



SANTA CRUZ PUBLIC
LIBRARIES
A City-County System

LIBRARY JOINT POWERS AUTHORITY BOARD

Monday, January 10, 2011
Central Branch Community Meeting Room
224 Church Street, Santa Cruz

6:30 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA OF JANUARY 10, 2011
3. APPROVE MINUTES OF DECEMBER 13, 2010 (PG. 3-6)
4. ORAL COMMUNICATIONS
5. CONSENT AGENDA
 - A. Resolution to accept funds received from Robert Leet-Corday Trust (PG. 7)
 - B. Resolution to transfer e-rate funds
6. WRITTEN COMMUNICATIONS
 - A. Articles About Santa Cruz and California Libraries (PG. 8-17)
 - B. Patron Written Comments (PG. 18)
 - C. Articles on Libraries Nation Wide (PG. 19-26)
 - D. Monthly Narrative Reports- December 2010 (PG. 27-32)
 - E. Monthly Statistical Report (PG. 33)
7. REPORTS OF ADVISORY BODIES
 - A. Friends of the Santa Cruz Libraries, Inc. (oral)
 - B. Finance Committee Minutes and Oral Report
No Meeting in December
8. MEMBER REPORTS
 - A. Scotts Valley Report (Reed)

B. Capitola Report (Storey)

9. STAFF REPORTS

- A. November Financials (PG.34-43)
- B. Library Financing Authority Update (PG. 44-57)
- C. Calpers Letter (PG. 58-59)
- D. State LSTA Grant (oral)

10. OTHER BUSINESS

- A. Election of Board Chair and Vice-Chair (oral)
- B. Finance Committee- Membership for 2011 (oral)
- C. Verify 2011 Meeting Dates Including February Meetings (oral)
- D. Library Service Model Task Force Update (oral)
- E. Parking Lot List Review (PG. 60-61)
- F. Board Self Evaluation (oral)

11. NEXT MEETING

The next regularly scheduled meeting is Monday, February 14, 2011 at 6:30 p.m.

A study session of the Library Joint Powers Board will be held at Loudon Nelson on February 7, 2011 at 6:30 p.m. This meeting will consist of the Library Service Model Task Force Presentation.

12. ADJOURN

The Library Joint Powers Authority Board will adjourn from the regularly scheduled meeting of January 10, 2011 to the next regularly scheduled public meeting on February 14, 2011 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) 427-7706 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

December 13, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

6:00 PM RECEPTION FOR OUTGOING BOARD MEMBER, COUNCILMEMBER MIKE ROTKIN

6:30 PM PUBLIC MEETING

I. ROLL CALL

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

Absent: Supervisor Mark Stone

Staff: Teresa Landers, Director of Libraries

II. APPROVAL OF MEETING AGENDA OF DECEMBER 13, 2010

Citizenmember Rotkin moved, seconded by Supervisor Pirie

that the Board approve the agenda of December 13, 2010.

UNAN

Absent: Stone

III. APPROVE MINUTES OF NOVEMBER 1, 2010

Citizenmember Rotkin moved, seconded by Supervisor Pirie

that the Board approve the minutes of November 1, 2010.

UNAN

Absent: Stone

Abstain: Storey

VI. ORAL COMMUNICATIONS

None

VII. CONSENT AGENDA

A. New ILS Vendor Selection

Citizenmember Rotkin moved, seconded by Councilmember Reed

that the Board approve Equinox as vendor to provide migration services to Evergreen, an open source Integrated Library System (ILS).

UNAN

Absent: Stone

B. Resolution to Amend Personnel Budget for FY 10/11

Citizenmember Rotkin moved, seconded by Councilmember Reed

that the Board adopt Resolution #2010-015 amending the FY 10/11 Personnel Budget by reducing an Administrative Assistant II position from a 40 hour FTE to a 20 hour FTE.

UNAN

Absent: Stone

VII. WRITTEN COMMUNICATION

A. Articles About Santa Cruz and California Libraries

Supervisor Pirie asked that the editorial written by the Board be included in next month's packet.

B. Patron Written Comments

The Board would like to pull the letter from Cindy Jackson to discuss at a future meeting.

- C. Articles on Libraries Nation Wide
- D. Monthly Narrative Reports-November 2010
- E. Monthly Statistical Report
- F. Unique Management

VIII. REPORTS OF ADVISORY BODIES

A. Friends of the Santa Cruz Libraries, Inc.

Carole McPherson, Friends Board Member reported the following Friends' activities:

- Distributed cookie trays to each branch replacing the past practice of a staff appreciation brunch.

- Reported on list of fund development and related accomplishments through November 2010
- Grants Committee was recently formed
- Still creating the structure for the \$1 million fundraising campaign. Kick off date to be determined.

B. Finance Committee

Board members reviewed draft minutes from the November 29, 2010 meeting. This committee will not meet in December.

VIII. MEMBER REPORTS

A. Scotts Valley Report

Councilmember Reed reported to the Board that the new Scotts Valley library continues to be on budget and on time for a completion date in April 2011.

B. Capitola Report

Councilmember Storey reported the progress of the Capitola ad-hoc committee. The committee chose Critical Solutions & Kathy Page as the library programming consultant and the Capitola City Council authorized this RFQ.

IX. STAFF REPORTS

A. October Financials

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. Draft Audit Report

Jack Dilles, City Finance Director, reported on the library audit. Up to this point, there have been no management findings. The City still does not have the audit opinion and the auditors are behind in providing this information.

X. OTHER BUSINESS

A. Library Service Model Task Force Update

The Library Service Model Task Force is now meeting weekly and has currently developed six models.

Recently each group described their model in sufficient detail in order to have the futurist consultant comment on the services in the model (the futurist consultant did not focus on the

costs associated with the model). Each group will be re-working their models based on the consultant's feedback.

Each model will go through a more detailed costing analysis in January. The group also hopes to reduce the number of models.

In January, the group will also move into the evaluation stage of the process, which will include a more formal evaluation of each service model.

The report to the Board is still on track for January 31st.

B. Parking Lot List Review

December- Mid-year Budget Review (postponed until Task Force Completes its work)
January- Budget Projections (might be able to project revenue but will have to wait until a service model is chosen in order to move forward)

C. Board Self Evaluation

Postponed

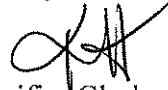
XI. NEXT MEETING

The next regularly scheduled meeting is Monday, January 10, 2011 at 6:30 pm.

XII. ADJOURN

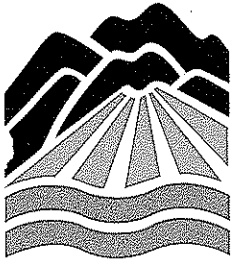
The regular meeting adjourned at 7:30 p.m.

Respectfully submitted,



Kira Henifin, Clerk of the Board

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



**SANTA CRUZ • PUBLIC
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RESOLUTION # 2011-01

**RESOLUTION OF THE
SANTA CRUZ LIBRARY JOINT POWERS AUTHORITY BOARD
ACCEPTING FUNDS AND AMENDING THE FY 2010-2011 BUDGET**

WHEREAS, a bequest of \$89,028.88 has been left to the Santa Cruz Public Library by Robert Leet-Corday Trust; and

WHEREAS, the monies have been earmarked for the Central Branch Library at 224 Church Street, Santa Cruz

NOW THEREFORE, be it resolved by the Library Joint Powers Authority Board that it accept the \$89,028.88 pecuniary gift from the Robert Leet-Corday Trust, and that it amend the FY 2010-11 Budget.

PASSED AND ADOPTED this 10th day of January 2011 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

Marked Tree Native Leaves Money to City

Thursday, December 30, 2010

By COREY CLAIRDAY DT News Staff

Robert Leet-Corday was born and raised in Marked Tree. And even though he lived most of his life in California, he never forgot his hometown. When Robert died in 2007, he left his estate to the city of Marked Tree. Now that the estate has been sold three years later, the money is finally being distributed.

Robert was born in Marked Tree on November 30, 1925. He was one of nine children born to Robert Franklin and Cora Alice Barnes Leet. Robert's father originally moved to the Marked Tree-Tyronza area from Kentucky in 1902. He owned a logging company. Later he was an overseer of cotton farming for Chapman Dewey and Company and then a heavy equipment operator for Ritter and Company.

Robert graduated from Marked Tree High School in 1943. He then graduated from Arkansas State University before volunteering for the Armed Forces during World War II. He served in the 101st and 82nd Airborne Division and was stationed in Germany.

After his stint in the Armed Forces, Robert moved to Salt Lake City, Utah, where he received his Degree in Cosmetology. From there, he moved to California, where he established the Corday Beauty College, of which he was owner and operator. Robert added the "Corday" to his name for business purposes.

Marked Tree Mayor Dixon Chandler said of Robert that "he made his fortune in California, but he never forgot his hometown."

Before his death in 2007 at the age of 82, Robert requested that he be cremated and that his ashes be returned home to Marked Tree and placed between his parents' graves. He also requested that the nearly half a million dollars from his estate be given to the city of Marked Tree. Ten percent of the estate--\$89,028--will go to First Baptist Church,

Poinsett County Democrat Tribune: Local News: Marked Tree Native...

<http://www.democrattribune.com/story/1691589.html>

ten percent will go to Second Baptist Church, ten percent will be split up among the remaining churches, ten percent will go to the Vocational School, five percent--\$44,514--will go to the Police Department, and five percent will go to the Fire Department.

Mayor Chandler said he had been following this for the last three years and is "happy for the city of Marked Tree and glad to get this finalized before the first of the year." Chandler also said that the Police department and Fire Department received their money on Tuesday.

During his lifetime, Robert Leet set up an endowment fund at Arkansas State University for two scholarships a year for nursing students in Poinsett and Craighead County. He received a Bachelor of Vocational Education in 1974, a Master of Arts Degree in 1975, and a Doctorate in Education and Psychological Counseling in 1980, all from San Francisco University. Robert loved art and had a large collection of valuable art.

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Tuesday, January 4, 2011

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Sentinel Staff Report
Article Launched: 05/19/2007 3:00:00 AM PDT

Services will be Monday for Robert "Bob" Leet-Corday who passed away at his Santa Cruz home on May 16, 2007 surrounded by his loving family and friends. Robert was born November 30, 1925 in Marked Tree, Arkansas the son of Robert Franklin and Cora Alice Barnes Leet. Robert graduated from Marked Tree High School and Arkansas State University. During World War II he was a paratrooper with the 101st and 82nd Airborne Division. He received his Degree in Cosmetology in Salt Lake City Utah. In the 1970's Robert owned and operated Corday Beauty College in Santa Cruz. In 1974 he received a Bachelor of Vocational Education, the following year he received his Master of Arts Degree both from San Francisco State University. In 1980 he received a Doctorate Degree in Educational and Psychological Counseling. Robert was preceded in death by his parents, his sisters, Roberta, Clarissa and Coveta and his brothers, Edward Leet, Joseph Leet and Elmer A. Daggette. He is survived two brothers, Marcus E. Leet of Memphis, TN and Jesse R. Leet of Perryville, AR and long time companion Paul Bergamaschi of Santa Cruz. He is also survived by numerous nieces and nephews. A memorial service will be held at Benito & Azzaro Pacific Gardens Chapel, 1050 Cayuga St, Santa Cruz, CA Monday May 21, 2007 beginning at 2:00 pm. A private interment will take place at a later date in Marked Tree, Arkansas.

In lieu of flowers contributions may be made to Hospice Caring Project, 940 Disc Dr, Scotts Valley, CA 95066.

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Charting a course for library system no easy task

NANCY GERDT, BARBARA GORSON, ELLEN
PIRIE and LEIGH POITINGER

The Santa Cruz Public Libraries, which serve all of Santa Cruz County except Watsonville, are at a turning point. The costs to operate our system as it has been operated for many years exceed the funds available.

The library's response has been to cut open hours at all 10 branches, to slash the book budget, to reduce expenses wherever possible, to lay off staff, and to implement a 10 percent unpaid furlough since 2009 for all employees.

The result has been a barely balanced budget, reduced services, staff working for less pay and declining library use. Unless significant changes are made to the operating costs, more cuts will have to be made next year, and the year after that, and the year after that.

The problem is both simple and complex. It is simple in that the costs to operate the library system — salaries, benefits, energy, books, databases, etc. — are increasing more than the revenues. This was the case before the current economic downturn and will continue for the foreseeable future without operational changes.

In 2008, revenue was \$12.5 million, primarily from sales and property taxes. Projected revenue for 2011 is \$10.9 million and is expected to remain flat for a few years after that.

The Library Joint Powers Board has struggled to balance the fiscal realities with the needs and desires of our community. Realizing that it cannot cut and furlough its way out of this dilemma, the board formed a task force to develop a range of possibilities for restructuring library expenses and services. This task force — made up of staff, board members and citizens from around the county — has been meeting since

August and is developing several different approaches to delivering library services, while ensuring the system remains financially sustainable. The board will consider the results of these efforts in early 2011.

Operating a library system is complex, with many variables affecting costs and services. As is typical with service organizations, most of the expense is in personnel costs. Another large expense is in purchasing materials to keep the collections up to date. There are also costs for each branch such as rent, maintenance and utilities. Finally, there are operations that serve the whole system such as purchasing, processing and delivery of books and other materials; computer software and hardware support; outreach to schools and senior centers; and administration.

The task force is learning about the variables involved in operating the system, as well as efficiencies and approaches that have been effective in other libraries. The goal is to return to the board and the public with choices that will ensure that our library system serves the public well, will be financially sustainable in the future, and meets the library's vision — to transform lives and strengthen communities.

The decisions on the direction of our library system are up to the board, which is made up of elected officials from the county, the cities of Santa Cruz, Capitola and Scotts Valley, and three citizen members. When the task force reports back to the board in early 2011, the discussions will be open to the public and the board will want to hear from everyone interested in the future of our library system.

Nancy Gerdt, Barbara Gorson, Ellen Pirie and Leigh Poitinger are members of the Santa Cruz Library Joint Powers Board and members of the Library Task Force.

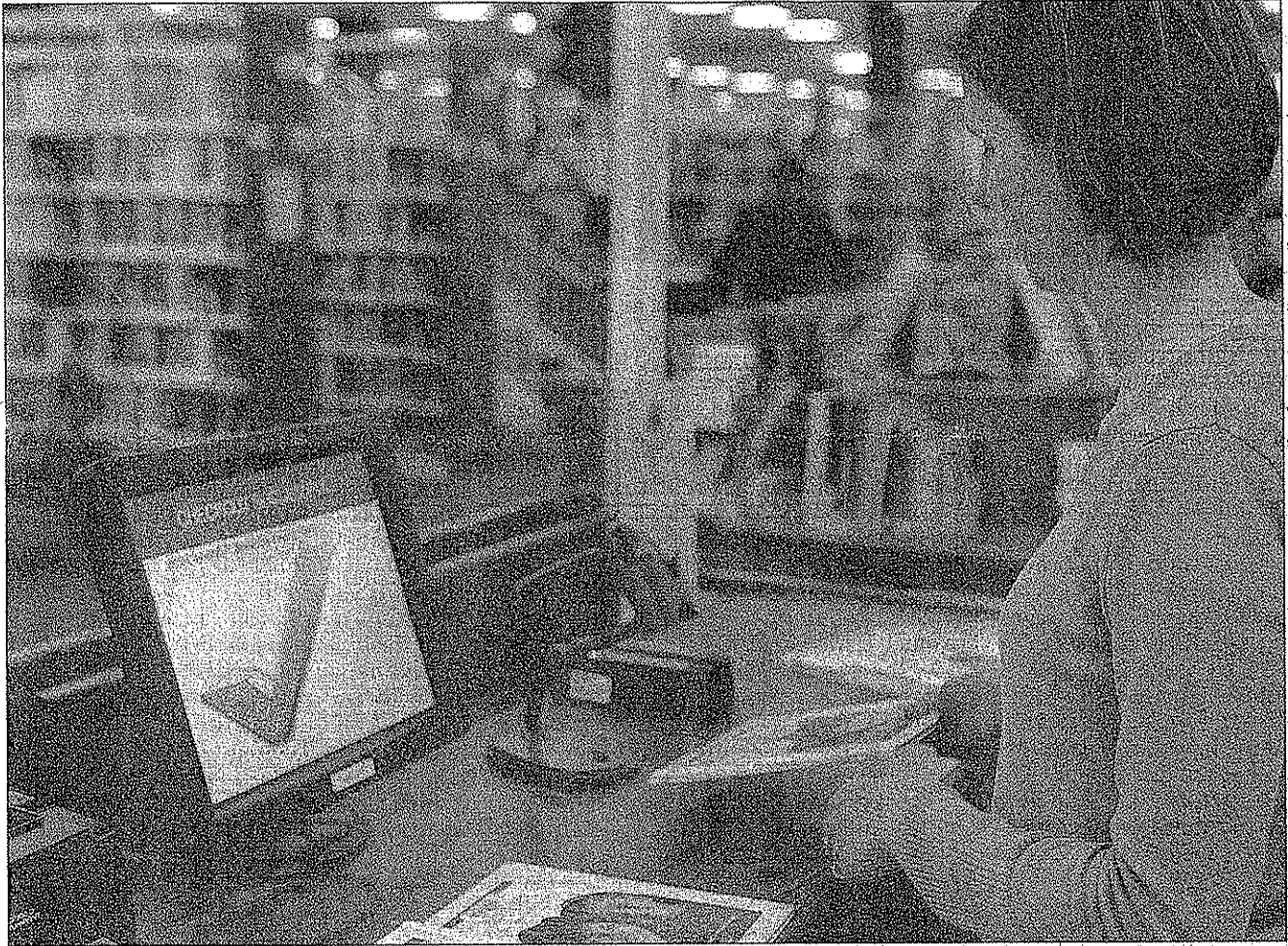
Choices are limited

You published a mean-spirited letter from someone blaming the library director for changes in library services. Anyone paying attention knows our library cannot afford the services we currently enjoy. So, what to do? A task force has been working on models for a less expensive system that maintains access and services. Documents are on the library website. The board will review these models in January. Choices are limited. All options involve significant personnel cuts because salaries are the most expensive part of budgets. It is important to notice that the board, not the library director, makes all decisions about cuts and about policy concerning how services are provided. The board's responsibility is to reach hard decisions about maintaining our libraries within budget. We have a wonderful library. It's more productive to do what we can to figure out ways to sustain our libraries than to complain and criticize.

TONI CAMPBELL, Soquel

SELF-HELP SECTION

New library checkout system reflects imminent changes



CASEY VALENTINE/SENTINEL

Aerin Martin of Ben Lomond scans a book with the new self-checkout system at the Central branch on Thursday.

Library task force to present findings next month

By J.M. BROWN

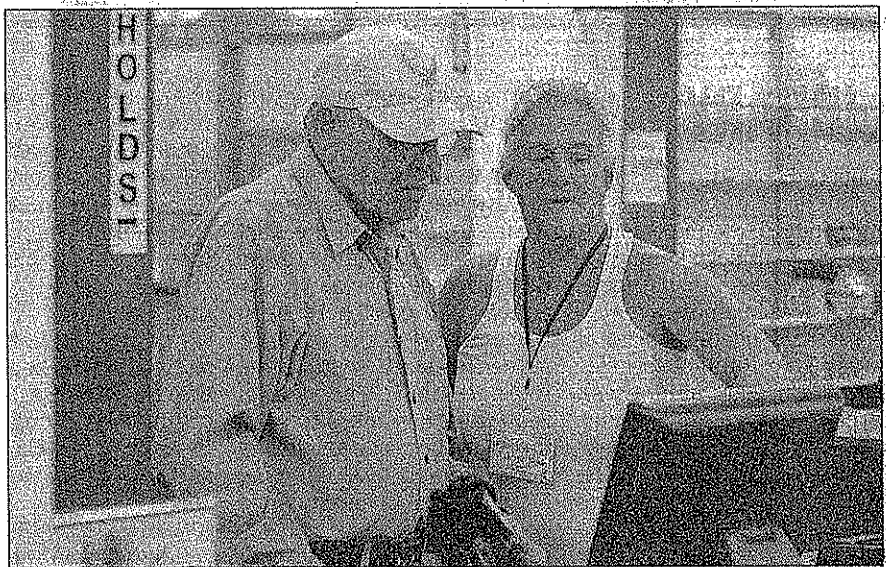
jbrown@santacruzsentinel.com

SANTA CRUZ — Luanne Watke, a volunteer at the Central library branch, watches carefully as customers approach one of four self-checkout stations. She waits to see if they need help.

Some patrons zip through the process as quickly as the last chapter of a gripping mystery novel. Others stare at the computer in utter confusion.

“There is only a small percentage of people who will not touch it,” Watke said. “People are getting the hang of it.”

Since self-checkout stations premiered at the Live Oak branch last spring, they’ve been subsequently installed — with mixed reviews — at the Central, Scotts Valley, Aptos, Branciforte and La Selva Beach branches. As a recent visit to the Central branch demonstrated, technology-savvy patrons appreciate the quick, self-serve option, while others feel more comfortable having a clerk scan their items, stamp their expiration cards



CASEY VALENTINE/SENTINEL

Library volunteer Luanne Watke, right, shows Richard Haltom of Santa Cruz how to use the self-checkout system.

and pack them off with a smile.

The cost-cutting move away from the old-fashioned checkout desk is designed to free up staff and volunteers to tackle other projects, such as acquisitions

and story reading. But the change is just one of many that the 10-branch system — which has cut hours, laid off workers

SEE LIBRARY ON A2

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LIBRARY

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and reduced new materials — is likely to undertake in coming months as it restructures how it does business.

Teresa Landers, director of Santa Cruz Public Libraries since July 2009, said a task force's study of new service models for the \$11 million system will hopefully "reflect the new realities and determine what is the new normal." She said she hopes whatever plan the library's joint Powers Board eventually approves, customers will appreciate trade-offs designed to optimize service and cost.

"Yes, people are checking out a book by themselves, but maybe they get an extra story hour," she said.

A 20-member task force made up of board members, staff and citizen members that began studying new service models in August is expected to present a wide range of options — including closing branches, increasing hours and expanding technology — in late January. After an initial public hearing on those findings, the board could immediately adopt a new plan or allow residents more time to weigh in.

In any event, Landers hopes to have a decision long before drafting a budget for June approval. Each one of the options the task force will present to the board will have

a five-year cost projection attached.

DO IT YOURSELF
 Customers have been warming up to the new self-checkout system. At the Central branch, the rate of self-checkout transactions rose to 69 percent in November, compared to 51 percent when it went online in September. The system requires customers to scan their own bar code and follow a few prompts before having their expiration card printed or emailed to them.

Jerry Vilhauer of Live Oak prefers checking out his own materials.

"Once you get used to it, it's fast," he said, noting that he appreciates the time and cost savings. "Anything that cuts costs and makes things easier for them, I'm for it."

Bur Elizabeth Kravinski of Felton, who visits the Scotts Valley branch once a week, said she doesn't like checking out her own books because "I like to talk to people." With the automated system, she said she doesn't get to interact as much with clerks when checking out videos, like the Agatha Christie film she borrowed last week.

Landers acknowledges the do-it-yourself method isn't for everyone, and that's why patrons can either ask for help or request a traditional check-out. "People who want service at the desk can still get it," she said.

The library had a lot of outside help to get the self-checkout system up and running. The Friends of the Santa Cruz Public Libraries donated \$50,000 for equipment and software and the county gave federal stimulus money to cover labor costs, which included replacing bar codes for scanning.

Landers said she expects self-checkout to be available at the Capitola branch soon. Bar coding work is ongoing at the Boulder Creek, Garfield Park and Felton branches.

SYSTEM OVERHAUL
 Landers said it is too early to quantify the savings provided by the self-checkout system. But the move clearly reflects the board's understanding that major changes must be undertaken to save the system from facing perennial choices about where to make painful cuts.

The system, which includes all libraries in the county except those in Watsonville, has cut the equivalent of 20 full-time positions as it trimmed its budget by 10 percent the past two years to soak up losses in local sales tax revenue and over-projections for fees and fines. It has had no capital reserves, and no replacement budgets for technology, vehicles, furniture and other equipment.

The system, which for many months this year borrowed cash from the city of Santa Cruz just to stay in the black, is trying to build a \$1 million reserve for addressing future

unforeseen expenses.

"There are realities that have been ignored for many years," Landers said.

The task force will look at what level of services, community programs and technology the libraries should offer, and how many staff members, volunteers and hours of operation would be required to support each model. Task force members are reluctant to identify the potential service models likely to be presented to the board before a report comes out next month.

But Landers and the board's president, Barbara Gorson, say options will include shuttering branches, an idea that has been met with fierce opposition in the past. They acknowledge the task force won't present a single option that will be popular with everyone.

"If we did, I don't think we would have done our job," Gorson said.

In the meantime, the Friends group is seeking to raise \$1 million during the next three years through direct donations and programs such as its biannual book sale at the Civic Auditorium. In November, the group raised \$18,000 selling items donated by residents and will host another sale at a date to be announced this spring. Tax-deductible donations can be made via PayPal on the group's new website at www.fscpl.org, or mailed to Friends of the Santa Cruz Public Libraries, P.O. Box 8472, Santa Cruz, CA, 95061-8472.

GOVERNMENT REVENUE

Property tax hike a boon for cities, schools

Homeowners can expect to pay slightly more next tax year

By **KURTIS ALEXANDER**

kalexander@santacruzsentinel.com

SANTA CRUZ — Local cities and schools are getting a bit of a holiday gift with a state announcement that property tax collections will be padded with a small inflationary adjustment next year.

While that may seem like obscure policy detail, the recommended 0.75 percent increase to property tax bills will translate into a few million dollars more for governments, schools and special districts in Santa Cruz County. Most have seen their tax revenues slip drastically in recent years.

“This is good news for the county,” said county Auditor-Controller Mary Jo Walker. “We will have more funds for public safety and essential services (with a higher inflation factor).”

Other bright spots have emerged on government ledgers in recent weeks as well. Fewer tax delinquencies are projected across the county this year and county property values are expected to begin leveling out next year after unprecedented declines.

The inflationary bump announced for the 2011-12 tax year, which normally doesn't make headlines, is noteworthy because the property tax rate this year was

TAX

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adjusted downward to account for a lack of inflation. That only exacerbated the huge revenue losses local governments have seen with dips in property values.

Walker notes, though, that next year's gains for government come at the expense of property owners. For every 100,000 of assessed value, property tax bills will go up by \$7.53. The increase does not apply to homes that are reassessed for the billing.

As a result of the higher bills, county agencies will yield about \$2.5 million more next fiscal year, according to the Auditor-Controller's Office. That compares to a drop of about \$800,000 in tax collections that stemmed from a negative inflation factor of 0.24 percent this year.

Proposition 13, while capping property taxes at 1 percent of assessed value, allows the state Board of Equalization to adjust taxes by an inflation factor, not to exceed 2 percent.

Property taxes are one of the most important sources of revenue for local govern-

ment.

How much property tax public agencies will actually see next year depends on the value of real estate, which has pushed the county's total tax roll down both this year and last — the first declines in at least 40 years.

County Assessor Sean Saldivia expects next year's tax revenue to be relatively flat, the new inflationary adjustment factored in.

“The rate of decline is much less than what we saw a couple years ago,” he said this week.

An official projection of next year's tax roll isn't due until spring.

The Auditor-Controller's Office is also projecting that fewer people will be delinquent on their property tax bills this tax year.

Two years ago, tax delinquencies in the county peaked at 5.6 percent, and last year they hit 5.3 percent. Based on the number of people who paid their property tax installment this month, county officials expect the delinquency rate to fall below 5 percent.

“I don't know if that means we've bottomed out in terms of foreclosures and delinquencies, but perhaps,” said Walker. “It's a slightly good sign for the economy.”

Commissioners recommended that the special tax rate be increased and expanded to include all areas served by the county library system. Doing so could generate an additional \$12 million to \$23 million every year over the next decade.

The report said polling showed that the library had probable voter support to garner the required two-thirds vote for a special tax.

The report said the library system has taken cost-cutting measures, such as renegotiating contracts with book and software vendors and cutting back on part-time staff. But the financial situation has been hampered by rising costs for books and other technology and equipment, as well as higher costs for personnel.

“Curtailment measures in recent years helped to balance the budget. However, with few alternatives for cost reductions remaining, the Public Library will have to redesign its service models,” the report said.

The report illustrates the gap between revenue and expenses: Between the 1997-98 and 2009-10 fiscal years, the special parcel tax rate increased an average of 2% a year, while the California consumer price index increased an average of 3% a year and library expenses increased an average of 10% a year.

The county library system operates more than 80 libraries and four bookmobiles.

Californians Model How to Be Standards-Bearers for Strong School Libraries

By Beverly Goldberg

It seems only fitting that a blueprint for putting strong school library programs back on the to-do lists of education leaders should emerge from California, which hasn't significantly increased its fiscal support for school libraries in at least two decades. In fact, former ALA President Patricia Glass-Schuman characterized the state as the "worst of the worst" in terms of funding for school libraries in 1992.

A call went out on the discussion list of the California School Library Association in November to urge their school board members to attend a December 3 program at the California School Boards Association annual conference. The purpose of the "Model School Libraries and Student Achievement" program was not just to reiterate the direct link between strong school libraries and the rising grades of the students who use them. Rather, the call was meant to help school librarians reframe the argument for as many decision-makers as possible so they could see clearly what was in it for them to reinvigorate their districts' school libraries.

Approved in September by the state board of education thanks to CSLA's undaunted boosterism, California's Model School Library Standards might also prove to be a focal point around which beleaguered school librarians elsewhere can regroup. Although not mandatory, the standards quantify what excellence in library service looks like: one credentialed full-time teacher-librarian for every 785 students; a weekly minimum of at least 36 hours of student access to the school library and the delivery of 20 hours of library instruction; a class-size-worth of library computers; and a collection of at least 28 library books per student with the annual addition of one book per student in K-8 and .5 books per student in high school.

Unfortunately, for many a school district around the country, such goals may seem too lofty to attain in the foreseeable future. For instance:

- Massive deficits in Michigan have forced the layoff or reassignment to classrooms of hundreds of school librarians over the past several years, with many districts having no credentialed school librarians at all. Tim Staal, executive director for the Michigan Association for Media in Education, said in the November 27 *Jackson Citizen Patriot* that the ailing Michigan economy is not the only culprit; additionally, many districts have shifted from North Central Accreditation standards, which encourage schools to employ certified librarians, to No Child Left Behind certification.
- School officials in Delaware, where 100 school librarians remain employed statewide, publicly lamented the layoffs of 25 credentialed librarians even as the decision makers proclaimed their preference for school library spaces over trained staff to teach patrons how to use and value the collections. "The critical piece is the place itself, what that can be for students and teachers," Department of Education Deputy Secretary Dan Cruce said in the November 9 *Wilmington News-Journal*.
- In an op-ed in the November 24 *New York Newsday*, Valley Stream (N.Y.) Central High School District Superintendent Marc Bernstein characterized as "antiquated" a state requirement "that all high schools have at least one full-time librarian and a minimum number of books." Who needs such obsolete resources, Bernstein seemed to sniff rhetorically, "in this internet age." The punchline: Bernstein's essay was titled "What [Gov-elect Andrew] Cuomo Can Do to Improve Schools."

Begin with data

CSLA brought decades of research about best practices to the table to compare with the sorry statistics about school library programs in California during the drafting of that state's new model school library standards. School library groups elsewhere are marshaling their numbers as well.

- The New Jersey Association of School Librarians is gathering documentation about the dire straits of school libraries there. On December 3 NJASL announced the publication of "One Common Goal:

Student Learning” ([PDF file](#)), a study that details replicates the best-practice findings of Keith Curry Lance and others as well as the fiscal tightrope upon which New Jersey’s school libraries are balancing so precariously. “Our challenge is to change the incorrect public perception of a school library as a warehouse of books to a more accurate understanding of the school library program as an active teaching and learning environment,” explained NJASL President Judith Everitt.

- In October, Pennsylvania school librarians were hailing the passage ([PDF file](#)) of a state house resolution that asks the Department of Education to complete a study by June 30, 2011, that is similar in scope to New Jersey’s. Since the 2007 abolishment of the Pennsylvania Department of Education’s Division of School Library Services, it’s become unclear how many school districts there still employ credentialed librarians—or have functioning libraries in which they could work, since school libraries are not mandated for any grade level.

While it’s hard enough to get decision-makers to agree about what constitutes an ideal service, it’s entirely another to make those ideals a reality. That’s where the “Model School Library Standards” presentation came in. According to past CSLA president Connie Williams, the panelists “built upon each other’s concepts and reiterated for the audience the importance of these things: access, staffing, responsibilities, and materials, and highlighted the necessity of full staffing—the library team—in order to make it work.”

School library leaders Doug Achterman, Barbara Jeffus, and Connie Williams took attendees from research on school libraries’ efficacy to concrete examples of how school librarians support the curriculum and teach critical thinking from kindergarten on. Long Beach Unified School District board member John McGinnis, along with LBUSD Superintendent Chris Steinhauser, bore witness to their belief in the power of school libraries. This week, Steinhauser walked the walk, recommending December 7 that the Long Beach school board approve a revised school library policy that aligns the district with the model standards. [UPDATE: The policy passed unanimously.]

Of course, one roomful of school-board members swayed by a 75-minute conference program can’t transform an entire state’s school districts by themselves. That’s why CSLA Immediate Past-President Connie Williams is encouraging her colleagues to continue evangelizing about school libraries at other nonlibrary meetings. Educators from “all subject areas would be interested in learning more about how librarians can collaborate with them in the creation of dynamic lessons,” she stressed.

American Libraries, Tue, 12/07/2010 - 19:32

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From: <webmaster@santacruzpl.org>
Date: Wed, Dec 22, 2010 at 4:57 PM
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To: webmaster@santacruzpl.org

The following message has been received from:

NAME: Trelou Lawson

[REDACTED]

To Whom it May Concern,

I am writing to express my utter disappointment for the new library check-out equipment. I wanted to cry when I saw the new machine that now has replaced my shining librarian's face. I want to say that, it does matter. I did look forward to the social contact that I had with my librarian. We are becoming more and more isolated at a community and this change may be cost effective, however, the price paid in loss of social contact is great. First it was the loss of contact with gas pump operators, next it is the loss of contact with bank tellers and the addition of atm machines, next it's the loss of grocery store cashiers and the addition of self check out, now it's the loss of librarians and more self check outs. One day we will figure out that these small social interactions contributed to making the day worth living. I miss my librarian and now the library is really not a place for feeling good anymore. Just another interaction with a machine.

Sincerely,
Trelou Lawson

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12 Ways Libraries Are Good for the Country

By Leonard Kniffel

A gift from American Libraries magazine of one dozen ideals toward which libraries strive.

Americans love their libraries, and advances in technology have multiplied the ways in which libraries enrich the quality of life in their communities. Whether they are in an elementary school or a university, a museum or a corporation, public or private, our nation's libraries offer a lifetime of learning. To library supporters everywhere—Friends, trustees, board members, patrons, and volunteers—*American Libraries* magazine offers this gift of 12 ideals toward which librarians strive as they provide comprehensive access to the record of human existence. It will take all of us, in a spirit of pride and freedom, to maintain libraries as a living reality in a free nation through the 21st century.

1. Libraries sustain democracy.

Libraries provide access to information and multiple points of view so that people can make knowledgeable decisions on public policy throughout their lives. With their collections, programs, and professional expertise, librarians help their patrons identify accurate and authoritative data and use information resources wisely to stay informed. The public library is the only institution in American society whose purpose is to guard against the tyrannies of ignorance and conformity.

2. Libraries break down boundaries.

Libraries of various kinds offer services and programs for people at all literacy levels, readers with little or no English skills, preschoolers, students, homebound senior citizens, prisoners, homeless or impoverished individuals, and persons with physical or learning disabilities. Libraries rid us of fences that obstruct our vision and our ability to communicate and to educate ourselves.

3. Libraries level the playing field.

By making access to information resources and technology available to all, regardless of income, class, or background, a public library levels the playing field and helps close the gap between the rich and the poor. Libraries unite people and make their resources available to everyone in the community, regardless of social status. There are more public libraries than McDonald's restaurants in the United States.

4. Libraries value the individual.

Libraries offer choices between mainstream and alternative viewpoints, between traditional and visionary concepts, and between monocultural and multicultural perspectives. Library doors swing open for independent thinking without prejudgment. Library collections and services offer

the historical global, cultural, and political perspective that is necessary to foster a spirit of exploration that challenges orthodoxy and conformity.

5. Libraries nourish creativity.

By providing an atmosphere that stimulates curiosity, libraries create opportunities for unstructured learning and serendipitous discovery. As repositories not only of books but of images and a wide variety of media, libraries offer access to the accumulated record of mankind with assistance from professional staff delivering these resources through the physical library, the web, and outreach services.

6. Libraries open young minds.

Children's and young adult librarians offer story hours, book talks, summer reading activities, career planning, art projects, gaming competitions, and other programs to spark youthful imaginations. Bringing children into a library can transport them from the commonplace to the extraordinary. From story hours for preschoolers to career planning for high schoolers, children's librarians make a difference because they care about the unique developmental needs of every individual who comes to them for help.

7. Libraries return high dividends.

Libraries offer big returns to the communities they serve—anywhere from \$1.30 to \$10 in services for every \$1 invested in them. Strong public and school libraries make a city or town more desirable as a business location. Americans check out an average of more than seven books a year from public libraries, and it costs them roughly \$34 in taxes—about the cost of a single hardcover book.

8. Libraries build communities.

People gather at the library to find and share information, experience and experiment with the arts and media, and engage in community discussions and games. No narrow definition will work for libraries. There is the community of scholars, the deaf community, the gay community, the gaming community, and countless others, each with its libraries and specialized collections. Libraries validate and unify; they save lives, literally and by preserving the record of those lives.

9. Libraries support families.

Libraries offer an alternate venue for parents and their children to enhance activities traditionally conducted at home by providing homework centers, parenting collections, after-school programs, outreach, one-on-one reading, and early literacy programs. Like the families they serve, libraries everywhere are adapting to meet the economic and social challenges of the 21st century. In libraries, families find professionals dedicated to keeping their services family-friendly by offering a diverse selection of materials to which people of many backgrounds can relate.

10. Libraries build technology skills.

Library services and programs foster critical-thinking skills and information literacy. Nearly 100% of American libraries offer internet access and assistance with problem-solving aptitude, scientific inquiry, cross-disciplinary thinking, media literacy, productivity and leadership skills, civic engagement, global awareness, and health and environmental awareness. Library patrons search for jobs online, polish résumés with word processing software, fill out applications, research new professions, sign up for career workshops, and look for financial assistance. Public libraries serve as technology hubs by offering a wide range of public access computing and internet access services at no charge to users.

11. Libraries offer sanctuary.

By providing an atmosphere conducive to reflection, libraries induce a feeling of serenity and transcendence that opens the mind to new ideas and interpretations. In the library we are answerable to no one. We can be alone with our private thoughts, fantasies, hopes, and dreams, and we are free to nourish what is most precious to us with the silent companionship of others who share our quest. Libraries are places where computers and databases provide superior access to information and they offer an atmosphere of light and textures that beautiful architecture and design foster.

12. Libraries preserve the past.

Libraries are repositories of community history, oral narratives, and audiovisual records of events and culture, and when these local resources are digitized and placed online as digital libraries, communities and cultures thousands of miles away can share in the experience. Libraries and information science and technology enable us to communicate through distance and time with the living and the dead. A library is a miracle kept available by the meticulous resource description and access that is the work of the librarian. Libraries preserve the record and help their patrons make sense of it in the Information Age.

Originally published as a cover story in American Libraries, December 1995. Adapted and updated by Leonard Kniffel, December 2010.

When There Is No Frigate But a Book

By Sara Zettervall

Effective outreach services permit readers to voyage beyond their limitations

Posted Wed, 12/22/2010 - 08:08

“I am writing this letter to tell you that I am personally very, very satisfied with your services at the Adult Corrections Facility. I am also grateful that I could get books ordered for me to help me take my medical board certification even while I am serving my time. I cannot stop thanking every one of you for this immense help toward my goal in life,” said one Adult Corrections Facility resident.

“At Home service is a lifeline,” said a homebound nonagenarian patron of the At Home by Mail program. “I was 5 years old when my mother first took me to get a library card. Over all of my years, my enjoyment of libraries continued to expand. Then, at 86 years of age, my eyesight no longer was good enough to renew my driver’s license. Not driving cut me off—or so I thought—from my ‘second home,’ the library. Then, to my joy, I learned of At Home service! I am now 90 years of age, and I live alone. Your knowledgeable librarians find many materials within any area of interest and send them to me.”

The ALA Code of Ethics specifies that libraries are responsible for delivering “the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.”

In the spirit of that code, Outreach Services staff at Hennepin County (Minn.) Library eagerly deploy beyond its walls to meet the needs of customers who can’t make it to the library on their own. Outreach librarians find and serve a diverse clientele, from a young man awaiting trial at the Juvenile Detention Center to an elderly woman in assisted living. The librarians practice the same skills as all librarians—listening to customers and providing reference services—but the results they see, the positive impact on the day-to-day lives of customers, are far from routine. That’s why they love their job.

A connection to life on the outside

Every Tuesday, librarian Dan Marcou leaves the library’s Outreach workroom for the world most people only get a glimpse of in movies like *The Shawshank Redemption*. Passing through double sets of security doors, he enters the Hennepin County Adult Corrections Facility (ACF), a decades-old building of barred cells bisected by a huge, echoing corridor. Striding down that corridor, he smiles and greets staff and inmates, and it’s not unusual to hear a joyful “Hey, library man!” in return. Library Services Specialist Renee Hasse soon joins him at ACF’s men’s library, where Hennepin County Library has sent 50 boxes whose contents will offer residents a rare experience of choice and freedom.

The boxes are filled with browsable magazines, fiction, and nonfiction, some of which are then distributed to the library in the women's facility as well. Almost all of the residents, though, are focused on picking up their individual requests. "Most of the inmates say they were able to read several books that ordinarily or at home they wouldn't," one ACF customer commented. "It sharpens their brain and redirects their thoughts toward more positive things." The residents arrive by the dozens in shifts throughout the day, and Marcou has mastered the art of high-speed reference, with all requests submitted on paper because inmates aren't allowed computer access. In addition to locating books and magazines, Marcou will look up reference questions and song lyrics. "One nice feature of this system is that you can take time to find the answers to questions," said Marcou. "Since we can't look up everything on the spot, I have time to do some in-depth reference work and deliver the answers the next week." One happy resident thanked the staff for "their seeming joy and obvious dedication in bringing as much of the sanity outside into the asylum as they can. And I greatly appreciate all they do. They have been my 'self educational' mentors."

Additional services help connect residents to the outside world. The "Read to Me" program encourages early literacy by audio recording a resident parent reading a children's book. A CD of that recording and the book are mailed for free to the inmate's child or grandchild. One father who participated in the program said, "It kept me alive when I was unable to be there to read to [my daughter]. I feel that we were able to still make a connection." Another father discovered a new way to spend time with his children: "I thought about how we can go to the libraries, so I sent my kids a note to let them know that when I get out, I want to go to the library with them." To help customers like him, Marcou created the Freedom Ticket newsletter, which connects inmates and their families to library materials and education that can assist with the transition back to life "on the outside."

Outreach also provides library service to two juvenile corrections facilities, the Juvenile Detention Center (JDC) and the County Home School (CHS). The service at CHS is more program-focused, because of residents' longer stays. Programs have included a teen version of Read to Me, author visits (Jacqueline Woodson, Sharon Draper, and Will Weaver), monthly booktalks, information literacy instruction, and publication of a literary magazine, *Diverse City*.

Keeping the mind active and entertained

While Patrick Jones is at the JDC, Lin Maki and Barb Holden—all Outreach librarians—may be visiting an assisted living facility, accompanied by an enthusiastic library volunteer. As they set up their display table and prepare for a booktalk, the recreation room fills with seniors and people with various disabilities. At the end of the session, the residents are thrilled to receive door prizes of bookmarks and book lights along with the library materials they will take back to their rooms. One customer recently commented, "Not only did you choose interesting excerpts to feature, but you read them so well. The background information and descriptions of the characters also piqued our desire to learn more."

Booktalks are one way to promote Hennepin County Library materials, available at 60 deposit collections in assisted living facilities, independent living sites for seniors, and nursing homes. The collections consist of a standard assortment of books and audios, which rotate every three

months. Librarians may visit each site a few times a year, but the collections are maintained by dedicated site staff or volunteers, who also pass along customer requests to Outreach staff.

County residents who are unable to use a library due to illness, disability, or visual impairment and do not live in a facility with a deposit collection can apply for At Home Service. Some customers choose to receive their library materials by mail, while others prefer volunteer delivery. The service has a tremendous positive impact on their lives. "I appreciate this service so much," said one. "Even though I am limited in body, I can keep my mind active and entertained! I am learning, I am having adventures, and I am inspired." Another customer said, "For all of my life, wherever I have lived, the public library was a source of pleasure, information, and delight. When I could no longer drive my car, I was desolate! Then I learned of At Home Service. Your thoughtful librarians seem like personal friends, although I have never met any of them. Thank you!"

At Home customers can call the At Home line during business hours and reach a librarian who provides readers' advisory and reference help. To help homebound readers "browse" new library materials, Outreach librarians created the *At Home Reader*, a newsletter that is mailed bi-monthly and also made available online as an audio file for visually impaired customers. It features book reviews by customers and staff, news of interest to those in the At Home program, a customer profile, and new releases tailored to the special needs of this group of customers; all recommendations are available in large-print format, as audiobooks on CD, or both.

For the librarians who work in Outreach Services, the effort to reach customers is exceptionally rewarding, whether they work with inmates or customers on the At Home line. Maki, for example, has worked in both settings and says understanding and listening skills are needed to work effectively with both groups, though their interests may be so different. These librarians feel they are fortunate to see, every day, how library services can improve the lives of customers. "Our services are really about quality of life," Maki says, "and we have the best job in the library."

SARA ZETTERVALL is a candidate in the master's of library and information science program at St. Catherine University in St. Paul, Minnesota. She was the Summer 2010 intern with Hennepin County Library Outreach Services.

Web-Scale Discovery

By Jason Vaughan

Connecting users with the information they seek is one of the central pillars of our profession. Web-scale discovery services for libraries are those services capable of searching quickly and seamlessly across a vast range of local and remote preharvested and indexed content, providing relevancy-ranked results in an intuitive interface expected by today's information seekers. First debuting in late 2007, these rapidly evolving tools are more important today than ever to understand.

Web-scale discovery services for the library environment are an evolution holding great potential to easily connect researchers with the library's vast information repository, whether physical holdings, such as books and DVDs; local electronic content, such as digital image collections and institutional repository materials; or remotely hosted content purchased or licensed by the library, such as e-books and publisher or aggregator content for thousands of full-text and abstracting and indexing resources. For our purposes, web-scale discovery can be considered a service capable of searching across a vast range of preharvested and indexed content quickly and seamlessly. They provide discovery and delivery services that often have the following traits:

- Content harvested from local and remotely hosted repositories to create a vastly comprehensive centralized index—to the article level—based on a normalized schema across content types, well suited for rapid search and retrieval of results ranked by relevancy. Content is enabled through the harvesting of local library resources, combined with brokered agreements with publishers and aggregators allowing access to their metadata or full-text content for indexing purposes.
- Discovery provided by a single search box providing a Google-like search experience (as well as advanced searching capabilities).
- Delivery of quick results ranked by relevancy in a modern interface offering functionality and design cues intuitive to and expected by today's users, such as faceted navigation to drill down to more specific results.
- Flexibility agnostic to underlying systems, whether hosted by the library or hosted remotely by content providers. These services are open compared to traditional library systems and allow a library greater latitude to customize the services and make them its own.

Why Web-Scale Discovery?

As illustrated by research from as far back as the 1990s, if not earlier, to as recent as 2010, library discovery systems within the networked online environment have evolved, yet continue to struggle to serve users. As a result, the library, or systems supported and maintained by the library, is often not the first stop for research—or worse, not a stop at all. Users have defected, and research continues to illustrate this fact.

Other factors, apart from user behavior and preferences, also give reasons for libraries to use web-scale discovery services. First, and most obvious, is that if something is not discovered, it

has no chance of being used. Whether a librarian conducts a reference interview, a user browses the shelves, a friend provides word-of-mouth, a user searches in Google or a library database, or a user scans issues and article titles in an electronic journal, discovery must happen, either by focused intent or serendipitously. Libraries often spend tremendous amounts of money every year to purchase or pay for access to an ever-growing body of electronic content, and the cost for access to this content often increases on an annualized basis. But for the content to be used, it must be discoverable—and for today's users, easily discoverable.

Jason Vaughan is the director of library technologies at the University of Nevada at Las Vegas. This is an excerpt from the January 2011 ALA TechSource on web-scale discovery.

MONTHLY REPORT FOR DECEMBER 2010

1. Reading, Listening and Viewing for Pleasure

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

The Felton story hour is continuing to attract families with young children. After a year without a story-time, patrons are happy to see the program resume.

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 Aptos Branch wall display case featured posters from the local United Nations Association. It included flags of the world and posters that documented "62 Universal Declarations of Human Rights" and "The Rights of a child have no boundaries."

The weekly Aptos young people's chess club is still going strong after 25 years. The current instructor is Dana MacKenzie. Dana combines his love of teaching with the joy of tournament play to keep children of all ages coming back for more! We have an exciting event planned for January! Steven Zierk, the World under 18 chess champion has accepted our invitation to speak to our chess club and we are negotiating now which Tuesday afternoon will work best for him.

The Aptos Young People's winter display continues. The autumn leaves made by young artists have fallen in soft piles where the children could still see them below the snow scene, featuring a painting in the expansive window and cut-paper collage bird feeder. The children could pluck out the leaves they made and take them home. On the first day of winter the leaves were swept away. Young Friend volunteers are creating the forms of birds for young patrons to decorate and adhere to the glass "mural." White icicle-like lights help create a frozen-winter frieze, a backdrop to winter subjects from various media about dog sledding, snow boarding, winter holidays, and more for patrons to check out.

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

The Live Oak, boulder Creek, Felton and Scotts Valley branches had displays of holiday themed books, videos, magazines and music. The Branciforte and Garfield Park branches featured children's displays of winter and holiday themed books and videos, as well as baking and winter crafts books and magazines for adults.

Boulder Creek had a display on authorship and writing skills that was up from Nov 1st to December 15th to encourage patrons to participate in the National Novel Writing Month (NaNoWriMo).

Scotts Valley patron Adira McNally wrote the branch a note saying: "Thank you for serving our community by helping us find books, organizing the library, and helping us get requests."

2. LIFELONG LEARNING

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

An Aptos library patron who frequents several of our branch libraries was very happy to learn that the library system recently purchased movie DVDs in described format. His wife is blind and they had exhausted our supply of described VHS tapes. On-Call librarian Jane Schwamberger searched our data base and discovered that the correct subject heading is "descriptive video recordings". One can get to the list by typing in "described video" and then selecting media from the drop down menu. These titles have been recently received but are not out in the branches yet. The gentleman will ask reference desk staff to request them over the next few months. He is grateful that we continuing to offer this service.

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 After School Gaming program at Boulder Creek continues to attract young teens into the library. Through this program, and access to the Homework center computers, the local kids are learning that they are a part of the library community.

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.

Rio Del Mar Elementary is gearing up for a library-card bonanza. The preparations are in the works for every student to have a Santa Cruz Public Library card. To kick off this event and other future school-library connections, the Aptos Youth Services librarian is invited to be their periodic guest at the Monday Morning Round Up, a weekly gathering

of all the faculty and students, for the purposes of beginning their school day with uplifting information and orientation.

Valencia Elementary School's library staff, Michelle Gallipeaux, having spent the whole beginning of the school year amassing interest in sustaining their "every child a library card" goal, has delivered most of this year's library card application pile to the Aptos Youth Services' Librarian. The Aptos staff is now inputting data and turning out library cards left and right. Just around the corner is the New Year when the youth services librarian will pop into the elementary school, address their students, and hand out the shiny-new library cards. On this special occasion, those who have lost their library card will receive a new one at no cost and those students who have never had a library card will learn about its uses and responsibilities.

Library staff visited Branciforte Middle School to issue library cards to students. Those students who had lost their cards were issued new ones at no cost. There were 247 cards issued in December, and the visits will continue in January until all students have had the opportunity to get a library card.

The kindergarten classes from Del Mar Elementary visited the Live Oak library this month for a tour, story, and introduction to library services. Many of the children received their first library cards, and were thrilled to use the self-check machines to check out their books

The Special Day Class at Del Mar Elementary visited the Live Oak library twice this month. The children enjoyed a story and song with ukulele music.

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

The Aptos Youth Services Librarian has renewed her connection with the Rio Del Mar Elementary and is in the midst of forging a new partnership. She has been invited to be a part of their upcoming literature night, where the library staff will meet the faculty, student body, and parents.

The Aptos Youth Services Librarian has met with Community Foundation Santa Cruz County staff and agreed to supervise one or more San Jose State university Library Science Department Interns for the purpose of organizing and cataloging the Foundation's collection, housed in their beautiful new green facility just down the street from the Aptos Branch. Staff is familiar with Luis Chabolla, who is the Foundation lead, because in the past, when the Aptos and Central Library were the recipients of the Foundation grant, he trained library staff. We are happy to renew our relationship in support of their worthwhile project.

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

Many Aptos Young Friend Volunteers are shelf reading to good effect. Singularly, some of them are stretching and expanding their literacy skills to support youth services programming by writing plays. One such script, "Hey, Diddle, Diddle," is nearing completion; it has been written, the puppets are complete, and only the stage remains to be finished.

Gail Paynter continues to supervise and train our volunteers. Live Oak has two adult volunteers, Jill and Gregg, who help with search lists, sends lists, and Annette, who continues to rebarcode and repairs damaged books. Sharon Yamanaka continues to do a wonderful job with plants; she keeps them looking healthy and beautiful besides bookkeeping for donations and book sales. Sharon sent in \$296.74 made from book sales and donations.

Our newest volunteer is Bob Tatum, who works for the City of Santa Cruz and on Sundays works two to three hours doing Live Oak Branch Landscaping.

We also have six Young Volunteers at LO, who work with Heather doing everything from cleaning shelves to making popcorn for our movie matinee.

Boulder Creek's re-barcoding project is going well with 39 volunteer hours for December.

The Scotts Valley branch benefitted from 59 hours of volunteer help during the month of December. In addition, Young Friends volunteers helped out at Scotts Valley for 7 hours during the month

4. WELCOMING PLACE

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

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

The Downloadable audio and ebook page on the library website was redesigned to reduce the number of "clicks" to access the downloadable content.

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

The end of December marks the end of the first full two months of self check-out at the Branciforte branch. Overall, our patrons appear to approve of the self service option. One patron told me that she was so happy to be able to run in, pick up her own hold, check it out herself, and be out the door in minutes. One of our elderly patrons exclaimed, "This is fun!" just this morning (12/21/10). Most people in our branch neighborhood have been exposed to the machines at Central and Live Oak, and are already proficient users. While there have been a few who have expressed anxiety over using new technology and fear that it will replace library staff, the overall mood among patrons seems one of acceptance.

Patrons visiting at the Scotts Valley branch are excited about the progress on the new branch facility. They are able to see photographic highlights of the construction process on a digital frame donated by the Friends of Scotts Valley Library.

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.

6. ORGANIZATIONAL READINESS

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

Paula Contreras viewed in Webinar to Staying Committed to Great Customer Service When Your Library is in Chaos by Pat Wagner

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

Kevin Hildreth and Cathy Landis were selected to attend Reference 2.0: How to Search Like a Pro, reference workshop.

Catherine Workman attended the workshop *Reference 2.0: How to Search Like a Pro*. Liz Pollock participated in the webinar *Serving the 21st Century Patron*. Paula Turpenen, Lauren Suhd, and Catherine Workman completed the online course *Core Reference Fundamentals*. These individuals will be sharing their new knowledge and skills with fellow Scotts Valley Branch staff in preparation for the single point of service model planned for the new branch.

In total, there were 194 staff hours spent in training in December. Training opportunities included Reference 2.0, Core Reference Fundamentals, Excelling in Any Situation, Re-energizing Your Preschool Storytime, Serving the 21st Century Patron, and Nancy Pearl Presents: Books that Make Great Gifts.

Laura Whaley attended the Infopeople workshop "Excelling in Any Situation" at the Alameda Free Library on the 14th.

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

An online discussion forum is being used by staff to discuss “best practices” when helping patrons with the self-check machines.

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

As mentioned above, many staff are preparing for the single point of service model by attending Reference training. The two day webinar “Serving the 21st Customer Patron” included the session “Staying Committed to Great Customer Service When Your Library is in Chaos.” Several staff members were able to view it, and the archived version is available.

STATISTICAL REPORT
DECEMBER 2010

Not yet available for December 2010 and December packet had November data.

Note that reference activity data in all packets to date for July through November was calculated on incomplete or incorrect information. All months will be brought up to date and corrected in the February packet.

LIBRARY JOINT POWERS AUTHORITY	
COMBINED BALANCE SHEET	
JPA FUND AND ACCOUNT GROUPS	
NOVEMBER 2010	
	JPA
	Total
Assets	
Pooled cash	604,129.15
Pooled cash interest receivable	784.23
Other interest receivable	315.46
Taxes receivable - current	521,730.00
Accounts receivable	434,301.99
Infrastructure	579,683.02
Accumulated depreciation - infrastructure	(191,370.66)
Buildings	1,758,907.67
Accumulated depreciation - buildings	(853,447.25)
Lease improvements - buildings	259,124.00
Accumulated depreciation - lease imp-buildings	(178,220.34)
Machinery and equipment	1,617,208.66
Accumulated depreciation - machinery & equip	(1,478,466.09)
Software	61,759.70
Accumulated depreciation-software	(61,759.70)
Construction in progress	78,918.85
Total Assets	3,153,598.69
Liabilities	
Accounts payable	200,696.88
Sales tax payable	551.79
Deferred grant revenue - unearned	529.84
Unclaimed funds	875.45
Payable to the County - noncurrent	80,586.11
Other intergovernmental payable-noncurrent	391,139.91
Total Liabilities	674,379.98
Equities	
Unreserved, undesignated fund balance	862,677.87
Committed - cash flow/unexpected expenditures	495,929.00
Investment in capital assets - Library	1,592,337.86
Reserved for long-term debt	(471,726.02)
Total Equities	2,479,218.71
Total Liabilities and Equities	3,153,598.69

LIBRARY JOINT POWERS AUTHORITY						
COMBINED BALANCE SHEET						
SPECIAL FUNDS						
NOVEMBER 2010						
Fund #	955	956	957	960	Spec Funds	
Fund Description	Contingency	Technology	Projects	Felton	Total	
Assets						
Pooled cash	9,433.08	4,766.31	469.57	1,133.38	15,802.34	
Pooled cash interest receivable	21.97	11.10	1.09	2.64	36.80	
Total Assets	9,455.05	4,777.41	470.66	1,136.02	15,839.14	
Equities						
Unreserved, undesignated fund balance	9,455.05	4,777.41	470.66	1,136.02	15,839.14	
Total Equities	9,455.05	4,777.41	470.66	1,136.02	15,839.14	

LIBRARY JOINT POWERS AUTHORITY					
COMBINED BALANCE SHEET					
TRUST FUNDS					
NOVEMBER 2010					
Fund #	931	932	933	934	Trust Funds
Fund Description	McCaskill Loc His	McCaskill Vis Imp	Finkeldey	Whalen	Total
Assets					
Pooled cash	259,473.80	245,310.95	9,499.75	119,061.75	633,346.25
Pooled cash interest receivable	608.42	579.36	22.28	297.04	1,507.10
Total Assets	260,082.22	245,890.31	9,522.03	119,358.79	634,853.35
Equities					
Net assets held in trust-library prog	260,082.22	245,890.31	9,522.03	119,358.79	634,853.35
Total Equities	260,082.22	245,890.31	9,522.03	119,358.79	634,853.35

Revenue Status Report
 CITY OF SANTA CRUZ
 11/1/2010 through 11/30/2010

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Account Number	Library Joint Powers Authority	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Pct Rcvd
951-41000	TAXES	5,321,475.00	521,730.00	2,349,950.47	2,971,524.53	44.16
951-00-00-0000-41211	Sales and use tax					
Total	TAXES	5,321,475.00	521,730.00	2,349,950.47	2,971,524.53	44.16
951-43000	INTERGOVERNMENTAL	70,000.00	0.00	0.00	70,000.00	0.00
951-36-00-0000-43210	State operating grants and contributions	12,000.00	0.00	12,000.00	0.00	100.00
951-36-00-0000-43310	Local operating grants and contributions	5,210,951.00	434,301.99	2,171,238.70	3,039,712.30	41.67
951-36-00-0000-43311	Maintenance of effort contributions	2,500.00	0.00	1,001.30	1,498.70	40.05
951-36-55-3531-43210	State operating grants and contributions	3,024.00	0.00	0.00	3,024.00	0.00
951-36-55-3560-43190	Federal grants - other	5,298,475.00	434,301.99	2,184,240.00	3,114,235.00	41.22
Total	INTERGOVERNMENTAL	70,000.00	0.00	0.00	70,000.00	0.00
951-44000	CHARGES FOR SERVICES	7,000.00	308.70	1,860.65	5,139.35	26.58
951-36-00-0000-44613	Internet use fee	1,890.00	161.00	841.00	1,049.00	44.50
951-36-00-0000-44630	Room rentals-library JPA	10,000.00	581.63	2,914.37	7,085.63	29.14
951-36-00-0000-44901	Photocopy fee	18,890.00	1,051.33	5,616.02	13,273.98	29.73
Total	CHARGES FOR SERVICES	200,000.00	17,385.23	85,508.98	114,491.02	42.75
951-36-00-0000-45131	Library fines	25,000.00	1,671.00	9,186.00	15,814.00	36.74
951-36-00-0000-45132	Lost library items	225,000.00	19,056.23	94,694.98	130,305.02	42.09
Total	FINES AND FORFEITS					

Account Number	Library Joint Powers Authority	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Prct Rcvd
951-46000	MISCELLANEOUS REVENUES					
951-00-00-0000-46110	Pooled cash and investment interest	-5,000.00	547.88	2,562.22	-7,562.22	51.24
951-00-00-0000-46190	Interest earnings - other	5,141.00	315.46	1,534.49	3,606.51	29.85
951-00-00-0000-46910	Miscellaneous operating revenue	9,250.00	0.00	2,765.00	6,485.00	29.89
951-00-00-0000-46990	Miscellaneous non-operating revenue	25,000.00	304.00	55,590.78	-30,590.78	222.36
951-36-00-0000-46303	Donations - library	33,000.00	3,912.00	45,457.70	-12,457.70	137.75
951-36-00-0000-46309	Donations - library - Friends of the Lib	25,000.00	13,943.53	36,069.42	-11,069.42	144.28
951-36-00-0000-46916	Cash over/short	0.00	8.68	-3.75	3.75	0.00
951-36-00-0000-46918	Damaged property recovery	0.00	1,035.40	1,068.63	-1,068.63	0.00
Total	MISCELLANEOUS REVENUES	92,391.00	20,066.95	145,044.49	-52,653.49	156.99
951-49000	OTHER FINANCING SOURCES					
951-00-00-0000-49122	From Library Private Trust Fund	40,190.00	0.00	40,190.00	0.00	100.00
Total	OTHER FINANCING SOURCES	40,190.00	0.00	40,190.00	0.00	100.00
Grand Total		10,996,421.00	996,206.50	4,819,735.96	6,176,685.04	43.83

Expenditure Status Report
 CITY OF SANTA CRUZ
 11/1/2010 through 11/30/2010

951 Library Joint Powers Authority

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	6,200.00	0.00	2,319.75	2,835.25	83.15
951-36-50-3510-52149	Interagency labor charges	603,881.00	44,515.09	211,979.00	0.00	35.10
951-36-50-3510-52199	Other professional & technical services	60,000.00	2,900.00	9,900.00	50,100.00	100.00
951-36-50-3510-52223	Vehicle operation charges - internal	0.00	73.75	73.75	0.00	0.00
951-36-50-3510-52240	Office equipment operation/maint	5,020.00	163.42	796.77	0.00	15.87
951-36-50-3510-52248	Software maintenance services	5,000.00	0.00	0.00	0.00	0.00
951-36-50-3510-52302	Travel and meetings	2,000.00	807.92	807.92	0.00	40.40
951-36-50-3510-52402	Telecommunications service - internal	0.00	4,001.97	27,454.09	0.00	0.00
951-36-50-3510-52403	Telecommunications service - outside	43,548.00	284.31	1,029.56	0.00	2.36
951-36-50-3510-52933	Liability insurance/surety bonds-outside	14,484.00	0.00	10,190.00	0.00	70.35
951-36-50-3510-52961	Dues and memberships	17,471.00	0.00	12,005.97	0.00	68.72
951-36-50-3510-52971	Printing and binding-internal	100.00	0.00	16.80	0.00	16.80
951-36-50-3510-52972	Printing and binding-outside	5,900.00	725.33	2,690.41	0.00	45.60
951-36-50-3510-52973	Moving Costs	10,000.00	0.00	0.00	0.00	0.00
951-36-50-3540-52135	Financial services - outside	550,000.00	43,140.95	203,374.19	0.00	36.98
951-36-51-3520-52131	Claims management services - outside	16,000.00	474.35	2,362.80	13,639.80	100.02
951-36-51-3520-52149	Interagency labor charges	1,214,081.00	92,854.69	442,133.96	0.00	36.42
951-36-51-3520-52244	Other equipment operation/maintenance	3,500.00	0.00	0.00	0.00	0.00
951-36-51-3520-52248	Software maintenance services	17,588.00	280.90	1,124.04	0.00	6.39
951-36-51-3520-52972	Printing and binding-outside	3,000.00	405.15	1,439.93	0.00	48.00
951-36-52-3530-52149	Interagency labor charges	4,313,404.00	316,639.93	1,522,078.41	0.00	35.29
951-36-52-3530-52244	Other equipment operation/maintenance	3,000.00	0.00	0.00	0.00	0.00
951-36-52-3530-52302	Travel and meetings	3,063.00	172.00	228.50	0.00	7.46
951-36-52-3530-52972	Printing and binding-outside	6,000.00	266.22	266.22	0.00	4.44
951-36-53-3515-52149	Interagency labor charges	225,162.00	17,153.76	81,207.15	0.00	36.07
951-36-53-3515-52201	Water, sewer and refuse	55,065.00	3,304.97	22,503.38	0.00	40.87
951-36-53-3515-52211	Janitorial services	100,000.00	6,659.56	27,876.12	0.00	27.88
951-36-53-3515-52223	Vehicle operation charges - internal	39,555.00	3,893.63	3,893.63	0.00	9.84
951-36-53-3515-52246	Building and facility o & m - outside	140,984.00	10,115.92	55,015.94	26,372.21	57.73
951-36-53-3515-52247	Landscaping maintenance services	21,145.00	1,012.76	2,225.87	0.00	10.53
951-36-53-3515-52261	Equipment, building and land rentals	393,396.00	32,933.33	173,778.65	54,672.00	58.07

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Expenditure Status Report
 CITY OF SANTA CRUZ
 11/1/2010 through 11/30/2010

951 Library Joint Powers Authority

42%
 Prct Used

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
951-36-53-3515-52302	150.00	0.00	0.00	0.00	150.00	0.00
951-36-53-3515-52932	15,500.00	1,291.67	6,458.35	0.00	9,041.65	41.67
951-36-53-3515-52933	36,506.00	0.00	30,732.00	0.00	5,774.00	84.18
951-36-54-3550-52149	550,312.00	44,088.41	204,877.84	0.00	345,434.16	37.23
951-36-54-3550-52199	29,000.00	0.00	437.50	15,562.50	13,000.00	55.17
951-36-54-3550-52248	215,038.00	3,058.50	47,481.80	6,400.00	161,156.20	25.06
951-36-54-3550-52302	55,275.00	1,355.63	14,623.47	8,260.08	32,391.45	41.40
951-36-54-3550-52302	1,300.00	296.00	532.00	0.00	768.00	40.92
951-36-54-3550-52403	111,713.00	11,191.42	45,716.84	63,213.64	2,782.52	97.51
951-36-55-3560-52149	802,600.00	57,942.84	284,687.92	0.00	517,912.08	35.47
951-36-55-3560-52302	800.00	427.50	543.00	0.00	257.00	67.88
951-36-55-3560-52304	13,975.00	3,587.28	4,870.67	0.00	9,104.33	34.85
951-36-55-3560-52306	3,024.00	0.00	0.00	0.00	3,024.00	0.00
951-36-55-3560-52960	3,000.00	0.00	0.00	0.00	3,000.00	0.00
951-36-55-3560-52972	6,000.00	17.52	829.48	0.00	5,170.52	13.82
Total SERVICES	9,722,740.00	706,036.68	3,460,563.68	241,055.48	6,021,120.84	38.07
951-53000	SUPPLIES					
951-36-50-3510-53101	12,000.00	372.20	1,747.46	0.00	10,252.54	14.56
951-36-50-3510-53102	16,200.00	2,132.22	6,795.27	0.00	9,404.73	41.95
951-36-51-3520-53106	567,000.00	91,453.38	302,675.85	0.00	264,324.15	53.38
951-36-51-3520-53107	25,000.00	137.89	17,837.70	0.00	7,162.30	71.35
951-36-51-3520-53112	120,350.00	8,598.22	21,070.28	3,125.00	96,154.72	20.10
951-36-52-3530-53109	6,500.00	0.00	1,040.15	0.00	5,459.85	16.00
951-36-53-3515-53108	2,690.00	140.60	540.51	0.00	2,149.49	20.09
951-36-53-3515-53113	18,000.00	1,387.16	5,576.32	0.00	12,423.68	30.98
951-36-53-3515-53311	157,710.00	12,050.89	67,165.58	0.00	90,544.42	42.59
951-36-53-3515-53312	20,260.00	1,065.64	3,264.03	0.00	16,995.97	16.11
951-36-54-3550-53110	20,000.00	3,488.16	6,637.44	4,782.31	8,580.25	57.10
Total SUPPLIES	965,710.00	120,826.36	434,350.59	7,907.31	523,452.10	45.80
951-54000	OTHER MATERIALS AND SERVICES					
951-36-50-3510-54990	Miscellaneous supplies and services	0.00	0.00	0.00	3,020.00	0.00

Expenditure Status Report
 CITY OF SANTA CRUZ
 11/1/2010 through 11/30/2010

951 Library Joint Powers Authority

42/10

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
951-36-52-3530-54990	2,390.00	0.00	105.64	0.00	2,284.36	4.42
951-36-54-3550-54203	0.00	0.00	358.28	0.00	-358.28	0.00
951-36-55-3531-54990	2,500.00	190.00	1,140.00	1,140.00	220.00	91.20
951-36-55-3560-54990	31,071.00	349.73	3,659.01	0.00	27,411.99	11.78
Total OTHER MATERIALS AND SERVICES	38,981.00	539.73	5,262.93	1,140.00	32,578.07	16.43
951-56000						
OTHER CHARGES						
951-36-52-3530-56995	2,000.00	119.00	909.50	0.00	1,090.50	45.48
Total OTHER CHARGES	2,000.00	119.00	909.50	0.00	1,090.50	45.48
951-57000						
CAPITAL OUTLAY						
951-36-54-3550-57410	73,000.00	0.00	16,367.86	0.00	56,632.14	22.42
Total CAPITAL OUTLAY	73,000.00	0.00	16,367.86	0.00	56,632.14	22.42
951-58000						
DEBT SERVICE						
951-36-50-3540-58140	40,961.00	0.00	0.00	0.00	40,961.00	0.00
951-36-50-3540-58190	40,293.00	0.00	40,293.07	0.00	-0.07	100.00
951-36-50-3540-58240	19,600.00	0.00	0.00	0.00	19,600.00	0.00
951-36-50-3540-58290	3,500.00	0.00	977.91	0.00	2,522.09	27.94
Total DEBT SERVICE	104,354.00	0.00	41,270.98	0.00	63,083.02	39.55
Grand Total	10,906,786.00	827,521.77	3,958,725.54	250,102.79	6,697,956.67	38.59

Expenditure Status Report
 Library Payroll Expenditures
 CITY OF SANTA CRUZ
 11/1/2010 through 11/30/2010

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
101 General Fund						
35 Library (City)						
101-35-51000 PERSONNEL SERVICES						
Total Regular full time	4,226,408.00	322,160.94	1,720,737.66	0.00	2,505,670.34	40.71
Total Regular part time	733,982.00	57,433.50	297,190.00	0.00	436,792.00	40.49
Total Overtime	3,000.00	0.00	92.72	0.00	2,907.28	3.09
Total Termination pay	0.00	139.83	2,428.22	0.00	-2,428.22	0.00
Total Temporary	520,010.00	29,036.45	171,536.26	0.00	348,473.74	32.99
Total Other pay	0.00	72.80	231.23	0.00	-231.23	0.00
Total Special vacation pay	12,600.00	11,095.32	11,095.32	0.00	1,504.68	88.06
Total Special sick leave pay	0.00	0.00	-329.16	0.00	329.16	0.00
Total Vehicle allowance	2,880.00	285.00	1,412.40	0.00	1,467.60	49.04
Total Retirement contribution	665,780.00	51,671.48	274,574.12	0.00	391,205.88	41.24
Total F.I.C.A.	69,994.00	1,395.04	8,061.61	0.00	61,932.39	11.52
Total Group health insurance	982,969.00	82,018.25	371,953.30	0.00	611,015.70	37.84
Total Group dental insurance	99,100.00	7,823.97	37,796.23	0.00	61,303.77	38.14
Total Vision insurance	17,994.00	1,419.65	6,856.51	0.00	11,137.49	38.10
Total Medicare insurance	63,836.00	5,474.94	26,782.90	0.00	35,053.10	45.09
Total Group life insurance	2,744.00	228.66	1,101.81	0.00	1,642.19	40.15
Total Disability insurance	35,300.00	2,517.89	13,567.86	0.00	21,732.14	38.44
Total Unemployment insurance	37,175.00	1,954.41	10,148.87	0.00	27,026.13	27.30
Total Workers' compensation	221,481.00	18,231.84	97,675.26	0.00	123,805.74	44.10
Total Accrued vacation - period 13	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	7,695,253.00	592,959.97	3,054,913.12	0.00	4,640,339.88	39.70

Library - Fund 951
 Month-End Cash Balances

	July	August	September	October	November	December	January	February	March	April	May	June
FY 2011 Pooled cash	72,541.96	250,794.12	312,607.59	1,397,052.22	604,129.15							
FY 2010 Pooled cash	(908,343.59)	(797,637.50)	(752,924.76)	(597,787.31)	(558,459.72)	(707,533.76)	290,832.95	(390,345.22)	(62,933.26)	15,984.66	25,912.58	120,299.01
FY 2009 Pooled cash	(1,028,955.46)	(397,327.61)	(356,999.20)	252,949.44	(714,416.36)	(711,714.61)	(812,054.05)	(668,015.42)	(595,048.05)	(543,669.74)	222,502.65	(667,431.15)
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



County of Santa Cruz

COUNTY ADMINISTRATIVE OFFICE

701 OCEAN STREET, SUITE 520, SANTA CRUZ, CA 95060-4073

(831) 454-2100 FAX: (831) 454-3420 TDD: (831) 454-2123

SUSAN MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

January 4, 2011

TO: Each Member of the Board of Directors of the Library Financing Authority

JANUARY 2011 MEETING OF THE LIBRARY FINANCING AUTHORITY

The purpose of this letter is to:

- remind you that regular meeting of the Library Financing Authority is scheduled for January 11, 2011 at 6:00 PM in the Community Meeting Room of the Central Branch Library; and
- transmit a copy of the Agenda for the meeting.

In accordance with the Authority's practice, the meeting is scheduled to occur thirty minutes in advance of the meeting of the Library Joint Powers Board.

The current members and officers of the Authority are:

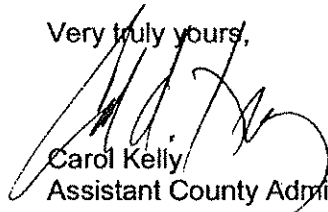
- Sam Storey City of Capitola and Chairperson of the Authority
- Jim Reed City of Scotts Valley and Vice Chairperson of the Authority
- Ellen Pirie County of Santa Cruz
- David Terrazas City of Santa Cruz
- Oscar Rios City of Watsonville

The purpose of the meeting is to approve a revised revenue estimate for the 2010-11 fiscal year and approve a preliminary revenue estimate for the 2011-12 fiscal year. The Authority's second meeting is scheduled for June 2011. The June meeting involves approving updated revenue estimates and the Authority's annual budget.

Each Member of the Library Financing Authority
January 4, 2011
Page 2

If you have any questions regarding the attached material, please call me at 454 3402. I look forward to seeing you on January 11th.

Very truly yours,



Carol Kelly
Assistant County Administrative Officer

Attachment

cc: Director of Libraries, Santa Cruz City/County Library System
Library Director, Watsonville Library
County Administrative Officer
Auditor-Controller
County Counsel
Clerk of the Board

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/

AGENDA
Library Financing Authority

Central Branch Community Meeting Room
224 Church Street, Santa Cruz
January 10, 2011 at 6:00 PM

- I. Roll Call
- II. Consideration of Late Additions or Corrections to the Agenda
- III. Consent Agenda
 - 1. Approve the minutes of meeting of June 7, 2010
- IV. Regular Agenda
 - 3. Selection of Officers for 2011

(The Library Financing Authority's By Laws provide for the rotation of the positions of Chair and Vice Chair among the Authority's Members. The rotation contained in the By Laws provides for the representative of the City of Scotts Valley serving as Chair for 2010 and the representative of the County of Santa Cruz serving as Vice Chair. The current Chair is the City of Capitola.)
 - 4. Consider Preliminary Revenue Estimate for 2011-12 and Revised Estimate for 2010-11 and Authorize Annual Audit

--Letter of Assistant County Administrative Officer
- V. Oral Communications
- VI. Report of Attorney for the Authority
- VII. Correspondence

No Items
- VIII. Adjournment

Proceedings of the Library Financing Authority
Volume 2010, Number 2
June 7, 2010
Action Summary Minutes

Voting Key: P=Pirie, C=Caput, Re=Reed, Ro=Rotkin, B=Begun; first initial indicates maker of motion, second initial the "second" to the motion; upper case letter= "yes" vote; lower case letter= "no" vote; () = abstain; / / = absent

I. **Roll Call**-Greg Caput absent

II. **Consideration of late additions or corrections to the agenda**-revised agenda packet page 8 submitted

III. **Consent Agenda**

1. APPROVED minutes of January 11, 2010

RoReB (P)/C/

IV. **Regular Agenda**

2. CONSIDERED Revised Revenue Estimates for 2009-10 and 2010-11; approved amounts in attachment 1 as the Revenue Estimate for 2010-11; AUTHORIZED the Auditor-Controller to decrease the August 2010 Library Financing Authority payment to the Santa Cruz City/Library System by \$40,945.01 and increase the Watsonville Library payment by a like amount; AUTHORIZED the County Administrative Office to execute an engagement letter with Caporicci and Larson for the annual audit at a cost not-to-exceed \$3,500

PReRoB/C/

3. PUBLIC HEARING HELD on Proposed 2010-11 Budget of the Library Financing Authority; closed public hearing; ADOPTED the Final 2010-11 Budget of the Library Financing Authority as recommended and as presented on page 17 of the agenda packet of June 7, 2010

PReReB/C/

- V. Oral Communications – None
- VI. Report of Attorney for the Authority – None
- VII. Correspondence – None
- VIII. Adjournment – The meeting adjourned at 6:24 p.m.

Attest: _____

Approved: _____



County of Santa Cruz

COUNTY ADMINISTRATIVE OFFICE

701 OCEAN STREET, SUITE 520, SANTA CRUZ, CA 95060-4073

(831) 454-2100 FAX: (831) 454-3420 TDD: (831) 454-2123

SUSAN MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

January 4, 2011

AGENDA: January 10, 2011

BOARD OF DIRECTORS
Library Financing Authority
224 Church Street
Santa Cruz, California 95060

PRELIMINARY REVENUE ESTIMATE FOR 2011-12

Dear Members of the Board:

Section 4.2 of the Library Financing Authority Agreement provides that in January of each year the County Administrative Office shall provide the Authority's Board with a report including an estimate of the funds available to the Authority for the upcoming fiscal year. Section 4.2 also provides that based on the report on funds available, the Board shall make a determination for the upcoming fiscal year of the Proposed Amount to be Distributed to qualified public libraries.

The final distribution amount for the upcoming fiscal year is then determined in June following the issuance of updated population numbers by the State and based on the latest estimates for Sales Tax and Property Tax growth.

The Revised 2010-11 and Preliminary 2011-12 Revenue Estimates show improvement for the sales tax revenue available to the Library Financing Authority.

Revenue Estimates

The table, which follows, shows:

- ✓ the Budget Amount Approved for 2010-11;
- ✓ the Revised Estimated Actual Amount for 2010-11 and the Variance from the Budget Amount;
- ✓ the Preliminary Estimate for 2011-12 and the Difference from the 2010-11 Estimate; and
- ✓ the Distribution Detail for the qualified public libraries.

**BOARD OF DIRECTORS
JANUARY 2011 REVENUE ESTIMATES**

**AGENDA: January 10, 2011
Page 2**

Library Finance Authority - January 2011 Estimates

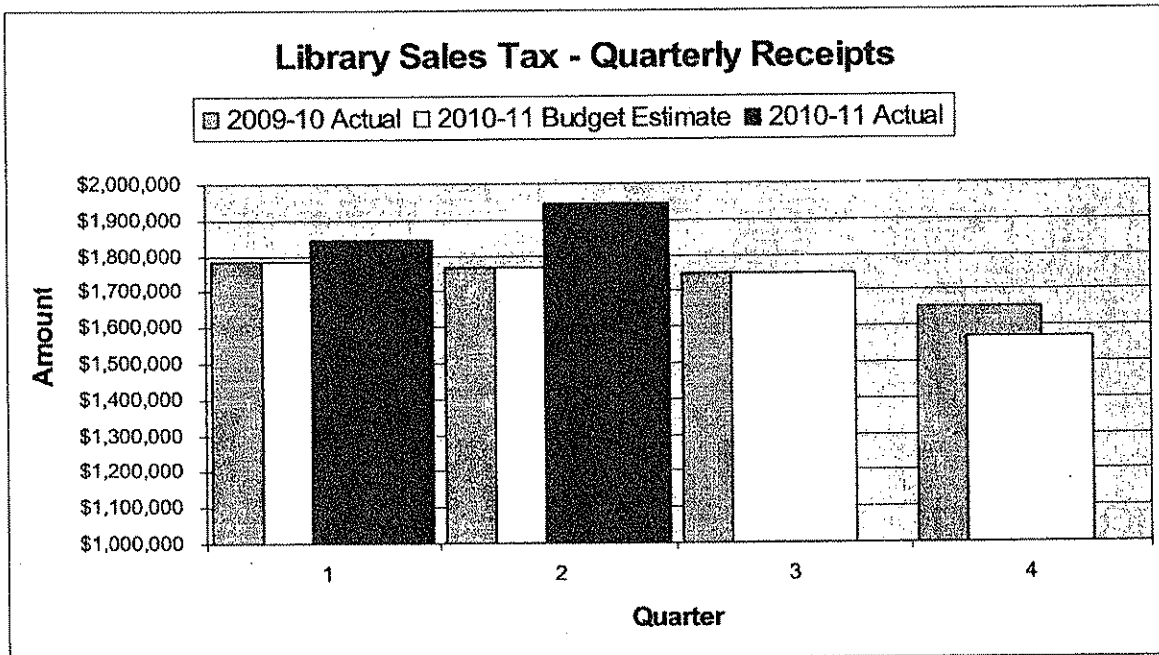
(1) Item	(2) Population %	2010-11			2011-12	
		(3) Approved Budget	(4) Jan Estimate	(5) Variance	(6) Jan Estimate	(7) Difference
Measure R (Sales Tax)		\$6,867,306	\$7,108,838	\$241,532	\$7,108,838	\$241,532
Maintenance of Effort						
City of Santa Cruz		1,394,751	1,394,751	0	1,394,751	0
City of Watsonville		541,684	541,684	0	541,684	0
County (Library Fund)		4,788,241	4,768,281	(19,960)	4,713,133	(75,108)
Interest Earnings		6,634	5,285	(1,349)	5,285	(1,349)
Total		<u>\$13,598,616</u>	<u>\$13,818,839</u>	<u>\$220,223</u>	<u>\$13,763,691</u>	<u>\$165,075</u>
Distribution Detail						
Measure R (Sales Tax)						
Watsonville Library	22.50%	\$1,545,144	\$1,599,489	\$54,345	\$1,599,489	\$54,345
Santa Cruz Library System	77.50%	5,322,162	5,509,350	187,187	5,509,350	187,187
Total	100.00%	<u>\$6,867,306</u>	<u>\$7,108,838</u>	<u>\$241,532</u>	<u>\$7,108,838</u>	<u>\$241,532</u>
Maintenance of Effort						
Watsonville Library	22.50%	\$1,513,052	\$1,508,561	(\$4,491)	\$1,496,153	(\$16,899)
Santa Cruz Library System	77.50%	5,211,624	5,196,155	(15,469)	5,153,415	(58,209)
Total	100.00%	<u>\$6,724,676</u>	<u>\$6,704,716</u>	<u>(\$19,960)</u>	<u>\$6,649,568</u>	<u>(\$75,108)</u>
Interest Earnings						
Watsonville Library	22.50%	\$1,493	\$1,189	(\$304)	\$1,189	(\$304)
Santa Cruz Library System	77.50%	5,141	4,096	(1,046)	4,096	(1,046)
Total	100.00%	<u>\$6,634</u>	<u>\$5,285</u>	<u>(\$1,349)</u>	<u>\$5,285</u>	<u>(\$1,349)</u>
Grand Total						
Watsonville Library	22.50%	\$3,059,689	\$3,109,239	\$49,550	\$3,096,831	\$37,142
Santa Cruz Library System	77.50%	10,538,927	10,709,600	170,673	10,666,861	127,933
Total	100.00%	<u>\$13,598,616</u>	<u>\$13,818,839</u>	<u>\$220,223</u>	<u>\$13,763,691</u>	<u>\$165,075</u>

Revised 2010-11 Estimate

As a result of the revised estimate for 2010-11 (Column 4), we anticipate that the total revenues available to the Library Financing Authority for distribution in 2010-11 from (1) Maintenance of Effort Contributions; (2) Measure R Sales Tax; and (3) Interest Earnings, will be \$220,223 greater than the budgeted amounts approved in June 2010.

✓ **Revised Sales Tax Revenue**

The revised sales tax estimate for 2010-11 is \$241,532 greater than the June estimate. The revised estimated is based on actual sales tax receipts for the first two quarters of 2010-11 and our estimate that receipts for the third and fourth quarters will be consistent with the amounts estimated in June 2010. The graph below shows actual receipts for 2009-10, the 2010-11 budget estimates and 2010-11 actual receipts to date.



✓ **Revised Maintenance of Effort**

The Maintenance of Effort payments for the cities of Santa Cruz and Watsonville are fixed amounts. The County Library Fund payment is a function of property tax receipts for the Library Fund. The 2010-11 County Library Fund estimate is slightly below (\$19,960) the June 2010 estimate because the Fund Balance available to finance 2010-11 was lower than anticipated.

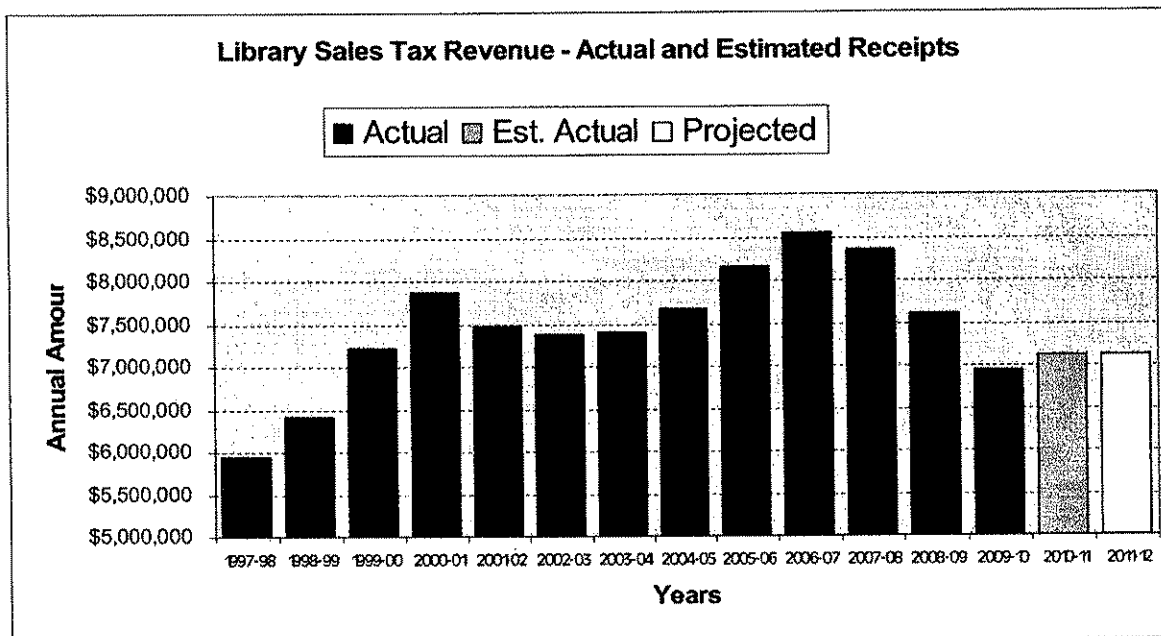
✓ **Interest Earnings**

We anticipate that 2010-11 interest earnings for the Library Financing Authority will be (\$1,349) less than the June 2010 estimate.

The Preliminary 2010-11 Estimate

The preliminary estimate for 2011-12 (Column 6) is that the total revenues available to the Library Financing Authority will be \$165,075 greater than the budgeted amount for 2010-11.

The sales tax component of the 2011-12 preliminary estimate is based on 2010-11 performance. The graph which follows provides a visual perspective on Library Sales Tax Revenues, the effect of the current recession on available financing and the 2010-11 and 2011-12 revenue estimates.



Attachment 1 provides a history for the library sales tax receipts.

The property tax component of the 2010-11 revenue estimate assumes no change in the property tax revenue available to the County Library Fund. The decrease in financing available from the County Library Fund is a result of one time funds which were available for 2010-11 and will not be available for 2011-12.

Updates

In accordance with your Board's direction this office provides an update at the end of each quarter to the members of the Authority and to the libraries and the cities. In April 2011 when actual sales tax revenue for the third quarter of the current fiscal year are known we will provide the next update. We anticipate that the Assessor will have an updated estimate for property taxes by that time.

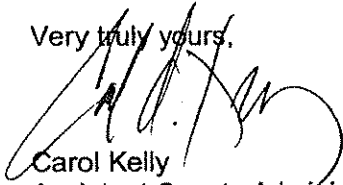
Annual Audit

The recommendations at the conclusion of this letter include your Board authorizing the County Administrative Office to sign a letter of engagement for audit of the Authority's transactions for the fiscal year ending June 30, 2011. The audit for the year ending June 30, 2010 will be presented at your June 2011 meeting.

Recommendation

At this time it is RECOMMENDED that your Board approve the amounts in the table on page 2 of this letter as the Revised Revenues Estimate for 2010-11 and the Preliminary Revenue Estimate for 2011-12 and authorize the County Administrative Office to sign the letter of engagement for the Library Financing Authority's annual audit.

Very truly yours,



Carol Kelly
Assistant County Administrative Officer

- cc: Director of Libraries, Santa Cruz City-County Library System
- Library Director, City of Watsonville
- Auditor-Controller
- County Counsel
- Santa Cruz City Manager
- Watsonville City Manager
- Santa Cruz Director of Finance
- Administrative Services Director, City of Watsonville

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Attachment 1

History of the Library Sales Tax Measure
Quarterly and Annual Amounts

3

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Library Sales Tax Receipts - Quarterly and Annual

Year	Quarter	Quarterly		Annual		
		Actual & Est.	Estimate	Actual/ Estimate	Change	% Change
1997-98	1	\$1,460,903				
1997-98	2	1,533,628				
1997-98	3	1,582,188				
1997-98	4	1,358,294		\$5,935,013		
1998-99	1	1,623,813				
1998-99	2	1,690,893				
1998-99	3	1,525,948				
1998-99	4	1,561,793		\$6,402,447	\$467,434	7.88%
1999-00	1	1,741,273				
1999-00	2	1,862,384				
1999-00	3	1,859,563				
1999-00	4	1,756,389		\$7,219,609	\$817,162	12.76%
2000-01	1	1,986,572				
2000-01	2	2,051,736				
2000-01	3	2,035,286				
2000-01	4	1,789,860		\$7,863,454	\$643,845	8.92%
2001-02	1	1,940,315				
2001-02	2	1,978,436				
2001-02	3	1,787,984				
2001-02	4	1,764,249		\$7,470,984	(\$392,470)	-4.99%
2002-03	1	1,826,667				
2002-03	2	2,032,714				
2002-03	3	1,833,704				
2002-03	4	1,686,660		\$7,379,745	(\$91,239)	-1.22%
2003-04	1	1,843,988				
2003-04	2	1,986,815				
2003-04	3	1,787,501				
2003-04	4	1,712,421		\$7,330,725	(\$49,020)	-0.66%
2004-05	1	1,969,607				
2004-05	2	1,911,909				
2004-05	3	1,983,125				
2004-05	4	1,800,041		\$7,664,682	\$333,957	4.56%
2005-06	1	1,912,226				
2005-06	2	2,298,069				
2005-06	3	2,060,642				
2005-06	4	1,878,281		\$8,149,218	\$484,536	6.32%
2006-07	1	2,124,038				
2006-07	2	2,318,897				
2006-07	3	2,098,577				
2006-07	4	1,998,430		\$8,539,942	\$390,724	4.79%
2007-08	1	2,182,266				
2007-08	2	2,182,896				
2007-08	3	2,035,609				
2007-08	4	1,953,174		\$8,353,945	(\$185,997)	-2.18%
2008-09*	1	2,112,168				
2008-09	2	2,125,649				
2008-09	3	1,795,098				
2008-09	4	1,570,743		\$7,603,658	(\$750,287)	-8.98%
2009-10	1	1,783,988				
2009-10	2	1,764,882				
2009-10	3	1,747,693				
2009-10	4	1,650,856		\$6,947,419	(\$656,239)	-8.63%
2010-11	1	1,845,994	1,783,988			
2010-11	2	1,944,408	1,764,882			
2010-11	3		1,747,693			
2010-11	4		1,570,743	\$6,867,306	(\$80,113)	-1.15%

* The amount for the 1st quarter includes the cost of the Measure R Election.
 Estimated cost of the election was \$275,000. Actual cost of the election was \$198,267.
 * Bold Amounts are Estimated Actual.

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County of Santa Cruz

COUNTY ADMINISTRATIVE OFFICE

701 OCEAN STREET, SUITE 520, SANTA CRUZ, CA 95060-4073

(831) 454-2100 FAX: (831) 454-3420 TDD: (831) 454-2123

SUSAN MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

January 4, 2011

TO: Each Member of the Board of Directors of the Library Financing Authority

JANUARY 2011 MEETING OF THE LIBRARY FINANCING AUTHORITY

The purpose of this letter is to:

- remind you that regular meeting of the Library Financing Authority is scheduled for January 11, 2011 at 6:00 PM in the Community Meeting Room of the Central Branch Library; and
- transmit a copy of the Agenda for the meeting.

In accordance with the Authority's practice, the meeting is scheduled to occur thirty minutes in advance of the meeting of the Library Joint Powers Board.

The current members and officers of the Authority are:

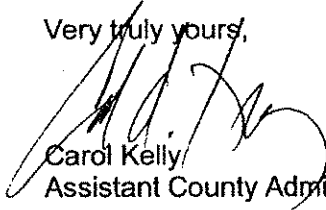
- Sam Storey City of Capitola and Chairperson of the Authority
- Jim Reed City of Scotts Valley and Vice Chairperson of the Authority
- Ellen Pirie County of Santa Cruz
- David Terrazas City of Santa Cruz
- Oscar Rios City of Watsonville

The purpose of the meeting is to approve a revised revenue estimate for the 2010-11 fiscal year and approve a preliminary revenue estimate for the 2011-12 fiscal year. The Authority's second meeting is scheduled for June 2011. The June meeting involves approving updated revenue estimates and the Authority's annual budget.

Each Member of the Library Financing Authority
January 4, 2011
Page 2

If you have any questions regarding the attached material, please call me at 454 3402. I look forward to seeing you on January 11th.

Very truly yours,



Carol Kelly
Assistant County Administrative Officer

Attachment

cc: Director of Libraries, Santa Cruz City/County Library System
Library Director, Watsonville Library
County Administrative Officer
Auditor-Controller
County Counsel
Clerk of the Board

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Actuarial Office
 P.O. Box 1494
 Sacramento, CA 95812-1494
 TTY for Speech and Hearing Impaired - (916) 795-3240
 (888) CalPERS (or 888-225-7377) FAX (916) 795-3005

October 2010

MISCELLANEOUS PLAN OF THE CITY OF SANTA CRUZ (EMPLOYER # 196)
Annual Valuation Report as of June 30, 2009

Dear Employer,

As an attachment to this letter, you will find a copy of the June 30, 2009 actuarial valuation report of your pension plan. This report contains important actuarial information about your pension plan at CalPERS. Your CalPERS staff actuary is available to discuss the report with you.

Changes Since the Prior Year's Valuation

The CalPERS' Board of Administration adopted updated actuarial assumptions to be used beginning with the June 30, 2009 valuation. In addition, a temporary modification to our method of determining the actuarial value of assets and amortizing gains and losses has been implemented for the valuations as of June 30, 2009 through June 30, 2011. Finally, a cash flow analysis has been added to our process. If such an analysis indicates that funding progress will not be adequate, an additional contribution will be required.

There may also be changes specific to your plan such as contract amendments and funding changes.

Further descriptions of changes are included in the "Highlights and Executive Summary" section and in Appendix A, "Statement of Actuarial Data, Methods and Assumptions." The effect of the changes on your rate is included in the "Reconciliation of Required Employer Contributions."

Future Contribution Rates

The exhibit below displays the required employer contribution rate and Superfunded status for 2011/2012 along with estimates of the contribution rate for 2012/2013 and 2013/2014 and the probable Superfunded status for 2012/2013. The estimated rate for 2012/2013 is based solely on a projection of the investment return for fiscal 2009/2010, namely 11.0%. The estimated rate for 2013/2014 uses the valuation assumption of 7.75% as the investment return for fiscal 2010/2011. See Appendix D, "Investment Return Sensitivity Analysis", for rate projections under a variety of investment return scenarios. Please disregard any projections that we may have provided to you in the past.

Fiscal Year	Employer Contribution Rate	Superfunded?
2011/2012	15.365%	NO
2012/2013	16.1% (projected)	NO
2013/2014	18.8% (projected)	N/A

Member contributions (whether paid by the employer or the employee) are in addition to the above rates.

The estimates for 2012/2013 and 2013/2014 also assume that there are no future amendments and no liability gains or losses (such as larger than expected pay increases, more retirements than expected, etc.). **This is a very important assumption because these gains and losses do occur and can have a significant impact on your contribution rate.** Even for the largest plans, such gains and losses often cause a change in the employer's contribution rate of one or two percent and may be even larger in some less common instances. These gains and losses cannot be predicted in advance so the projected employer contribution rates are just estimates. Your actual rate for 2012/2013 will be provided in next year's report.

MISCELLANEOUS PLAN OF THE CITY OF SANTA CRUZ (EMPLOYER # 196)

October 2010

Page 2

We are very busy preparing actuarial valuations for other public agencies and expect to complete all such valuations by the end of October. We understand that you might have a number of questions about these results. While we are very interested in discussing these results with your agency, in the interest of allowing us to give every public agency their result, we ask that, if at all possible, you wait until after October 31 to contact us with questions. If you have questions, please call (888) CalPERS (225-7377).

Sincerely,



ALAN MILLIGAN, MAAA, FCA, FSA, FCIA
Chief Actuary

PARKING LOT ITEMS

TOPIC	RESOURCES/ RESPONSIBILITY	DATE
Replacing pages at volunteers at LSB	Teresa	4/1/2011 (after task force)
Branch owned collections purchased by local funds	Teresa	7/1/2011 (after new ILS)

PARKING LOT ITEMS

TOPIC	RESOURCES/ RESPONSIBILITY	DATE
Discuss budget priorities for coming year provide staff direction	Director and JPB	March
Consider draft budget	JPB	May
Adopt final budget	JPB	June
Transfer resolutions: Richardson, Finkeldey, McCaskill, Fleming and First 5	Director to JPB	July
Board Self evaluation	JPB	December
Mid year budget adjustment review	JPB and Director	December
Budget projections	Director	January
Review Annual Audit	Director and JPB	January
Appoint citizen members	JPB	January
Annual election of officers	JPB	January