



SANTA CRUZ • PUBLIC
LIBRARIES
A City County System

LIBRARY JOINT POWERS AUTHORITY BOARD

Monday, December 4, 2006 at 7:00 PM
Community Meeting Room
224 Church Street, Santa Cruz

7:00 PM CLOSED AND LITIGATION SESSION

A. Real Property (Government Code #54957.8)

187 Laurel Street, Felton
117 Union Street, Santa Cruz

7:30 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA
3. APPROVE MINUTES OF NOVEMBER 6, 2006
4. ORAL COMMUNICATIONS
5. CONSENT AGENDA
 - A. Budget Adjustment, Aptos Branch Parking Lot
 - B. 2007 Legislative Program
6. WRITTEN COMMUNICATIONS
 - A. Letter of November 27, 2006 from Beth Benjamin, President, Valley Women's Club re Felton Branch Library
7. REPORTS OF ADVISORY BODIES
8. MEMBER REPORTS

A. Headquarters Task Force (Rotkin)

B. Felton Branch Task Force (Gerdt)

9. STAFF REPORTS

A. Assignment of Leases to Joint Powers Board

B. Genealogical Society Tea Honoring the Memory of Sara Bunnett
(January 21, 2007, 2pm-4pm, Central Branch Meeting Room)

C. Automation System Upgrade Report (Technology Manager Dan
Landry)

10. OTHER BUSINESS

A. Study Session/Discussion: Staff Morning Follow-Up re Library Change:
Reports of the Staff Working Groups

The following reports were submitted by Staff Working Groups:

Marketing/Promotion of the Library (Linda Gault)
Create a More Welcoming/User-Friendly Environment (Barbara Snider)
Information/Reference Services to the Public (Merritt Taylor)
Programming/Training for the Public (Gail Mason)

In addition, oral summary reports will be made by the :

Wayfinding Task Force (Heidi Jaeger-Smith)
Classification Task Force (Anne M Turner)

11. SCHEDULE NEXT MEETING

The next meeting is scheduled for Monday, January 8, 2007. A Closed
Session regarding real property may be required.

12. ADJOURN

The Santa Cruz City-County Library System does not discriminate against persons with disabilities. Out of consideration for people with chemical sensitivities, the Library requests that you attend fragrance free. The Central Branch Library is a fully accessible facility. If you wish to attend this public meeting, and you will require special assistance such as sign language or other special devices in order to attend and participate, please call (831) 420-5600; or TDD: (831) 420-5733 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

November 6, 2006

Central Branch Community Meeting Room
224 Church Street, Santa Cruz

6:00 PM CLOSING AND LITIGATION SESSION

- I. Personnel Evaluation (Government Code §54957)
- II. Labor Negotiations (Government Code §65967.6)
- III. Real Property (Government Code §54957.8)

7:00 PM PUBLIC MEETING

I. ROLL CALL

Present: Citizen Nancy Gerdt, Citizen Barbara Gorson, Councilmember Cynthia Mathews, Councilmember Michael Termini, Councilmember Randy Johnson, Councilmember Mike Rotkin, Supervisor Mark Stone, Citizen Leigh Poitinger and Supervisor Jan Beautz

Excused:

Staff: Anne Turner, Director of Libraries
Susan Elgin, Assistant Director of Libraries

II. APPROVAL OF MEETING AGENDA OF NOVEMBER 6, 2006

Citizenmember Gorson moved, seconded by Citizenmember Poitinger

that the Board approve the agenda of November 6, 2006.

UNAN

III. APPROVE MINUTES OF SEPTEMBER 11, 2006

Councilmember Mathews moved, seconded by Citizenmember Gorson

that the Board approve the minutes of September 11, 2006.

UNAN

IV. ORAL COMMUNICATIONS

Paul Marcelin-Sampson, downtown resident and Central Library patron, addressing letter he sent to the Board pertaining to his suggestions on improving the ILL (Interlibrary Loan) services provided by the library.

Susan Elgin, Assistant Director, responded to resident stating that this is something that will be looked into in the next 6-8 weeks. In order to accommodate for this service two items will need to be looked into: staff workload and software interfacing.

V. CONSENT AGENDA

None

VI. WRITTEN COMMUNICATIONS

- A. Letter of October 4, 2006 from R. Paul Marcelin-Sampson regarding Library Interlibrary Loan Services
- B. Memo to Library Financing Authority Board Members from the Assistant County Administrator Providing a Quarterly Report on Measure B Receipts

VII. REPORTS OF ADVISORY BODIES

Pat Sandidge, Managing Director of the Friends of the Santa Cruz City-County Library System reported the following Friends' activities:

- Newsletter "Check it Out" is now being distributed
- Membership Drive
 - Mailed out 5,200 requests to new library card applicants
- Promoting Civic Sale to be held November 17th & 18th
 - Members ONLY on Friday, November 17th
- Tuesday, November 7th co-sponsor with SCPL book discussion *Then and Now: Santa Cruz Coast* with authors Gary Griggs and Deepika Ross.
- Friday, November 3rd co-sponsored with SCPL Outreach Program a luncheon to support the Book Buddy Volunteers who take books out to home bound residents
- New Board Member Introduction
 - Sherry Skold
 - Richard Lopez
 - Pat Huntsinger

VIII. MEMBER REPORTS

- A. Sara Bunnett, long time Friends Board Member, has passed away and the Genealogical Society will be organizing a Tea in January to commemorate Sarah's work with the Santa Cruz Public Libraries.
- B. Leigh Poitinger suggested the library's web team look into archiving LJPB agenda and minutes.

IX. STAFF REPORTS

A. The Director made the following reports:

- FY 2005-06 Donations/Contributions to the Library
- Updates on Capital Projects
 - Aptos Parking Lot
 - Draw up Plans and Specifications
- La Selva Beach Branch Interior Painting Project
 - Branch Closed November 10 through November 20
- Circulation in October
 - Check Outs + 6.8%
 - Major increase in Website Renewals
 - Increase in use of Electronic Books

X. OTHER BUSINESS

A. Presentation by Paul Machlis, President, Felton Library Friends. This presentation was a preview of the presentation that will be made to San Lorenzo Valley Businesses and Organizations. This presentation reviews the history of the branch and addresses the need for a new Felton Library Branch.

XI. SCHEDULE NEXT MEETING

Monday, December 4, 2006

XII. ADJOURNMENT

The regular meeting adjourned at 7:45 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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A City County System

November 27, 2006

TO: LIBRARY JOINT POWERS BOARD
FR: DIRECTOR OF LIBRARIES
RE: APTOS PARKING LOT PLANS AND SPECS

RECOMMENDATION: That the Library Joint Powers Authority Board adopt a resolution appropriating an amount not to exceed \$15,000 from available revenue for the development of plans and specifications for the Aptos Parking Lot expansion.

BACKGROUND

The Board is aware that the County Public Works Department staff estimates the cost of the Aptos Parking Lot expansion at a far greater amount than is available at this time.

It is clear, however, that if we had precise plans and specifications, we would be better able to secure competitive bids for the project. Only conceptual sketches currently exist. This is work that would need to be done whenever we proceed.

Staff therefore recommends that we request the County Public Works Department to secure detailed plans and specifications for the Aptos Branch Parking Lot Expansion Project.

BAPTOSPKG.PLA



SANTA CRUZ • PUBLIC
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RESOLUTION NO. 2006-13

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
 AUTHORITY BOARD APPROPRIATING FUNDS AND AMENDING THE
 FY 2006-07 BUDGET TO DEVELOP PLANS AND SPECIFICATIONS FOR
 THE APTOS BRANCH PARKING LOT EXPANSION**

WHEREAS, the Library requires plans and specifications for the expansion of the Aptos Parking Lot, and

WHEREAS sufficient revenue exists for appropriation for this purchase,

NOW THEREFORE BE IT RESOLVED that the Library Joint Powers Authority Board appropriate funds and amend the FY 2006-07 budget in the amount of \$15,000 to secure plans and specifications for the Aptos Branch Parking Lot Expansion Project.

PASSED AND ADOPTED this 4th day of December 2006, by the following votes:

AYES: Board Member:

NOES: Board Member:

ABSENT: Board Member:

DISQUALIFIED: Board Member:

ATTEST: _____
 Board Clerk



SANTA CRUZ • PUBLIC
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November 27, 2006

TO: LIBRARY JOINT POWERS AUTHORITY BOARD
FR: DIRECTOR OF LIBRARIES
RE: ADOPT 2007 LEGISLATIVE PROGRAM

RECOMMENDATION: That by motion the Library Joint Powers Authority Board adopt the attached legislative program for 2007, and that it request the County Board of Supervisors and the Capitola, Santa Cruz, and Scotts Valley City Councils to also actively support these measures by including them in their own legislative programs.

BACKGROUND

Attached are six legislative proposals for the coming year—two State, two Federal, and two State and Federal:

State:

- California Public Library Foundation—PLF
- Support All Types of Libraries

Federal:

- Library Services and Technology Act Funding
- Confidentiality of Library Patron Records

State and Federal:

- Telecommunications: Discounted Rates for Libraries
- Open Access to Information In Any Format

GLEGPROG.07



SANTA CRUZ • PUBLIC
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2007 STATE LEGISLATIVE SUPPORT REQUEST

CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612

TITLE: CALIFORNIA PUBLIC LIBRARY FUND--PLF

SUMMARY: The Library Joint Powers Board advocates increased funding for the California Public Library Foundation (PLF) program and opposes any reductions below the 2006/2007 budget level.

PRESENT LAW: Education Code Sections 18010-18031 provide for a Public Library Foundation fund for public libraries on a per capita matching basis with local public library jurisdictions. The per capita funding basis is to be adjusted annually as per the provisions of Education Code Section 18020. The "Foundation" of the title does not refer to a legal entity, but rather to the State's obligation to share in the basic funding of public library services.

DISCUSSION/ANALYSIS: The State has never fully funded the Public Library Fund, and the amounts approved by the Governor steadily declined over the years. In 2005-06, however, under pressure from our legislators, the Governor agreed to a funding amount that allocated \$117,591 to Santa Cruz and \$32,884 to Watsonville. With full funding, these amounts would have been \$520,458 and \$145,101 respectively. All Santa Cruz Library funds are allocated to the library materials budget; Watsonville uses the funds for improving operations and adding open hours.

One of the greatest advantages of PLF funding is that the money comes directly to the Library without the cost and workload requirements of grant applications. Additionally, funds can be used for general library operations, thereby providing needed flexibility.

FISCAL IMPACT: Severe local negative fiscal impact as noted above.



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2007 STATE LEGISLATIVE SUPPORT REQUEST

CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612

TITLE: SUPPORT ALL TYPES LIBRARIES

PROPOSAL: Encourage support for all types of libraries including public, academic, school, and special libraries, County law libraries, and the California State Library in order to promote resource sharing.

DISCUSSION/ANALYSIS: Effective library services to all the people of the State depend on resource sharing among all types of libraries. These include cooperative licensing agreements for access to commercial databases, basic telecommunications infrastructure, and access to library materials.

All types of libraries have been hit by budget cuts during the last decade. Legislation to network California's libraries electronically and through various cooperative programs was signed into law in 1998. It was never adequately funded, and was de-funded completely three years ago. School libraries were among the first programs to be cut by cash-starved local school districts. The State-funded university and community college libraries have been hard hit by funding cuts. Local law libraries are trapped in a funding mechanism that does not grow rapidly enough to meet their needs. And of course the Public Library Foundation program has been steadily under-funded since its inception.

Both the Santa Cruz City-County Library and the Watsonville Public Library have been active participants in the resource-sharing activities of the Monterey Bay Area Cooperative Library System, which includes members of every library type. Both are charter members of CALIFA, a service bureau providing discounts and access to shared resource.

FISCAL IMPACT: Cost savings result from sharing resources.

AMT:GLEGPROG.RES
11/27/06



SANTA CRUZ • PUBLIC
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**2007 FEDERAL LEGISLATIVE
SUPPORT REQUEST**

**CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612**

TITLE: LIBRARY SERVICES AND TECHNOLOGY ACT FUNDING

PROPOSAL: The Library Joint Powers Authority Board advocates funding for the Library Services and Technology Act (LSTA) of at least \$300 million.

DISCUSSION/ANALYSIS: The Library Services and Technology Act is the federal program that provides (through the State) grants to local libraries for Information access through technology, and information empowerment through special services. Both the Santa Cruz and Watsonville libraries have used LSTA funds to experiment with various innovative projects. For example, the Library System's community information database was first created with grant funding. Our young adult services at the Garfield Park Branch were strengthened with LSTA funds. We have also used the LSTA program to provide graduate education tuition grants to six library employees and to purchase Spanish-language materials for the Bookmobile and other branches. Congressional appropriations for LSTA (which is located in the federal Institute of Museum and Library Services) have been flat for the last five years (roughly \$210 million), providing only \$16 million to California. Given local and state library needs, substantially more federal library support is needed.

FISCAL IMPACT: Grants subsidize special projects outside the regular budget.

AMT:GLEGPROG.LSTA
11/27/06



SANTA CRUZ • PUBLIC
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2007 FEDERAL LEGISLATIVE SUPPORT REQUEST

CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612

TITLE: CONFIDENTIALITY OF LIBRARY PATRON RECORDS

PROPOSAL: The Library Joint Powers Authority Board opposes any legislation that jeopardizes the confidentiality of library patron information, including certain provisions of the USA PATRIOT Act.

DISCUSSION/ANALYSIS: In 2003 the Library Joint Powers Authority Board adopted a resolution opposing the USA PATRIOT Act because it opposes any use of governmental power to suppress the free and open exchange of knowledge and information or to intimidate individuals exercising free inquiry. It believes that certain sections of the Act violate fundamental rights and liberties guaranteed by the United States Constitution, including the confidentiality of library patron information. At a minimum the act should be amended to exempt libraries from these "search and seizure" provisions, as well as other monitoring attempts such as direct access to library automation systems.

FISCAL IMPACT: None.

AMT:GLEGPROG.USA
11/27/06



SANTA CRUZ • PUBLIC
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**2007 STATE & FEDERAL
LEGISLATIVE SUPPORT REQUEST**

**CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612**

TITLE: TELECOMMUNICATIONS: DISCOUNTED RATES FOR LIBRARIES

SUMMARY: The Library Joint Powers Authority Board supports programs at both the State and Federal levels that guarantee for libraries the largest possible discount in rates for telecommunications services, internal connections, and access to the Internet.

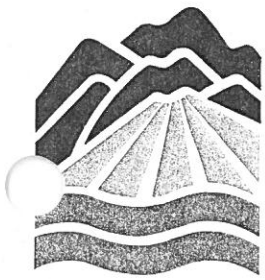
PRESENT LAW: The California Teleconnect Fund, administered by the California Public Utilities Commission (CPUC), provides a discount in telecommunications services for all libraries and schools statewide. The federal Telecommunications Act of 1996 also provides for "discounted rates for schools and libraries" under the administration of the Federal Communications Commission (FCC).

DISCUSSION/ANALYSIS: Both the City-County Library System and the Watsonville Public Library need to provide equitable access to information on the Internet and other electronic resources. The public now expects and demands current and extensive information, far beyond what is available in print form. Providing this access requires significant and rapidly escalating telecommunications expenditures.

In FY 2006-07 both the Santa Cruz and Watsonville public libraries expect to receive state and federal discounts, enabling them to use the best communications technology to support their information services.

FISCAL IMPACT: The state program provides a 50% discount for libraries and schools. The FCC E-rate national program continues to be adjusted and it is virtually impossible to predict the full fiscal impact.

AMT:GLEGPROG.TELE 11/27/06



SANTA CRUZ • PUBLIC
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2007 STATE & FEDERAL LEGISLATIVE SUPPORT REQUEST

CONTACT: ANNE M. TURNER, DIRECTOR OF LIBRARIES
831-420-5612

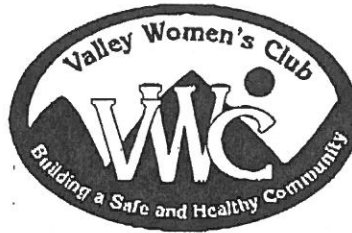
TITLE: OPEN ACCESS TO INFORMATION IN ANY FORMAT

PROPOSAL: The Library Joint Powers Authority Board opposes legislation that jeopardizes open access to information.

DISCUSSION/ANALYSIS: Legislative proposals to limit access to library resources, including the Internet, are a direct contradiction to the philosophic underpinnings of our free public library system. The usual mechanisms proposed are electronic filtering devices, in the hope of weeding out pornographic and other sex sites. Limiting access to books and magazines based on their subject content has also been proposed. The Santa Cruz City-County Library System Joint Powers Authority Board and the library staff are as concerned as anyone that children not be exposed to pornographic Internet sites or other material with age-inappropriate sexual content. The staff makes every effort to assist parents in teaching children how to use the library resources effectively, and it closely monitors adult compliance with rules for Internet use. However, the Board and staff believe that filtering in a library setting is an ineffective method of blocking pornography that also blocks access to needed information. Absent industry-wide standards, only individual choice is a suitable "filter."

FISCAL IMPACT: The Board's decision in 2001 not to comply with the federal Child Internet Protection Act, which mandates filtering in order to receive federal technology grants, has so far resulted in no funding losses.

AMT:GLEGPROG.OPE
11/27/06



November 27, 2006

Library Joint Powers Board

Dear Board Members:

The Valley Women's Club is dedicated to community action awareness and leadership in environmental, educational, social, and political concerns which affect the health and welfare of the San Lorenzo Valley. Following the recent Felton Library Friends presentation to our board, we endorsed their vision statement for a new branch. We urge you to include the Felton library project in the budget and work towards obtaining the necessary financing.

Considering the large geographical area served by this branch, a library comparable in size to other neighborhood branches should be located in the downtown business district of Felton if possible. This would make it easily accessible to both San Lorenzo Valley and Bonny Doon residents who come to Felton for errands and shopping. A community-based learning center in the gateway town of Felton would be a vital addition to the entire valley.

The Valley Women's Club strongly supports a new branch capable of serving the information needs of all San Lorenzo Valley students through high school, including a homework center for all ages. A branch with high school level reference materials and current technology would augment and complement the high school library. As you may know, the middle school and high school campus for all SLV public school students is less than one mile from downtown Felton; numerous charter and alternative school students would also use this resource.

We also support inclusion of a multi-purpose meeting room in the new Felton branch, having seen how the meeting room in the Boulder Creek branch has benefited that community. Such a gathering space would support a variety of enrichment activities: book and discussion groups, chess and film clubs, and special events. Although the Felton Community Hall does rent meeting space, this option is often not possible for community groups due to cost (\$30 an hour for incorporated non-profits and \$40-\$50 an hour for all other groups) and a million dollar liability insurance requirement.

The Valley Women's Club would gladly consider assisting with a community needs assessment or other community activities in preparation for the new Felton branch building.

Thank you all for your service to our County and cities on the Library Joint Powers Board.

Sincerely,

Beth Benjamin
President

**LIBRARY JOINT POWERS BOARD
SUSPENSE LIST
12/1/06**

	WHAT?	NEXT ACTION	DUE
	<u>Financial Planning Process</u>		
1	Review/Modify <i>Standards for Library Services/Facilities, and Facilities Master Plan</i>	COMPLETE	
2	Prepare 5 Year Projection of Library Baseline Expenses	COMPLETE	
3	Prepare 5 Year Projection of Library Revenues	COMPLETE	
4	Develop estimates for Capital and other Projects	COMPLETE	
5	Determine if Library structural changes are required	PENDING	Feb-06
6	Prioritize implementation of Capital projects	COMPLETE	
7	Consider/Choose Options for adding funding for Capital Projects	PENDING	
	<u>Library Automation System Upgrade</u>		
8	Staff report to JPB on project planning progress	Dec-06	
9	JPB adopts general project budget , appropriates Phase I funds	Jan-07	
10	Final recommendation re ILS vendor, JPB appropriates balance of funds	Mar-07	
11	Report to Board on Interlibrary Loan Access Issues	Jan-07	
12	Upgrade Library Website to include JPB minutes/agenda archives	COMPLETE	
	<u>Joint Powers Board Housekeeping</u>		
13	Annual election of officers	Feb-07	
14	Appoint Citizen Members	Jan -08, -09, -10	
15	Meet with Director of Libraries in closed session to discuss communications and other issues	May-07	
16	Conduct Director Appraisal	Oct/Nov -07	
17	Renew Joint Powers Agreement		5/1/2007

<u>Budgeting/Financial Management</u>			
18	Review Annual Audit		12/31/06
19	Review current budget status, consider budget revision proposals	Dec-06	
20	Discuss budget priorities for coming fiscal year, provide staff direction	Apr-07	6/30/2007
21	Consider draft budget, recommend changes	May-07	6/30/2007
22	Adopt final budget	Jun-07	6/30/2007
23	Review quarterly revenue reports	Nov, Feb, May, Aug	
24	Review quarterly expenditure reports	Dec -06, Feb, May , Aug	
<u>Personnel Issues</u>			
25	Hear report of Staff Classification Task Force. See also #16 above	Feb-07	
<u>Legislation/Advocacy</u>			
26	Adopt Annual Legislative Program	Dec-06	
27	Appoint Delegate to CLA Leg Day	Apr-07	
28	Renew library sales tax	Nov-12	4/1/2013
<u>2006 Staff Day Task Force Reports</u>			
29	Hold Study Session to Hear/Discuss Task Force Reports	Dec-06	
30	Approve recommendations for changes as required	Jan-07	
31	Receive report on Request No Pick-up Fine collection changes	Mar-07	
<u>Headquarters Move</u>			
32	Resolve HQ location problem: to move or not to move; see #7 above	Jul-07	
33	JPB Subcommittee (Rotkin/Poitinger/Stone) set criteria for site evaluation, review options inc. Locust/Union site	Jan-07	
<u>Felton Branch</u>			
34	Find/Fund suitable replacement site See # 7 above	no deadline	
35	Staff develop possible site list Community view/consider Laurel Street site	Jan-07	
36	JPB Subcommittee (Termini/Stone) discuss possible price with Laurel Street agents	no deadline	



SANTA CRUZ • PUBLIC
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A City County System

November 27, 2006

TO: LIBRARY JOINT POWERS AUTHORITY BOARD
FR: DIRECTOR OF LIBRARIES
RE: STAFF MORNING FOLLOW-UP

The Board will recall that last April the staff met for an all-morning discussion built around the theme, the Future of Libraries. Staff groups were asked to come up with ideas for improving public service.

The ideas developed ranged from simple changes easy to implement, to ones we've considered in the past, tried, and rejected, to those involving much broader issues. There was a lot of overlap and interdependence. For example, quite a few suggestions in several categories depend upon the upgrade of the automation system. And some of the ideas had or have already been implemented.

The Management Staff and the Staff Morning Committee agreed that the best way to evaluate and implement the suggestions made would be to assign most of the categories to lead people who would then recruit committees to work on the ideas. The Library Joint Powers Board would discuss the resulting reports at a Study Session.

Four of the committees (now called Working Groups) have reported, two more have been forgiven the November deadline, and one (Automation System upgrade) is not part of the Working Group process.

Attached are the four written reports. There will be two oral reports at the meeting, plus an update on the Automation System Upgrade earlier on the Agenda.

SJPBSTYSESS

Marketing/Promotion of the Library Committee -
List of Ideas and Suggestions

Statement of Purpose of Committee-

The Library needs an overall marketing strategy and vision for promotion within the community and beyond. We need to take an assessment of staff and Library resources and determine how we can fully utilize what we have.

Suggestions-

- Library blogs and email newsletters as ways to reach and communicate with the public through the Library's website, which is the Library that is open at all hours. Committee members have investigated the use of email newsletters in other library systems through out the country and are ready to offer suggestions for use for our Library.
- Community Networking: How we talk about the Library and about our work in clubs and community groups; offering bookmark bibliographies tailored for a group as an example of the Library being a resource for more information.
 - o Use the SCPL website and catalog as marketing tools to specific groups
 - o Create a Speakers Bureau from within the Library staff who could promote Library resources and demonstrate their use to specific groups within the community.
- Designate a Public Relations staff person who can focus on Library marketing, news releases, media relations, and work with staff who need assistance in communication with the community and create networking relationships to get our stories to the media. Create PR media kits with information that is required by various media.
- Friends of the Library: Cultivate an unknown and unlimited resource of connections to the community for promotional events and networking
 - o Sponsor large promotional events such as a Dinner in the Library, a Mystery night at the Library, Library sleepovers for kids, and etc.
 - o One-to-one promotional/fundraising efforts geared to different groups on specific topics.
- Connect with literary and music events in the community: For example- Shakespeare Santa Cruz or the Cabrillo Music Festival—revive the links with them and other events. Latch on to the tail of an event that is already established with emphasis on the Library as a source for more information with book lists, listening music suggestions etc.

- Create a recognizable SCPL Mascot. Create a friendly mascot for the public to identify with the Library. The mascot could be used in many different situations or events to personalize and create an emotional connection with the Library. Items with the mascot image could be for sale in the Friends gift shop and at all branches in the form of T-shirts, hats, book bags, pencils, stationary, notebooks, coffee mugs etc.
- Link Library resources with a plan for marketing them. For example: NetLibrary, wireless hot spots, down loading of audio books with Overdrive and NetLibrary, Genealogy section, the C.I.D database, Outreach Services for children and seniors
- Staff can do informal coaching on resources. For example, the designated "expert" for each database could be asked to offer staff coaching sessions and classes for the public. This would improve the staff's ability to market these Library resources in the branches.
- Suggest that the creation of coffee carts and associated services available within the Library be controlled by the Library to render all of the profits available back to the Library.
- Also information was provided by Pat Lorenzo who attended an Infopeople's Word of Mouth Marketing for Libraries workshop, highlighting one-to-one promotion techniques, how to promote through the grapevine...
 - o Avoid use of jargon ("reference databases") Examples from *The Tipping Point* by Malcolm Gladwell, talking about "mavens", "ambassadors", "salespeople" and "connectors" and the book *Fabled Service* by Betsy Sanders.

Acknowledgement to Marylaine Block, presenter at the 2005 CLA convention, for Change on the Cheap mascot ideas.

Staff who participated in "brain storming" sessions: Jennifer Smith, Pat Lorenzo, Janis O'Driscoll, Emily Christopher, Catherine Carlassare, and co-chairs: Gale Farthing and Linda Gault

Linda Gault 11.09.06

Committee to Create a more Welcoming/User-Friendly Environment

Lead: Barbara Snider

Committee Members: Diane Cowen, Sue Graziano, Karen James, Eunice LeMay, Pat Lorenzo.

Our task was to consider each suggestion, conducting research or other investigations to determine whether each idea would work, how easy/difficult it would be to implement, what the costs would be in hassle, dollars, training, etc. We were then to develop an overall implementation plan if appropriate, then make a report to all staff no later than November, 2006.

We have classified suggestions by Recommended And Doable At No Or Little Cost; Recommended And Doable But Monies Will Need To Be Allocated; Do Not Recommend; Recommend Considering In Long Range Planning. Some of the suggestions had elements in more than one category and that has been noted. A summary of our findings precedes more lengthy discussions.

This committee has worked well together, brought enthusiasm and a strong belief in the value of a the "welcoming library." Other welcoming ideas may come up from time to time for which Management would like staff input. This committee welcomes the opportunity to address further suggestions and serve as needed.

Summary:

Recommended And Doable At Little Or No Cost:

Self service on Summer Reading Program – this is being done now.

More casual staffing – friendly greeter.

Uniform identifying staff (badges).

Greeter/Information Kiosk.

Uncovered drinks.

Embrace Public's suggestions.

Priority on personal service.

Be helpful, Flexibility (staff flexibility in following rules) and

Flexibility, use common sense – three suggestions combined.

Recommended And Doable But Monies Will Need To Be Allocated:

Self check machine in YP.

Greeter/Information Kiosk.

Library drive-up book drops.

Do Not Recommend:

ATM machine in lobby at Central.

Have an Electronic Resource Room.

Use non-librarian staff to trouble shoot computer problems or put computers all in one room with a staff person to monitor – status quo preferred.

Recommend Considering In Long Range Planning:

Coffee in front part of the Lobby.

Discussion of Suggestions:

Recommended And Doable At Little Or No Cost:

1. **Self service on Summer Reading Program – this is being done now.**
2. **More casual staffing – friendly greeter. This suggestion goes to roaming staff also, which is now being implemented, and for which there is a policy. Not only are ref. staff roaming, so are circ staff. Circ staff roaming policy is in place and they are encouraged to leave the circ desk and help patrons when there is no line. All staff have a public service roll. Everyone should be merchandising and greeting (the circulation staff does a lot of merchandising – keeping new book area stocked. Every customer is OURS not yours or mine. No job is “beneath” any staff member. Everyone has input on how we should “tweak.”**
3. **Uniform identifying staff (badges). The committee liked the “Reference Staff” Badges Central is using to identify staff. Donna has printed a “Library Staff” badge that also goes on a lanyard and Merritt has ordered lanyards for the entire system and we have ordered lanyards for Central. Central started roaming in July and keeping statistics that we hope will reflect how useful it is and other branches that want to do this can.**
4. **Greeter/Information Kiosk. The committee agreed an information kiosk like the type you see at a shopping mall would be very useful. The least expensive be a large floor map of the library with a “you are here” designation – easy to blow up to any needed size a floor plan map at Kinko’s and laminate for about \$20.00. (See also #9)**
5. **Uncovered drinks are an issue since most people carry drinks every where, but if they’re covered, they are less apt to damage surfaces and equipment. If drinks cannot be avoided, Committee recommends covered drinks be allowed in the library. Staff has little inclination to police drink carriers, leaving enforcement very uneven. NAS is absolutely opposed to liquids at terminals, and signage and stronger enforcement of no drinks on computer tables may be needed to prevent more damage to computer equipment if covered drinks are officially allowed.**
6. **Embrace Public’s suggestions: adults can be demanding [the discussion was about staff resistance to/fear of public’s requests and suggestions for changes]. This suggestion brought up a discussion of word processing, which management and staff has been slow to adopt. Behind that issue is the question how do we handle suggestions from the public? Is there enough staff discussion about suggestions? Does staff know what users are suggesting?**

The committee further recommends appropriate user suggestions be folded into a reporting system that involves more staff discussion and more openness to possibilities. Possibly a committee, similar to safety committee,

that is represented by all areas of the library, that reviews suggestions and reports regularly to Management.

7. **Priority on personal service:** Public libraries provide more personal service than many other types of businesses. At the same time, we need to recognize when we are on “policy overdrive” and allow staff flexibility to meet patron needs and a method to modify or tweak what we’re doing. An annual or biannual all staff meeting where we can discuss service issues is an excellent method to identify cumbersome policies and other service issues if they can’t be settled otherwise. Also recommend article in 7/06 Library Journal, “Serving the Niche” page 38.
8. **Three suggestions with a common thread: Flexibility (staff flexibility in following rules): Be Helpful:** Flexibility, use common sense. Staff flexibility takes a lot of judgment. What one person says, another may not, leading to miscommunication and bad PR. Most important is for everyone to be on the same page, and use common sense when it will help the patron – the bottom line: help the patron without causing the patron embarrassment at a later date if they should ask for that same service from another staff.

Recommended And Doable But Monies Will Need To Be Allocated:

9. **Self check machine in YP:** This suggestion relates specifically to Central’s YP area. In other branches in the Santa Cruz Public Libraries system there is not the physical separation of YP and Adult areas as at Central. Initial discussions on this several months ago revealed some hesitation because patrons may have to go downstairs to the Circ. Dept. to pay fines, check out CDs, etc..

After discussion we decided that patrons would be going to the Circ Dept for fines anyway and media was not a factor (YP has a handful of CDs only), and there were more positive aspects to having a self check in YP than not, as children teaching adults to use the machine and there is more overall use of self checks.

Committee agrees with this recommendation. Cost at Central – capital cost of \$2,000 for additional self check equipment (according to Dan – this is the cost for each unit) plus man hours to build it (not yet determined) plus furniture to hold it (not yet determined). Ongoing cost of additional staff time – possibly page time – to assist patrons with the machine when there is only one person assigned to the YS area (Sundays and evenings). This additional staffing may not be needed permanently, possibly just initially until we can determine how much assistance to use this machine is actually needed. Initial trials by staff indicate the machine seems easier to operate than current model.

10. Greeter/Information Kiosk: An interactive kiosk would be about \$1,400 and is a one-time expenditure that would be available all day, not just during busy hours, that wouldn't require health insurance benefits, workers compensation insurance, vacation time, or training by other staff, etc. These factors make it less expensive in the long run (paying someone to act as a greeter for 3 hours per weekday will cost far more in the long run than buying a good-quality kiosk or electric map).

From their experiences at malls, museums, stadiums, etc., our patrons are very likely to be familiar with information kiosks. These institutions have embraced kiosks because they are helpful and cost effective since extra staff has become a luxury everywhere. It would be much simpler and less costly in the long term to invest in kiosk / touch screen technology for all branches as soon as it is feasible instead of trying to patch together inconsistent welcoming staffs throughout the system. Invariably, this would be staff taken from other duties that would not always be available, leading to misunderstandings with the public. Patrons would feel less intimidated if they were able to find out how to use the library by using a touch screen when they first walk in the door.

Since we do not always have enough Spanish speakers to cover all open hours, a kiosk with a "Press here for Spanish" option would be invaluable. We may even want to consider more than one foreign language since visitors come from all over the world.

Kiosks can be programmed any way we want, they can answer patron questions on multiple subject trajectories that could even extend into ready reference. A kiosk could address a lot of the issues about information vs. reference and how the job duties of reference, information, and circulation get divided in the future.

If library management decides not to purchase a kiosk because of space or technical issues and use staff time instead, the committee recommends a non-volunteer greeter be used between 3pm and 6pm Monday through Fridays, when lines to the Circulation desk build up. At other times the Circulation Desk handles informational queries. Staff greeters are preferable to volunteer greeters because staff has taken the extensive training needed to handle seemingly trivial but often complex queries. The committee felt pages would be especially good in this role. (see #4)

Another part of this discussion was the recommendation of a change machine in the lobby that gave patrons quarters for parking. Library users needing parking change often do not want to get in line although they need to wait their turn with other patrons. Change machines are available for between \$400 - \$4,000 depending on coin storage and options the machine offers.

11. Instead of book drops at schools, museums, bank ATMs, etc., library drive-up book drops are recommended. The committee recommends initially placing one each at Central and Tier 2 libraries since those libraries are open more hours, meaning the drops can be more frequently emptied, with the realization that branch traffic configurations will make placement easier at some than others. The costs range from \$1,800 to \$4,000. Staff cost to retrieve books would be folded into regular tasks, extra staffing not needed. (see #11 & #12)

Do Not Recommend

12. Book drops at schools, museums, bank ATMs, etc. The cost of having book drops at a variety of points that are not at libraries around town is prohibitive at this time. (See #10 for alternative recommendation)
13. ATM machine in lobby at Central – too time consuming and trouble to operate, there is an ATM machine less than a block from the library.
14. Have an Electronic Resource Room (one hour limit like in Eugene, Oregon) with staff dedicated to this task. Assumption: Neither smaller branches nor Central have the space for this type of room. This suggestion would require a lot of reorganizing at branches, expanding staff duties and additional training of technical liaisons. Also, this assumes there are problems with computers that are so major we would like to put them in one room and have some other else deal with them. The better solution is to look for ways for patrons to more easily use library resources.

If we had such a high volume of computer problems that other work was interrupted to the point it could not be done, and these computer problems could be resolved by staff intervention only, staff needs to be assured that accommodation would be made to meet those problems. As libraries become more dependent on electronic resources, library management and staff needs to be flexible enough to recognize how we do business is changing and work to meet patron needs.

15. Use dedicated staff to trouble shoot computer problems or put computers all in one room with a dedicated staff person to monitor. [refers to public internet use as well as word processing for public]. Scotts Valley has one person dedicated to their Homework Center during their busiest two hours daily. That person has other duties also. At one time one person in each branch was designated the “computer specialist.”

Because no one person can be at a library all the time and there are always technical problems needing immediate resolution, we all are trained on equipment – admittedly some do better than others but all staff help each other. Also, we try to simplify computer interfaces, printer commands, etc.

so they are easier for the public to operate since we don't have extra staffing. If staff cannot solve a problem with computers, NAS staff can be reached by phone or IRM. Having staff from another area come for a very simple problem is inefficient.

Committee suggestion: The committee recommends staff identify large or small problems with computers, photocopiers, and any other equipment, that make our users' lives difficult and sometimes our own, and notify a supervisor or write an IRM. Staff often sees a situation that needs resolution – and the solution can be found! The resolution may be as simple as better signage, better staff training or something complex, as more communication with the vendor, or needing NAS attention. Also, every 6 months do a small survey on the type and frequency of problems with equipment, including self-check, photocopier, checkpoint security, public Internet computers, PACs – this should include a patron survey. We expect our patrons to operate this equipment, but often we do not know the extent of the problems they are having.

16. Increase the number of check out points. Committee assumes this means to give patrons the ability to check out materials other places in the building. Media check out is a problem because staff assistance is required at this time. Also, there could be problems with patrons checking out items before they are ready to leave the building, then setting the items down and forgetting them, changing their mind and not realizing they need to check them in, other patrons inadvertently picking up what another has already checked out, etc. Cash registers and check out desks are usually the last stop for the customer before leaving the building for a reason.

Recommendation: this is an interesting idea but possibly not as practical as it sounds.

Recommend Considering in Long Range Planning:

17. Coffee in front part of the Lobby; Food allowed in Library: Enforcing no food or drink in the library has been tough. No one reads the signs or seems to care, or even understand what is appropriate in a public space. At the same time having food in the library brings a lot of problems. Pat related some important points from other places that have tried it. Smells of offensive foods, vermin, greasy prints on furniture and library materials, stains that come with food. Sometimes when people eat in the library they leave the tables greasy and the next person doesn't notice it, puts their papers, etc. in it. Allowing certain types of food only is problematic because enforcement will be difficult, patrons argumentative.

In the long term, committee recommends a separate area where food and drink would be allowed and maybe coffee, drinks, and food sold to raise

money (we would need more space than we have now – or it could be outside, then doable during good weather only – although there are outdoor vendors on Pacific Ave. year round).

Information/Reference Services to the Public:
Topics Addressed by Follow-up Committee
Merritt Taylor, Donna Swedberg, Emily Christopher, Jan Pearson
October 27, 2006 Summary

Introduction

The committee met several times over a six-month period to investigate and evaluate the suggestions proposed by library staff at Staff Day, April 7, 2006. The discussions were at times lively and at other times thoughtful, but each session was productive and the committee members were very cooperative with each other. The overall analysis is that many of the suggestions were weighted toward changes at the Central Branch more than at all branches system wide.

So many of the suggestions proposed in this report are specific to Central and not necessarily a suggestion that would work system wide. We have tried to format this report with that fact in mind. At times we have divided up the answers into separate categories so that there would be a recommendation for Central and a separate recommendation for other staff. In other situations we addressed the system as a whole.

As we investigated the suggestions made on Staff Day, it became apparent that one or more branches have already implemented some of the suggestions. Often, staff at one branch has come up with a solution to problems that are shared by staff at other branches. An example of this is the use of buzzers at Branciforte and Scotts Valley. Buzzers were installed to notify staff in the back when additional desk help is needed out front. This could be a solution for other branches that need to allocate their staff in creative ways to keep desks covered during unpredictable fluctuations in workloads. If there were a vehicle for increasing communication between branches, then solutions to common problems could be promoted.

In this report, we attempted to batch the suggestions together, which addressed the same topic. The suggestions are numbered, bolded and in italics. The responses follow.

1. Schedule people to rove throughout a shift

2. Roving Reference staff

Central adult reference: In July, branch manager, Barbara Snider, formalized the concept of roving librarians. During each shift at Adult Reference, both staff people are asked to rove for at least 30% of their shift. "The idea for roaming is to get all library staff involved and on the public floor when possible regardless of where they work in the library. Everyone should be merchandising and greeting and helping to keep the building in order... During the time you are on the public desk, you are invested in the public area of the library and aware of what is going on around you - not waiting for a patron to approach your service desk." At this time, there are no specific assignments as to who and when the roving is done, but it is considered part of good reference practice to be out on the floor offering assistance to those who need it. The Committee recommends that the roving schedule be keep voluntary rather than assigning staff to particular time periods. This is the current practice and appears to be working fairly well. Scheduling one person to roam during an assigned time period would require greater supervision.

Central Youth Services: Reference staff already roves throughout the department on their desk shift. This practice is also in place in the tier one and two branches. Whenever circulation and reference staff have a free and able moment, they leave the service desks and are out on the floor usually refilling displays, cleaning up books left on tables, straightening chairs and making themselves available to assist library customers out on the floor.

Central Circulation Services: Frequently this is more difficult for circulation staff because if they are not assisting the public at the desk, they use the quieter moments to discharge books, complete patron registrations, and generally catch-up on circulation deskwork.

Branch Reference staff - Tier II Branch Reference librarians do get up periodically and rove through the stacks during their desk shifts. They quite often are able and willing to accompany a patron to help them locate library materials and in the process are accessible to other patrons seeking assistance. It is not necessary to schedule 'roving' at specific intervals because the feasibility of time away from the Reference desk is dependant on how busy the branch is at any given time. As there is only one Reference person scheduled at a time, this should be kept to brief forays around the building. The Tier I Branches are not exactly comparable due to differences in size of facility and collection, however in general; the desk staff is multi-tasking and is covering Circulation and Reference tasks simultaneously.

Branch Circulation staff - Branch Circulation staff are encouraged to stay at the circulation desk during desk shifts, as it leaves the other staff person scheduled on the desk alone to manage phones, discharging, route-ins, checking out patrons and handling patron fines and other problems. During off desk time, they may help patrons if they are on the floor doing search lists, etc. They would not be scheduled to rove for the explicit purpose of helping patrons with reference needs because most branches require these staff members to complete other "off desk" tasks at these times.

COMBINING FUNCTIONALITY OF SERVICE DESKS:

3. More than one reference location

4. At Central, have a small desk/kiosk near front to help with easy questions, such as little requests. Send in-depth questions to Reference Desk.

10. Cross-training: Reference to Circulation

11. Reference person on circ desk. Why not? Why can't circ staff leave the desk to help a borrower?

12. Reference Librarian at the Circ Desk

13. Combine functionality of Circ and Ref

The trend in library service is toward consolidated desks, which the committee recommends be instituted wherever possible. Otherwise, desks should be located as closely as possible to each other for easy exchange of information and patron referral. For Central, we recommend that the Adult Reference and Circulation Desks be located in the same proximity. Future planning could also include providing multiple multi-service desks at Central (e.g., adult ref/circ, YS ref/circ, YS ref/adult ref/circ) including 2 or more patron exit/entrances.

The issue of a kiosk is discussed in the report from the Committee to Create a More Welcoming/User-Friendly Environment.

Attached at the end of this report, this committee has produced a document delineating the information/procedures that they felt were important for Reference Staff to know about Circulation Service, and vice versa, when desks are not consolidated. It has been sent to several other staff outside of the committee for review and input, in preparation for review/input from a wider group, if not the entire staff.

The quality of service to the public will be greatly enhanced if there is a degree of 'cross-training' between the Reference and Circulation staffs. Trained staff that understands the procedures of both Reference and Circulation should decrease the frequency of sending patrons from one desk to

the other. In addition to the improvement to public service, the cross training allows the staff to support one another and work as a more unified team. A lack of understanding and ignorance about processes and policies can lead to staff giving misinformation to the public, which is certainly counterproductive to our mission and goals.

There are several issues to balance when instituting departmental cross training. To help keep staff morale positive, it is critical to provide opportunities for promotion by offering advanced training. However, some staff may view these "opportunities" as a strategy instituted by management to force staff to work out of class. Additionally, questions arise as to whether all staff wants to have advanced training and whether it should be required. Given that not all staff has the same interests or career goals, it is recommended that advanced training be offered, but not required.

5. Offer word processing for adults

6. Investigate "Writely," a new web-based word processing product

Word processing is currently available for adults at Scotts Valley and Boulder Creek branches during certain periods of the day. Word processing is a function that patrons at other branches want available on library computers. Since there is no timeline for implementing word processing system-wide for the public on library computers, it appears that an online word processing program may be a practical alternative. Some of the questions that need to be answered before offering word processing on public computers are whether it should be on isolated computers or included on the timed computers. If on isolated computers, do we need some way to sign up and to limit time? If on timed computers, do we need some way to open a file or save a file to disk?

Online word processors such as Google Docs and Spreadsheets, (<http://docs.google.com/>) appears to provide a viable alternative. This online word processor is owned by Google and features the ability to begin, edit and save documents to your free account. You can email documents directly into your account so you can edit them from any computer; allow selected others to see and edit the document; and to print it.

The problem with using an online word processor on our current Internet computers would be when someone has a disk with a document they need to open or if they need to save their document to a disk when they are done. Microsoft Word is the most commonly used word processing program and if patrons have an existing document in Word that needs editing, they cannot do this on library computers using Google Docs and Spreadsheets. Despite the limitations, Google Docs and Spreadsheets seem to be easy to use and it appears to have most of the functionality of Word. Of course, you have to create an account to use it, but it is free.

While Google Docs and Spreadsheets seems like a good solution to some word-processing needs, it clearly does not address all the needs of our library users. The Committee recommends that there be ongoing discussions about other ways to offer greater levels of word processing on library terminals. As both hardware and software continue to evolve, the library should be open to considering changes in the future that would better address our users needs.

7. All terminals must be multi-usage (more Internet terminals).

The committee felt this statement was probably driven by the perception by the public that there are not enough adult Internet terminals especially at Central. A survey taken by NAS shows that all branches have more Internet terminals than PACS.

While some of these Internet terminals are restricted to Young People, in all branches there are more terminals dedicated to Internet usage than PAC's and Adult Internet terminals are equal to or greater than PAC's in all branches except Central and Live Oak. The size of these two branch buildings necessitates that PACS be spread over more square footage and Internet access can be restricted to only one area of the building. Given the inherent problems of networked Internet access computers, this committee understands that network integrity could be compromised if PACS were made multi-usage. Also at a given time, there may not be any PAC's available for the public to access the book collection if all PAC's were converted to multi-usage. This committee does not recommend that all terminals be multi-usage but that the need for more Internet terminals is monitored with the thought of adding more terminals whenever and wherever feasible.

8. More subs/more allocations (floaters)

While the request for more on-call staff and hours appears to be a matter for the Staffing Committee only, the issue of whether our current system ultimately provides the best service to our patrons falls under the concern of the Reference Committee.

We recommend that full- and part-time On-Call Librarian and Clerk ("floater") positions be created for the Library System. Each of these regular, permanent positions would have not only a guaranteed number of hours per week and benefits, but also off-desk assignments for those weeks when the total number of hours could not be met by subbing. Some shifts would clearly need to be filled by on-calls as is presently done.

Advantages that offset the expense, among them (in no particular order):

- More stable staffing at all desks
- Less on-call staff turnover (and therefore less training time and money) when hours and benefits are guaranteed
- Extra help could regularly be scheduled after the holidays, as requested by Central Circulation and Branch staff
- Less Subfinder time needed to fill shifts, especially when regular staff submit requests well in advance

The primary, immeasurable benefits are twofold:

- Better service at all desks, especially due to retaining a well-informed, consistent staff
- Increase in staff morale - staff really likes to know that they are providing the best service possible.

9. CORE Reference training - using a webcast

CORE (California Opportunities for Reference Excellence) is no longer available. This was a State Library supported project, which has not been funded for many years, and unfortunately the training materials are about 20 years out of date. Infopeople, another State Library supported project does offer classes in basic internet reference and in subject specific reference training but there is no overall, basic reference training course outside of academic programming. However it is apparent that there is a strong need within this library system to offer basic reference training to employees who find themselves unprepared to answer the occasional reference question. Janis and Merritt are developing a training course that will include a unit on the "Reference

Interview," based on Infopeople workshop materials. They also plan to develop a unit on basic reference sources and strategies and are currently investigating what other materials are available. At this moment using the materials prepared by various community colleges may provide the foundation for this unit. Cabrillo's Library 10 course teaches students basic research strategies using a variety of print and online sources. Minneapolis Community & Technical College has a program for library paraprofessionals, as does Cuesta College, and both have a course teaching basic research and information literacy. It is hoped that by next spring, Janis and Merritt will be able to start offering this training to staff. It will be necessary to clearly delineate the scope of "reference" service provided by professional reference librarians and what paraprofessional staff might contribute.

A final comment is that staff is always encouraged to seek out ways of self-training. There is a policy in place that full-time staff are allowed one-hour a week (part-timer staff are allowed 30 minutes) to use for self-training. Staff interested in improving their reference skills can always use this time to familiarize themselves with reference databases and materials in their branch collections.

14. Adult Reference staff at Central help with sends list.

The committee is unclear of the intent of this statement. As a result, we looked at it from both sides. The benefit to Circulation for Reference staff to help with the 'sends list' would be that there would be additional people to help pull books for the 'sends list'. The benefit to Reference staff to help Circulation with the 'sends list' would be to get a more clear idea of circulation procedures and the movement of books through the system and also to physically get into sections of the collection where they may not normally spend time perusing the shelves.

Upon further investigation, it appears that Circulation has the 'sends list' under control. It is quite lengthy and is printed out each morning with a Circulation Aid taking four or five sheets out of the list to search and leaving the remainder for the pages to pull.

15. Install a doorbell between Circ and Ref Desks to avoid run-around for patron (be aware of each other's desk staffing needs).

16. Have Circulation call Ref to back them up.

17. Bell to signal for staff off desk to come and help at the desk.

The committee recommends that a decision be made on a location-by-location basis to resolve issues of communication between service points. This will apply to Central, Aptos, and Live Oak at this time.

Solutions that are currently in place are:

A. Central YS Ref staff uses a doorbell to ring for back up from the YS Office

B. Branches: The Scotts Valley Branch would not benefit from a bell to communicate between the Reference and Circulation desks because of their close proximity to one another. Scotts Valley has a bell at the Circulation desk, which is used to call off-desk staff for back-up at circulation. Because the staff workroom is visually remote, the bell works well. During Homework Center hours (3-5pm), there is essentially two reference desks at Scotts Valley and the circulation staff often send adult patrons to the Homework Center desk for help when the reference staff is too busy to assist.

Central Adult desks-

A doorbell does not seem to be a practical solution for the Central Adult Reference staff as their offices are spread out over four different rooms. Perhaps another solution, like Instant Messaging, might work. An alternate possibility is to configure the Zone Page feature on the phone system to only go to certain designated phones. This is a feature that is currently being explored by the city's phone expert.

Communication at Central circulation does not seem to be a problem because of the close proximity between the service desks and the back workroom.

The committee recommends that Instant Messaging (IM) between/among desks and branches be further investigated. Possible situations for which IM could be implemented include:

- A. Call for help-need more staff backup for the desk staff
- B. Warning of patron behavior or that patron has been asked to leave one ranch and is headed to another
- C. At Central-between the circulation desk and the two reference desks when referring a patron to another staff person or desk

Summary of the Committees' Recommendations

Recommendations to do now:

Staff rove around the building whenever feasible. The focus is to assist patrons on the floor however refilling displays, removing items from tables and tidying up are possible other tasks.

Promote the use of Google Docs and Spreadsheets as a word processing program.

Use the attached document on Reference/Circulation cross training as a guideline for increasing staff knowledge in each department.

While not required, reference staff is encouraged to offer their help with the 'sends list' as an opportunity to get out into the stacks and to examine portions of Centrals' collection.

Investigate IM as an additional means of communication between/among individual staff, branches and service desks. If implemented, staff training would be necessary. Work with NAS staff on this.

Recommendations to do in the future:

Combined service desks

Reference and circulation desks placed in close proximity

Offer other types of word processing programs

Consider hiring permanent staff that can be used at a variety of locations instead of on-calls subs

Implement formalized reference training for interested staff

Do not recommend:

All terminals must be multi-usage

***The public's perception of our competence is crucial to their confidence in us.**

Reference/Circulation Cross-Training

What Reference Staff should know about Circulation service:

1. Steps in charging and discharging an item
2. Two week circulation period, four additional renewals per item, 7-day grace period
3. 99 item limit, 3 items in a call number, 3 feature films for video and DVD, all volumes in a set count as one
4. Basic information about how to get a card: ID to verify identity, necessity of verifying mailing address, mail a card if mailing address can't be verified
5. Replacement cards: cost is \$2.00, verify all information is accurate
6. Fines: 25 cents per day, \$10.00 maximum per item. Card blocked at \$5.00
7. Why a card is blocked: exceeds fine limit, claims returns number too high, more than 50 overdue items
8. Why someone can't renew a book: fines too high, already renewed four times, request has been placed on the book by someone else
9. How to renew a book: don't need library card if renewing to same borrower
10. How to (re) assign a PIN
- 10a. How to change an email address on the borrower's record
- 10b. How to change a phone number if borrower receives telenotices
11. All steps within My Account
12. Confidentiality: using someone else's card, picking up requests for another person, what can and can't be revealed about activity and fines on another persons (especially family members) card
13. Print queue protocol
14. Self-check machines: how to use and how to troubleshoot patron problems
15. Item status- what does /Shelving, Route, defer/hold/ etc. mean
16. Sends list: ability to do this and why it needs to be completed before the building opens
17. Movement of items from discharge to shelves: carts, sorting shelves, sorted carts, etc.
18. When to refer the patron to the Circ staff

What Circulation Staff should know about Reference service:

1. WebII vs. DRA - what does the patron see? What extra information does DRA provide?
What extra info does WebII provide?
2. Database control number: what is it and how does reference use it?
3. How and when does Circ put in a request?
4. Explanation of 3-day holds and when does the date begin and end?
5. Requests over the phone: how and who should do this?
6. Paper requests (including periodicals): what needs to be filled in to be "complete", before the patron walks away.
7. Item status- what does /Shelving, Route, defer/hold/ etc. mean
8. Movement of items from discard to shelves: carts, sorting shelves, sorted carts,
9. Last transaction vs. status dates: what do they mean and why they are useful to reference staff?
10. TS - why is a book there? When will it leave? When can the patron have it (or not have it)?
11. WebII vs. DRA - what does the patron see? What staff can find in one and not the other?
Why this information is useful to reference staff.
12. How and when to change the priority of a request
13. When to refer patron to the Ref staff

STAFF DAY FOLLOW-UP PROGRAMMING/TRAINING FOR THE PUBLIC

Members:

Gail Mason
Heather Norquist
Laura Whaley
Janis O'Driscoll
Merritt Taylor

The committee meet monthly over a six-month period in order to discuss and evaluate the suggestions proposed at Staff Day in April, 2006. During initial discussions, it was suggested that without having the staff who actually proposed these suggestions as part of the committee, we can not be absolutely certain we fully understand the suggestions. Therefore we have addressed them to the best of our ability. Also during an initial discussion, we concluded that some of the suggestions have already been implemented in slightly different formats and that the expressed need was either already being met or could be met by improving existing library services. In other words, new services did not need to be created, but improved or better advertised to staff and the public. The wordings in italics are the staff suggestions and the committee's responses follow.

Classes for teachers about the library
Teachers don't have a clear idea of the 21st century library
Video about public library services

Educating teachers about the public library and its services is a very important and sometimes frustrating task. Youth Services staff has found that general information outreach is not useful in reaching teachers. It is difficult to get on the packed agendas of faculty meetings of most schools and distributing printed materials has had limited success as well. While a "scattershot" method has not worked well, we have found that individual contact does. We take full advantage of every class visit that comes to the public library, seeing the teachers as well as the students as patrons we want to reach. Our library instruction includes them both. But how do we reach the teachers who aren't motivated or able to bring classes to the Library?

Word of mouth is powerful. Teachers who are pleased with a class visit or the assistance received making reference requests during their own personal visits will talk about it in the faculty room and some of the other teachers at the school will decide to call the Library. Having a presence on the school campus also brings attention to the public library. We reached many teachers last school year when we went out to high schools to give out library cards and PIN numbers. Our entry to the schools and the students were the high school librarians. Many teachers who did not take advantage of the initial offer were quick to sign their classes up when they saw the databases and the advantages of having a PIN number.

We also go out into the community to make presentations at events such as the Headstart Teachers Fall Meeting and the Museum of Art and History's Teacher Resources Night. It would be wonderful if all the teachers immediately saw the advantages of being partners with the public library but what we have found is that we have to "sell the Library" one teacher at a time. Teachers share their successes and we have found that teachers and students who are happy with the support they have received from Library staff are our best advocates in the school community.

A suggestion was made that we make a video about our public library services. While this might be another way of getting into classrooms and faculty meetings, it also "freezes" library service at a particular moment. As library services improve and change, the video could become out of date. How specific can we be? How general can we be and still produce a useful video? This project might be worth considering if we agree at the outset to schedule and plan regular updates. In the next two years, we will see changes in our website and our computer operating system. Creating a video of our 21st century information services might be an excellent project to take on as those changes are implemented.

Computer classes for kids

From the moment computers became a ubiquitous part of our lives, there were jokes about young children teaching adults how to use them. There can be no denying that what is intuitive for a young person at a keyboard is not the same as what is intuitive for an adult at the same keyboard and there is much an adolescent can teach about manipulating software and hardware and applying computers to everyday tasks.

Young people can help us with the mechanics but we can help young people with the strategies—efficient ways of searching databases and the Internet to find information that is useful and trustworthy. The problem is that because students are so adept with games, gadgets, and general applications they don't believe that there is something more for them to learn. They "know about computers"—a computer class is not for them. At school, there are keyboarding classes that help them use the keyboard efficiently for word processing and email but there are precious few school librarians and teachers who are teaching the thinking work that could be done before fingers touch the keyboard.

Public library staff that handle class visits make search strategies and evaluation of information sources a priority. These are "teachable moments" because there is usually a report to be written or a project to be finished. Faced with a specific task, students are more open to learning more about how to search and what to look for. Library staff fielding individual reference questions has had the same experience. So offering a "class" to students may not be the best way of teaching search strategies to young people. Instead, we should continue to be approachable and alert to opportunities to work with

individual students and continue to refine the class visit experience as an opportunity to demonstrate strategies.

The suggestion that the public library create Train the Trainers sessions for parents and teachers that would be offered by an YP/Adult Services team is also an excellent idea. In this way, there would be more adults in the community ready to take advantage of teachable moments to talk about search strategies.

Build collaborations

Community collaborations are what keep the public library viable, useful, and in touch with changing information needs. In the Fall of 2006, the Santa Cruz Public Libraries is in working relationship with a multitude of organizations and businesses which include: the Early Childhood Education Department at Cabrillo College, the Downtown Merchants Association, New Horizon School for Homeless Children, the Museum of Art and History, Atlantis Fantasyworld, the Family Shelter, WIC, Walnut Avenue Women's Center, Beach Flats Community Center, public and private schools, the Santa Cruz Art League, and Adult Education. This is not an exhaustive list of our partners but it suggests the breadth of the list and that there is always room for more collaboration. Our community partners sharpen Library awareness of community information needs.

It occurred to the PROGRAMMING/TRAINING FOR THE PUBLIC Committee, particularly when discussing this topic, that there is not an opportunity for the entire library staff to know about all our work in the community. We think that a good way of keeping the staff up to date on this work—and the work of all the Library departments—would be to reinstitute a staff newsletter (printed or online) that helps us all keep up-to-date with our busy colleagues.

Art Displays

The PROGRAMMING/TRAINING FOR THE PUBLIC Committee, encourages all branches to offer art displays. Space is a challenge in all branches—some more than others. Each branch staff has to decide how much wall space and/or counter space can be given over to rotating displays—can the branch only handle two-dimensional art or can three-dimensional pieces also be displayed safely? Staff at Boulder Creek and Central YP are experienced with solving these issues. In those locations exhibits are usually mounted for at least one month. Some branches also have quarterly exhibits.

Security is a significant issue for the artists. The Santa Cruz Public Libraries do not carry insurance to cover art displayed at branches. The forms filled out by artists at Boulder Creek and Central Branch are similar and warns the artist that if a piece of art is damaged or stolen while on exhibit at the Library, it is a loss for the artist. The Library accepts no liability but if the artist has homeowner's or renter's insurance, the loss may be covered

It is very important that the artists understand this—art has been stolen from Library branches.

The Committee suggests that any branch considering adding art exhibits use the forms used by Boulder Creek and Central. They contain solid guidelines for exhibiting art in the library setting. The Committee also recommends that these forms be available on the staff intranet. Places to contact in order to find artists are: schools, art departments at UCSC and Cabrillo, Santa Cruz Art League, publications such as the Metro and Good Times, friends, family, library staff.

Library training within book discussion groups:

The PROGRAMMING/TRAINING FOR THE PUBLIC committee thinks this is a good idea that can be implemented. The toughest problem is how to contact book discussion groups. Chris Watson of the Sentinel has offered to mention our services in her weekly column on books as a way of getting the message out to book groups. She also offered to let the public know that we can keep a list of people interested in books groups and book groups interested in adding new people. Another idea suggested that gained full support of the PROGRAMMING/TRAINING FOR THE PUBLIC committee is to design a flyer to be placed into book discussion book bags explaining that library staff was available to demonstrate library databases during book group meetings. The Contact person would be Merritt Taylor, Adult and Reference Services Coordinator, but that other staff members, depending on interest, expertise, and scheduling would actually be doing the demonstrations and talks.

Have field trips for seniors and offer classes for seniors-

“Public libraries are uniquely placed to help mediate the great social transformation signaled by the growing population of healthy, active older Americans. Recent research documents the desire of the older Americans to remain engaged in the broader world, to continue their learning opportunities, and to find fulfillment in meaningful activity.” (From *Designs for Change: Libraries and Productive Aging*, Americans for Libraries Council and Institute of Museum and Library Services, 2005.)

Most of us are aware that the Baby Boom generation is now beginning to reach retirement age, creating a variety of new demands on our society. “Retirement age” today is vastly different from the past. While previously we thought of that portion of the life cycle as a “winding down” and the beginning of old age, that population today is proving to be active, stimulated and engaged. They are starting new careers, becoming engaged in their communities, and are enthusiastically dedicated to learning.

The library is positioned to respond to these changes in what it means to be an older person in our society. We already formally serve seniors who are unable to access the library due to infirmity and isolation. We do an exemplary job of reaching young people and the parents who bring them to the library. However, that population which makes up the still active grandparents is largely overlooked in the library service planning.

Cultivating a relationship with active older adults would be mutually beneficial. First, while this group may not currently need our homebound services, at some point in the future that need may arise and familiarity and an existing relationship with the library will facilitate their use of those services. Second, it is well known that this population has strong lobbying power. They have the wisdom and experience to back worthy causes, and the time in which to do it. The library would be wise to target this group in its service delivery.

There is a new Senior Programming committee organized which includes Pat Lorenzo, Gail Mason, Bobbi Wolner and Merritt Taylor. Pat Lorenzo and Bobbi Wolner, (who already provides services to seniors), will be taking the lead on establishing programs and events for seniors. This committee has decided that the library should not organize field trips for seniors. There are other organizations such as Parks and Recreation and the Senior Centers that are better able to organize field trips. The library should continue to grow a more comprehensive list of services and programs that include both active and sedentary seniors. Pat is currently organizing a lecture series that will be geared toward active seniors and will include topics such as travel, crafts, health issues, and more. Also discussed are ways for the library to offer programs and events in collaboration with the senior centers. One idea presented was to offer programs at the centers that also provide meals. Another idea is to bring book talks or create book discussion groups at the Senior Centers.

Offer large print reading books discussion groups:

Some of the book club kits contain at least one large print copy. But not all books are published in large print and those that are published go out of print very quickly. There would need to be dedicated money to begin purchasing enough copies in large print to create large print book discussion kits. If kits were established then a natural outcome would be to sponsor a book discussion group. The PROGRAMMING/TRAINING FOR THE PUBLIC committee suggests that the Friends be approached for funding the purchase of large print books for discussion kits.

Summary and Recommendations

As stated in the introduction, without having the staff that offered these suggestions on the committee, it is difficult to know whether we have fully addressed the concerns. While the library system is already implementing some of the suggested ideas, it is clear that communication from branch-to-branch and department-to-department is not always clear. Years ago, the library system had a staff newsletter, and this committee recommends that a communication tool be implemented. Whether it is the old fashioned newsletter delivered once a month with paychecks, or a more current electronic blog, the system would benefit if news of programs, services, and events were transmitted on a regular basis. The committee prefers the idea of a monthly newsletter that could be

distributed to staff and members of the Joint Powers Board because the consensus is that people are more inclined to read something if it is handed to them than if they have to go searching for it electronically.

A second recommendation is that the library system continues to build collaborations with other community partners. The Youth Services has done an especially good job of this in the past and will certainly continue to do it in the future. Adult Services should do more of this in the future. Two directions to start with are building collaborations with the existing Senior Centers and senior groups. The second direction is to reach out to the various community groups with offers of specialized training.

A third recommendation is to continue to expand services to seniors. As stated earlier, the Baby Boomers are moving into the senior age-range and this would be an especially good time for the library system to begin planning, collaborating, and implementing new programs and services to meet the needs of this group.

A fourth recommendation is that the library system approach the Friends group for the purchasing and development of large print book kits.