neighborhood of \$200,000 but is one time expenditure with annual maintenance fees of about \$30,000.

Page 6 F5. A new ILS, which could cost upwards of \$200,000, would enable several improvements in library operations, such as the adoption of the floating collection, now considered a library "best practice"; computer-printed hold slips (library staff handwrite over 200,000 hold slips annually); and automated check in.

Partially agree: Floating collections are not considered a best practice. It is something that works in some systems but is not at the level of a best practice. It does hold some promise for a system of our size, however. Automated check in is not dependent on a new ILS.

Page 6 F6. *Only three libraries in the SCPL system currently offer self checkout: Aptos, Live Oak, and Scotts Valley. Sadly, very few people are using it, just about 8 % of patrons compared to 60% in Watsonville and Los Gatos and about 95% at the San Jose libraries. Efforts to convert to self checkout have been handicapped by the need to add barcode labels to outside book covers, a time-consuming and costly exercise; labels originally were put inside the books.*

Partially Disagree: Live Oak has achieved 84% self checkout since it was instituted in a serious way in April 2010. There is a rollout plan whereby all branches will be using self checkout by December 2010. Previous attempts to do so had many barriers which are being corrected. Rebarcoding is happening just before each library goes to self check. We are using ARRA paid workers through September and then volunteers. I question the 95% figure. The industry benchmark is 80%. San Jose does have the advantage of an aggressive building program which enabled them to build branches with self checkout integrated into the design. Scotts Valley will be built to this standard.

Page 6 F7. *The SCPL has about 150 computers in the ten branches for public use. This number of computers compares favorably with comparable library systems. The technology department is in the process of slowly replacing old equipment with newer refurbished terminals with multimedia capability.*

Agree

Page 6 F8. *The new Scotts Valley library is anticipated to be the first "real 21st century" library in the SCPL system. There will be lots of computers, with both wired and wireless connection to the internet, lots of bandwidth, and fiber. There will be two large LCD presentation screens and projection equipment. There will be single point of service and four self checkout stations, and space for automated materials handling equipment, although this equipment will not be purchased at this time.*

Partially disagree: All our branches offer wireless capabilities. The LCD screens and projection equipment are dependent on Scotts Valley Friends fund raising.

Page 7 F9. *It is library policy that a volunteer cannot check out books to patrons. Government Code Section 6267 is cited as the basis for this policy. However, this code does not explicitly exclude volunteers from checking out books for patrons, nor is there case law which would prohibit their doing so. Code Section 6267 reads:*

"All registration and circulation records of any library which is in whole or in part supported by public funds shall remain confidential and shall not be disclosed to any person, local agency, or state agency except as follows:

(a) *By a person acting within the scope of his or her duties within the administration of the library.*

(b) *By a person authorized, in writing, by the individual to whom the records pertain, to inspect the records.*

(c) *By order of the appropriate superior court.*

Partially agree: The confidentiality of library patrons is legally protected by the State of California. Staff undergoes background and fingerprint checks before being hired and undergo quite a bit of training regarding the issue of confidentiality. This is not an area we treat lightly. There is an issue of public trust and allowing volunteers to access information considered confidential by our patrons and protected thereby by law is an area of great concern. Checking out materials is considered a core and basic service and libraries, in general, do not entrust this type of service to volunteers. Signing a confidentiality agreement is a weak form of protection since there are no sanctions to be taken against a volunteer who violates patron confidentiality. Paid employees risk their livelihood and references to secure another job; volunteers can only be asked to not volunteer anymore.

Page 7 F10. The SCPL does not have a volunteer organization under the library administration. Instead, volunteers are part of the Friends group, which has a paid member who works 20 hours a week interviewing prospective volunteers and matching them with appropriate library tasks. Volunteers do fill out applications and sign confidentiality agreements.

Partially disagree: Not all volunteers sign confidentiality agreements.

Page 7 F11. With the current procedures for recruitment and training, volunteers suffer a bad reputation with library personnel. Some staff consider volunteers to be unreliable, prone to mistakes, or lax in fulfilling their obligations. Nevertheless, library administration states that the more than 14,000 hours of work accomplished by volunteers this past year were greatly appreciated.

Partially disagree: this is too strongly stated. Volunteers do not have a bad reputation with staff. Staff is too taxed to take on any additional responsibility that using volunteers more than they already do would require. There is also very little support available for when a volunteer isn't working out.

Page 7 F12. It is library policy that volunteers can only assist staff; they cannot replace staff. A volunteer can perform one task but not all tasks that constitute a job description. This reflects the library system's agreement with the unions.

Agree: This is also library and city policy on the role of volunteers. It is a past practice with the unions more than a formal agreement.

Page 7 F13. *Volunteers need to be trained and they need to be supervised; these needs require staff time and attention, and consequently there are costs associated with the use of volunteers.*

Agree

Page 7 F14. *The Friends recently expanded the list of current volunteer needs posted on its web site. It does not include checking out books, however, which limits the possibility of using volunteers to keep the libraries open more hours*

Partially disagree: Thinking that using volunteers to check out is the only way they can help libraries stay open more hours is way too narrow. There are many functions that volunteers can help with that might eventually result in being able to be open more hours. We need staff devoted to volunteer coordination as stated in Finding 13 to explore this. Until that happens, even if we were to use volunteers to check out books, we would not be able to do so without staff to manage the volunteer function.

Page 8 F15. *What was discovered through the planning process was not a surprise: library patrons use their local libraries, but they also enjoy visiting other libraries in the system. This is supported by the data in the chart that follows on page 9 illustrating where people from each community check out their library materials. These percentages are based on numbers from the 2007/08 fiscal year, before the serious reduction in open hours.*

The first, second, and third most frequently used libraries (in terms of circulation) for each residential area are color-coded. You can see that patrons from all communities in the county check out books from the Central library, with the Aptos and Scotts Valley branches being second and third most popular.

Agree

Page 8 F16. *There was considerable consistency in library service priorities, with reading, viewing, and listening for pleasure; lifelong learning; creating young readers; and connecting with the online world being generally the highest ranked. One notable contrast was the attitude of some among the more mature population who favor local branches and believe libraries must be about books and personal service, while others among the younger population suggest that there will be fewer branches in the future and libraries will be less about books and more about technology. Everyone, regardless of age, wants the libraries open many more hours and on regular schedules.*

Agree

Page 10 F17. *One important part of the Strategic Plan is the section entitled "Change for the Future," a description of five current trends in public library services that the SCPL has identified and committed to in the coming years as it pursues its vision of Transforming lives and supporting communities. Succinctly, the five trends are:*

1. *Patrons get service at the level they want – more self-service in checking out materials, placing and picking up holds, editing own accounts, paying fines; and single point of service,*
2. *Rebranding and marketing – establishing the library as a relevant resource through evolving services and better marketing of those services,*
3. *Local focus – providing local content that is unavailable elsewhere and taking library services outside into the community,*
4. *Remote delivery of services – associated with self-service; downloadable materials, e-books, podcasts; online payment of fees, and*
5. *User involvement – use of social media like Twitter, Facebook, and Wikis.*

Agree

Page 10 F18. *Despite the budget problems, the SCPL offers an amazing range of outreach programs and in-house events. Through the efforts of library employees and Friends volunteers, there are programs for special populations like toddlers and young readers, students of all levels, teens, film and gaming enthusiasts, the elderly, the sight impaired, and the developmentally disabled. There are special holiday events, including pumpkin carving and gingerbread workshops. Programs and Partnerships was begun in September 2009, involving local businesses in library activities. It includes the "Book Wish List" being supported by local bookstores. Other businesses have held fundraisers, and still others have partnered with the library in offering parents and children in-store workshops and story-times.*

Agree: However, the Programs and Partnerships Division was established for more than just involving local businesses. It was established to bring under one roof all library programming and various partnerships with all sectors of the community.

Page 10 F19. *In March 2009, after two years of generous sales tax revenues, the SCPL had no cash reserves. In April 2009, the JPB set guidelines for the FY 2009/10 budget that included establishing and maintaining ongoing cash reserves of at least 5% of its annual budget and dedicating at least 8% of its operating budget to books and media. These goals were not met in the FY 2009/10 budget, and they are not being met in the budget proposed for FY 2010/11.*

Agree: Sales taxes were projected to in FY08/09 from FY07/08 by \$27,000. In reality, they declined by \$344,000. The 8% for materials was established in the Facilities Master Plan adopted in 2008.

Page 11 F20. Over the last decade, prior and present library administrators have proposed or recommended closing from one to six branches to benefit the balance of the library system. However, in May 2009, the JPB directed library management to develop a balanced budget for FY 2009/10 that did not close any branches. They provided the same direction this April while facing even greater challenges to the system, essentially "kicking the can down the street a bit farther," in the words of one board member.

Partially Agree: In April 2010 the JPB was presented with several options that all achieved the same goal- a balanced budget for 10/11. They selected the one that did not call for closing any facilities.

Page 11 F21. The SCPL may be able to balance the budget through deep cuts in personnel and services, but there is a cash-flow problem. The City of Santa Cruz loans the library the cash for payroll and other payables; it covers the actual cash deficit between the time expenses are paid and revenues are received. Currently this loan balance averages between \$1 million and \$1.4 million. The City charges interest at portfolio rates (in April 2010, about 1.4%), but beginning with the 2011/12 fiscal year the interest will rise to portfolio rates plus 2% (about 3.4% if the portfolio rate was still 1.4%); in the meantime the City will cap the loan at \$1 million. The additional interest will add to the cost of operating the library system, and staff stated that, with a cap, some bills will not be paid in a timely manner and additional staff time and effort will be required to prioritize payments.

Partially disagree: The loan balance does not average between \$1-1.4 million. These are maximum amounts reached on several days last year not on a regular basis. The Library has also factored into its 5 year projections re-establishing the reserve to handle the cash flow issue. The line about with a cap, some bills MAY not be paid in a timely manner rather than will. Given the current situation (ending FY0910 in the black) we do not anticipate this issue occurring.

Page 11 F22. The SCPL has three loans that it must repay, with interest, and substantive rent for headquarters:

- *First, there is the working capital loan mentioned above, the advance from the City of Santa Cruz to cover the cash requirements on a day-by-day basis. This loan will be outstanding until the SCPL develops the reserves to manage its cash flow.*

Partially disagree: This is a cash flow loan that is repaid as soon as the monthly payment is received from the County.

- *Second, there is a loan associated with a Santa Cruz County overpayment, a distribution error discovered in 2005. From August 2005 through August*

2013, the SCPL must pay annual principal of \$40,293 plus variable rate interest.

Agree

- *Third, there is a loan from the city of Santa Cruz for improvements to the new headquarters building. Interest is 5%. In September 2008, the principal was \$467,303; the current loan balance is about \$430,150. The annual payment is \$60,518, and this loan will be paid off in 2018.*

Agree

- *The City of Santa Cruz purchased the building at 117 Union Street in Santa Cruz for use as library headquarters, to house administrative and technical services and outreach. The facility is shared with the Water Department, and building expenses are allocated to each according to the square footage occupied. The library's portion of the annual rent is \$287,189, until 2037 when the City's loan for the building purchase will be paid in full.*

Agree: However, it is important to note that the Library was paying \$21.89 per square foot for rent and utilities for its Headquarters building on Pacific Avenue and now pays \$20.93 per square foot for a building that is being purchased not rented.

Page 12 F23. While the library staff tabulates a wealth of data about the Santa Cruz community's library use, (visits per capita, books and materials checked out per capita and per active member; busyness and circulation and visits per open hour, et cetera), there are no established cost accounting measures to gauge the cost of operating the individual branches or the cost of specific library services. The library director prepared a one-time memo detailing the monthly and annual costs for the bookmobile in March 2010 upon request from a member of the JPB.

Agree: This statement is, however, very misleading. Establishing costs per individual branch gets very complicated. We would need to come up with a chargeback system for all administrative functions- payroll, computer support, courier service, branch supervision, programming support, acquisitions/cataloging and processing etc. this is further complicated since the smaller branches have been sharing staff with the larger branches so allocating staff time can get very fuzzy. There has really been no value in allocating costs this way particularly since revenues are not branch specific. I am not sure what specific library services are being referred to in terms of cost. Once again, there has not been any value perceived in determining the cost of a service such as materials acquisition. It isn't like we will stop doing it based on cost. We are always looking at ways to be more efficient but quantifying that in terms of service provided is not an appropriate model for this type of organization. The Library is not a business and cannot be run like one.

Page 12 F24. *Currently there are no reserves for technology repairs or improvements or for replacing the several SCPL vehicles, including the bookmobile. There are no reserves to finance facility development. There are no emergency reserves.*

Agree

Page 12 F25. *In FY 2008/09, personnel costs accounted for 73.6% of the budget, while books and materials accounted for 6.3% and technology accounted for 0.8%. Personnel costs are projected to consume 80% of the budget within a few years. While employees have been furloughed about 10% of the time this year and the furloughs will continue into the next fiscal year, retirement programs through the California Public Employees' Retirement System (CalPERS) have not been fully funded and health insurance rates are expected to rise significantly.*

Partially disagree: It isn't really correct to say that CalPERS has not been fully funded. During the period of the furlough, city and employees have been paying in based on their reduced pay. When current employees retire, the calculation will be made on their non-furlough pay which is higher. There is a slight discrepancy which is why we have decided not to continue the furlough beyond 2 years but this amount has been declared not significant enough to be concerned about at this time.

Page 12 F26. *Also in FY 2008/09, the population served per FTE was lower than the State mean (1,735 versus 3,094) and lower than comparable counties' figures. Expenses per capita were significantly higher than the State mean (\$61.90 versus \$34.69) and comparable counties' numbers. Library administration suggested this was "probably because of the relatively large number of branches we have for the population." The abundance of branches and the reported library policy that at least two employees are required to staff any open library contribute to these outsized numbers.*

Partially disagree: It was suggested that the number of branches is probably high given the small size of the county. Expenses per capita are also higher because Santa Cruz is an expensive place to live. Even so, staff in Santa Cruz do not earn as much as their colleagues over the hill. Our problem is more that the total square footage in our branches is inadequate for the size of the population. Many smaller branches are more expensive to operate than fewer but bigger branches. A staffing level of two is considered minimum for personal security reasons. We have never stated that one of those two cannot be a volunteer as long as the workload and assigned tasks are appropriate to the staffing configuration.

Page 12 F27. *Santa Cruz County has more branches, or outlets, per square mile than the comparable counties of Monterey, San Luis Obispo, and Santa Barbara. With a total area of 436 square miles in the county, the service area per outlet averages about 40 square miles.*

Agree: see comment in F26

Recommendations

Page 14 R1. The Santa Cruz Public Libraries should replace its Integrated Library System immediately. This will avoid the catastrophe that would occur if the current system suffers a terminal failure. An up-to-date ILS also will allow the automation of many activities presently being handled manually, as well as enable activities just not possible at all today.

Agree: This is currently planned for fiscal year 2010/11

Page 14 R2. The Joint Powers Authority Board and the SCPL should determine and commit to a reasonable cash reserve that will enable it to manage its cash flow and pay bills and cover payroll expenses without relying on loans from the City of Santa Cruz.

Agree: This is being taken into account when defining financial sustainability and looking at alternatives by the task force established by the JPB.

Page 14 R3. The SCPL should buy and install self checkout equipment at all the regional branches – buying the best units possible in sufficient quantity to accommodate all book and material checkout – and then aggressively promote its use to get close to the 95% use levels enjoyed by the San Jose libraries

Partially disagree: There is currently a plan to have self check in place with rebarcoding done by December 2010. Even with that I doubt we will achieve 95% self checkout. The industry benchmark is 80%. Until fines can be paid at the self checks we will not likely exceed 80% and that is not being planned until after a new ILS is in place. The culture in our community is also not one that seems to be extremely receptive so higher than 80% will take a while. It should be noted that when we do achieve 80-95% self check, the remaining transactions will be much more complicated and will definitely require staff to handle them; not volunteers.

Page 14 R4. With R1, 2, and 3 as priorities, the JPB and the SCPL should develop a balanced budget, also keeping in mind that investments in the collection (books and materials) and additional investments in technology are important to a healthy library system. The Grand Jury believes that a substantial reduction in personnel, perhaps by as much as 20 percent, might be necessary to achieve an ideal budget.

Disagree: The budget is currently balanced. The Library Board established a task force to consider alternatives that are financially sustainable. The task force needs to be allowed to do its work.

Page 14 R5. *The SCPL should make a serious investment in volunteer development. Dedicate library staff to recruit, interview, select, assign, and train volunteers. Assign volunteers consistent responsibilities. Use volunteers to greatly expand library hours, and use more volunteers to provide many of the outreach services currently handled by employees.*

Partially agree: This would take staffing that we currently cannot afford. Please refer again to the full volunteer report. Once again, the task force is likely to address this.

Page 14 R6. *The JPB and the SCPL should then develop staffing plans for the libraries, reconsidering the policy that at least two employees are needed at every open library, and including the expanded use of volunteers. Consider what library branches might need to be closed and maximize the hours at those left open. One strategy proposed by library administration in March was the closing of some branches, leaving the book and materials collections and the computers and turning the facilities over to their communities for use as reading rooms/learning centers. In some communities the recreation district might be able to manage these centers*

Candidates for conversion would be the branches in:

- *Felton, open 8 hours/week, 3.5 miles from the Scotts Valley branch*
- *Garfield Park, open 12 hours/week, 1.7 miles from the Central library*
- *Branciforte, open 14 hours/week, 1.5 miles from the Central library*
- *Capitola, open 14 hours/week, 2.3 miles from the Live Oak branch*

The La Selva Beach library would be a prime candidate for conversion to a reading room. It is open 8 hours/week and is 5.2 miles from the Aptos library. However, considering the project underway to operate with one library employee, one self checkout machine, and a volunteer, the SCPL could offer a choice to that community: to implement that project (if the union approves the plan) or for the La Selva Beach community to take over the library and operate it with volunteers as a reading room.

On the other hand, the Boulder Creek library is an ideal branch for implementing the "one staff member plus volunteers and a self checkout machine" concept. It serves unincorporated northern Santa Cruz County, serves a larger population than the La Selva Beach branch, and is 10.2 miles from the Scotts Valley library.

For a prototype of a local, all-volunteer library, communities could look at the Porter Memorial Library in Soquel. One big advantage of this possibility for the local communities is that they can maximize the number of open hours, on a schedule that is most convenient for them.

This recommendation is proposed as an intermediate-term strategy to allow the SCPL system to focus and develop the financial foundation necessary to create

long-term sustainability for a system that can be expanded again as future revenues increase.

Disagree: The Library Board established a task force to consider alternatives such as those recommended here. The task force needs to be allowed to do its work. The issue of square footage of available library space must be factored in and one cannot just look at the distance between facilities in our unique configuration.

Page 15 R7. Just as the SCPL has partnered with local businesses to enrich its collection and offer outreach programs, it should consider business partnerships/corporate sponsorships of the bookmobile. Solicit businesses to buy a bookmobile or van or to cover the annual cost of a vehicle, and allow them to wrap it with their advertising. The cost of a vinyl wrap for the bookmobile is estimated to be about \$4,000.

Partially agree: We currently have many partnerships that do enrich our programs and are always looking for mutually beneficial opportunities. Businesses generously support our summer reading program by donating prizes for all ages. Borders has done a fund raiser for us as has Peet's Coffee and Tea. Libraries need to be careful when it comes to advertising. We do not want to be viewed as partial to any one business as we serve the entire community. If a bookmobile were to have advertising on it for a company, it would still need to be recognizable as the bookmobile and not as a delivery vehicle for the company that is sponsoring it. It is not clear from this recommendation that the Grand Jury recognizes that we already do have a bookmobile. The current one does not need to be replaced for several more years.

Page 15 R8. The SCPL system should re-evaluate the policy that all services must be free to everyone. Concentrate on the key priorities. Understand the costs of extra services and charge fees to cover those costs. In fact, the SCPL should adopt good cost accounting measures so that the costs of operations are clearly understood – the costs associated with each branch, with each library service and program, et cetera.

Partially disagree: We can look at value added services that perhaps we can charge for- Interlibrary Loan or Books by Mail perhaps. Basic library service must remain free as per state law. The requested cost accounting is not necessarily a good way to go. Once again, we expect the task force to review this.

Page 15 R9. The JPB should add another two voting members: (1) a financial or accounting advisor so that the library system has an expert planner and advocate for financial sustainability, and (2) a library professional, from another nearby library system or from The School of Library & Information Science at San Jose State University.

Disagree: This expertise is already present in the City Finance Director and the Library Director. Changes such as this would require opening up the JPA agreement which is not due to be opened until 2017 and an early opening is not recommended.

Thank you for this opportunity to comment on this report.

Sincerely,

Teresa Landers
Director of Libraries
Santa Cruz Public Libraries

DRAFT