



SANTA CRUZ • PUBLIC
LIBRARIES
A City County System

LIBRARY JOINT POWERS AUTHORITY BOARD

Monday, September 10, 2007 at 7:30 PM
Community Meeting Room
224 Church Street, Santa Cruz

7:30 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA
3. APPROVE MINUTES OF July 2, 2007
4. ORAL COMMUNICATIONS
5. FRIENDS OF LIBRARY VOLUNTEER PRESENTATION
 - A. Adopt Resolution Honoring Library Volunteers
6. CONSENT AGENDA
 - A. Accept Early Learning with Families Grant
 - B. Accept Public Library Staff Education Program Grant
 - C. Approve Holiday Hours Schedule
7. WRITTEN COMMUNICATIONS
 - A. Unpublished Opinion Piece re Updating Library Collections by Anne M. Turner, Director of Libraries
 - B. Letter to Editor (all local papers) of August 29, 2007 re Governor's Budget Cuts to Library Programs

8. REPORTS OF ADVISORY BODIES

9. MEMBER REPORTS

10. STAFF REPORTS

- A. Annual Safety Committee Report
- B. Annual Statistical Report, 2006-07
- C. Quarterly Report on Measure B Receipts (Assistant County Administrative Officer)
- D. Other Reports

11. OTHER BUSINESS

- A. Discuss Draft Response to 2006-07 Grand Jury Report
- B. Discuss Timing for Sales Tax Renewal Vote

12. SCHEDULE NEXT MEETING

The next meeting is scheduled for Monday, October 1, 2007. The Board should meet in closed session to discuss her annual performance appraisal with the Director of Libraries. Polling results will also be available at this meeting, and a budget update and revision.

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.

**LIBRARY JOINT POWERS BOARD
SUSPENSE LIST**

9/4/07

	WHAT?	NEXT ACTION	DUE
	<u>Financial Planning Process</u>		
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	COMPLETE	
9	Adopt general project budget appropriate Phase 1 funds	COMPLETE	
10	Consider and make Phase 1.2 appro.	COMPLETE	
11	Final recommendation re ILS vendor, JPB makes funding source decision	Nov-07	
12	Report to Board on Interlibrary Loan Access Issues	COMPLETE	
13	Upgrade Library Website to include JPB minutes/agenda archives	COMPLETE	
14	Staff continues review/upgrade of Library Web Site; Rept to Board	Nov-07	
	<u>Joint Powers Board Housekeeping</u>		
15	Annual election of officers	Feb-07	
16	Appoint Citizen Members	Jan -08, -09, -10	
17	Meet with Director of Libraries in closed session to discuss communications and other issues	May-07	
18	Conduct Director Appraisal	Oct/Nov 07	
19	Renew Joint Powers Agreement	COMPLETE	
	<u>Budgeting/Financial Management</u>		
20	Review Annual Audit	Mar-07	
21	Review current budget status, consider budget revision proposals	Dec-07	
22	Discuss budget priorities for coming fiscal year, provide staff direction	Apr-07	
23	Consider draft budget, recommend changes	May, June 08	
24	Adopt final budget	Jul-07	
25	Review quarterly revenue reports	Nov, Feb, May, Aug	
26	Review quarterly expenditure reports	Nov, Feb, May, Aug	

	<u>Personnel Issues</u>		
27	Hear report of Staff Classification Task Force	COMPLETE	
28	Hear report on Staff Hiring Procedures	Jul-07	
29	Receive Annual Staff Safety Report	Sep-07	
	<u>Legislation/Advocacy</u>		
30	Adopt Annual Legislative Program	Dec-06	
31	Expand Public Information Program	FY 2007-08	
32	Renew library sales tax	Nov-12	4/1/2013
	<u>2006 Staff Day Task Force Reports</u>		
36	Receive report from Wayfinding Task Force	Nov-07	
	<u>Headquarters Move</u>		
37	Approve move to Locust/Union Street site	COMPLETE	
38	Approve HQ lease amendment	COMPLETE	
39	Hear periodic reports on move progress	Sep-07 through Mar-08	
	<u>Felton Branch</u>		
40	Hear report from Felton Task Force on community discussions/architectural plans for Verutti Site	Sep-07	
	<u>Aptos Parking Lot</u>		
41	Appropriate funds to secure plans and specs for project	COMPLETE	
42	Secure funds to complete project See #7 above		
	<u>Library Program Issues</u>		
43	Hear staff report on Read to Me/ Family Place grant projects	Nov-07	
	<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	
6	Prioritize implementation of Capital projects	COMPLETE	

SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD

MINUTES

July 2, 2007

Central Branch Community Meeting Room
224 Church Street, Santa Cruz

7:30 PM PUBLIC MEETING

I. ROLL CALL

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

Absent:

Excused: Supervisor Mark Stone

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

II. APPROVAL OF MEETING AGENDA OF JULY 2, 2007

Councilmember Rotkin moved, seconded by Supervisor Beautz

that the Board approve the agenda of July 2, 2007.

**UNAN
ABSENT: Stone**

III. APPROVE MINUTES OF JUNE 4, 2007

Citizenmember Gorson moved, seconded by Supervisor Beautz

that the Board approve the minutes of June 4, 2007

**UNAN
ABSENT: Stone
ABSTAIN: Rotkin**

IV. GUEST PRESENTATIONS

- A. Locust/Union Street Property: Peter Bagnall, Architect
 - a. Has seen existing Headquarters offices at Pacific Avenue
 - b. Does not have a timeline yet
 - c. The Building is dated and will need complete gutting except for the outside walls
 - d. Looking into possible "green" building options

- B. Library Hiring Procedures: City of Santa Cruz Human Resources Director, Lisa Sullivan and Library Assistant Director, Susan Elgin
 - a. Ms. Sullivan briefly explained HR's involvement in the hiring process, which are as follows:
 - i. HR is notified of a vacancy
 - ii. Start Recruitment
 - iii. Deliver list of candidates to Department
 - iv. Interviews are held in the Department and HR is notified of the results
 - b. Susan Elgin handed out a spreadsheet of recent hires made within the library over the past 14 months.
 - c. Dorcas Abbott, Sandi Imperio and Heidi Jaeger-Smith made public comments on their personal experiences with regards to the hiring practices that they have been involved with in the library system.
 - d. The Board requested that the Director give some thought to how to ameliorate the perception of unfairness among some staff. One idea would be to add an outsider to interviewing panels. The Director said she would respond in September.

V. ORAL COMMUNICATIONS

None

VI. CONSENT AGENDA

- A. Amend Headquarters Lease Agreement

Councilmember Mathews moved, seconded by Councilmember Rotkin

That the Library Joint Powers Authority Board adopt a resolution directing the Director of Libraries to execute an addendum to the lease for space at 1543 Pacific Avenue to extend the term for six months to April 30, 2008, and to establish a holdover rate should the library occupy the premises after the expiration date.

UNAN

ABSENT: Stone

- B. Accept First 5 Commission of Santa Cruz County Grants

Councilmember Mathews moved, seconded by Councilmember Rotkin

That by motion the Library Joint Powers Authority Board authorize the Director of Libraries to sign agreements with the First 5 Commission of Santa Cruz County for continuation in FY 2007-08 of the Read to Me and Family Place Grant Projects.

UNAN
ABSENT: Stone

VII. WRITTEN COMMUNICATIONS

None

VIII. REPORTS OF ADVISORY BODIES

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

- August 23, 2007 the Friends is sponsoring the Shakespeare Santa Cruz production of *Endgame* by Samuel Beckett
- Friends' night is part of the "community" night where Santa Cruz County residents get discounted seats.

IX. MEMBER REPORTS

None

X. STAFF REPORTS

The Director made the following reports:

- A. Library Capital Projects Revised List
- B. Bequests and Trust Fund Accounts: A Summary June 2007
- C. Other Reports
 - Kira Henifin, Clerk of the Board, has been accepted into the CSUMB Public Policy graduate program and will continue to do all the clerk duties except the clerical minute taking function of supporting the board.
 - The Director distributed copies of the Library section of the 2007 Grand Jury Report, and said she would draft a response for Board discussion at its September meeting.
 - Merritt Taylor, Adult Services Coordinator, reported on the Adult Summer Reading Program going on this summer.
 - i. Second Year of the summer reading program for adults
 - ii. Theme is "Get a Clue"; following along with the children's summer reading theme
 - iii. Guest Speakers:
 1. "A Night of Mysteries" - Come and talk about your favorite mysteries
 2. Stan Stevens - "Murder on Beach Hill"
 3. Nikki Silva - "Hidden Kitchens"

XI. OTHER BUSINESS

- A. Approve Resolutions Adopting FY 2007-08 Operating and Capital Equipment Budgets, and transferring the appropriating various trust fund revenues as follows:
Appropriating McCaskill Trust for Local History Funds
Appropriating McCaskill Trust for the Visually Impaired Funds
Appropriating Finkeldey Trust Funds
Appropriating Richardson Trust Funds

Councilmember Rotkin moved, seconded by Supervisor Beautz

That by motion the Board approve the Director's proposed changes in the Personnel Budget for FY 2007-08.

**UNAN
ABSENT: Stone**

Councilmember Rotkin moved, seconded by Supervisor Beautz

That by motion the Board direct that the FY 2007-08 budget include staff to implement the additional open hours proposed by the Director to open Felton and Boulder Creek on Mondays.

**AYES: Beautz, Gerdt, Poitinger, Rotkin, Termini
NAYES: Gorson, Johnson, Mathews
ABSENT: Stone**

Councilmember Rotkin moved, seconded by Citizenmember Gorson

That the Board approve the resolutions attached adopting FY 2007-08 Operating and Capital Equipment Budgets, and transferring and appropriating various trust fund revenues.

**UNAN
ABSENT: Stone**

XII. SCHEDULE NEXT MEETING

Councilmember Mathews moved, seconded by Councilmember Rotkin


That the Board cancel the August 6, 2007 meeting and resume the regularly scheduled meeting being held on September 10, 2007.

**UNAN
ABSENT: Stone**

XIII. ADJOURN

The regular meeting adjourned at 9:25 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 # 2007-12

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
 AUTHORITY BOARD HONORING AND THANKING
 LIBRARY VOLUNTEERS**

WHEREAS Friends of the Santa Cruz Public Libraries, both youngsters and adults, donated over 15,000 hours of volunteer effort to the Library System during FY 2006-07, and

WHEREAS the tasks they accomplished included visiting homebound people, mending books and other media, sorting materials for Friends book sales, serving hot dogs at the annual Festival of the Book, assisting as docents in the Genealogy Collection, licking stamps and stuffing envelopes, and performing a hundred other jobs that enable the Library System to serve its community, and

WHEREAS the Library System could not offer the range of programs and services it does without the support and help of volunteers,

NOW THEREFORE BE IT RESOLVED that the Library Joint Powers Authority Board salutes all the people who volunteered time to the Library during FY 2006-07, and thanks them most sincerely for their efforts.

PASSED AND ADOPTED this 10th day of September 2007, by the following vote:

AYES: Board Member:

NOES: Board Member:

ABSENT: Board Member:

DISQUALIFIED: Board Member:

ATTEST: _____
 Board Clerk

Library Joint Powers Board
Approved

Date: _____

Chair: _____

JVOLUNTEER.RES

August 8, 2007

TO: LIBRARY JOINT POWERS AUTHORITY BOARD
FR: DIRECTOR OF LIBRARIES
RE: ACCEPT EARLY LEARNING WITH FAMILIES GRANT

RECOMMENDATION: That the Library Joint Powers Authority Board adopt a resolution accepting a Library Services and Technology Act grant under the Early Learning with Families (ELF) program in the amount of \$22,286 for expansion of the Family Place program

BACKGROUND

In both FY 2006-07 and FY 2007-08 the First 5 Commission has funded our Family Place project. It is a three year program in which FY 2007-08 is Year 2. To summarize:

Family Place programs bring children and parents to a space within the library's children's area where they share time playing, reading, and interacting with community specialists knowledgeable in issues essential to family well-being. Parents who might not seek out formal assistance have the opportunity to talk informally with nurse practitioners, child care specialists, pediatricians, dentists, and other community professionals.

Unfortunately, First 5 funding is limited to certain County zip codes and only two of our Branches qualify for the program: Branciforte and Live Oak. But we are sure that all our Branches would benefit from the program. So staff requested ELF funding from the State, and was granted it.

Our Youth Services Coordinator, Janis O'Driscoll, has been on the State Advisory Committee on the Early Learning with Families program, and our Year 1 work here in Santa Cruz is highly respected.

State funds will be used for membership fees, to send four members of the Youth Services staff to mandatory Family Place training in New York, and for program materials.

GLSTAFF.JPB

RESOLUTION # 2007-13

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING FUNDS AND AMENDING THE
FY 2007-08 BUDGET TO ACCEPT A GRANT FOR EXPANSION
OF THE FAMILY PLACE PROGRAM**

WHEREAS: The California State Library has awarded the Santa Cruz Library System a LSTA grant in the amount of \$22,286 to expand the Family Place Program to other branch libraries,

NOW THEREFORE, BE IT RESOLVED that the Library Joint Powers Authority Board transfer funds and amend the FY 2007-08 budget in the amount of \$22,286 to accept the grant for Family Place project activities.

PASSED AND ADOPTED this 10th day of September 2007, by the following votes:

AYES: Board Member:

NOES: Board Member:

ABSENT: Board Member:

DISQUALIFIED: Board Member

Library Joint Powers Board

Approved

Date: _____

Chair: _____

ATTEST: _____
Board Clerk



SANTA CRUZ • PUBLIC
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August 8, 2007

TO: LIBRARY JOINT POWERS AUTHORITY BOARD
FR: DIRECTOR OF LIBRARIES
RE: ACCEPT PUBLIC LIBRARY STAFF EDUCATION GRANT

RECOMMENDATION: That the Library Joint Powers Authority Board adopt a resolution accepting a Library Services and Technology Act grant under the Public Library Staff Education program in the amount of \$10,760 for tuition reimbursement for three library employees.

BACKGROUND

The State Library has awarded the Library a grant to provide tuition reimbursement to three library employees who are pursuing graduate degrees in Library Science. Grants are awarded on a competitive basis. The following employees qualified for grant reimbursement:

Diane Cowen \$2,880
Library Assistant, Aptos Branch

Elizabeth Henry \$2,880
Library Clerk, Technical Services Division

Chela Lucas \$5,000
On-Call Library Clerk

Each employee received the grant amount requested.

GLSTATUITION.JPB

RESOLUTION # 2007-14

**RESOLUTION OF THE SANTA CRUZ LIBRARY JOINT POWERS
AUTHORITY BOARD TRANSFERRING FUNDS AND AMENDING THE
FY 2007-08 BUDGET TO ACCEPT A GRANT FOR TUITION
REIMBURSEMENT FOR CERTAIN EMPLOYEES**

WHEREAS: The California State Library has awarded the Santa Cruz Library System a LSTA grant in the amount of \$10,760 to provide tuition reimbursement for the following Library employees pursuing graduate study in library science:

Diane Cowen
Elizabeth Henry
Chela Lucas

NOW THEREFORE, BE IT RESOLVED that the Library Joint Powers Authority Board transfer funds and amend the FY 2007-08 budget in the amount of \$10,760 to accept the grant for tuition reimbursement.

PASSED AND ADOPTED this 10th day of September 2007, by the following votes:

AYES: Board Member:

NOES: Board Member:

ABSENT: Board Member:

DISQUALIFIED: Board Member

Library Joint Powers Board

Approved

Date: _____

Chair: _____

ATTEST: _____
Board Clerk



SANTA CRUZ • PUBLIC
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August 8, 2007

TO: LIBRARY JOINT POWERS AUTHORITY BOARD
FR: DIRECTOR OF LIBRARIES
RE: HOLIDAY HOURS SCHEDULE

RECOMMENDATION: That by motion the Board adopt the following schedule of open hours for the December 2007 holiday season:

12/23/07-12/25/07: All facilities closed (12/25 is a holiday)
12/31/07: Close at 3pm at all facilities
01/01/08: All facilities closed (01/01 is a holiday)

Employees may take leave without pay, vacation time, or may work if they wish.

BACKGROUND

The City of Santa Cruz will close and furlough most employees for the two weeks of the holiday season. The City is doing this for budget reasons. The Library System does not require this length of closing to meet its operating budget needs.

However, public use around the holidays is traditionally low, and there are heavy requests for staff time off that require using extra on-call hours to maintain service.

Staff recommends that the Central Branch be closed on the Sunday prior to Christmas, that all Branches be closed on Monday, Christmas Eve (which is a half holiday), and of course be closed on Tuesday, December 25th.

For the New Year's holiday, staff recommends that we close all facilities at 3pm on New Year's Eve, and be closed as usual on Tuesday, January 1st.

JHOLIDAY.HRS

NOTE:

The attached Opinion piece was written in response to an inaccurate and hostile Letter to the Editor that appeared in the Santa Cruz *Sentinel* on July 7, 2007. I wrote it so that the citizen would not retain public control of the information.

It was sent to the Sentinel on July 12th, after a phone consult with Editor Tom Honig, who agreed to run it. But it never appeared.

Finally, on July 20, 2007 Honig telephoned to say that first he had lost the piece, and then forgot about, but would run it over the weekend of the July 21-22,

I told him not to bother, since by then few people would remember the original letter. An Opinion piece would only serve to stir up a forgotten non-issue.

But I thought the Joint Powers Board might be interested in the explanation of what we are doing in the Storage Collection.

Anne M. Turner
Director of Libraries
August 8, 2007

UPDATING LIBRARY COLLECTIONS

By

Anne M. Turner
Director of Libraries

Question: Why is the Library purging 50,000 books from its collection?

Answer: It isn't.

A recent Sentinel letter-writer from Boulder Creek recently castigated the Santa Cruz Public Library management for ostensibly purging 50,000 items from its Storage Collection. I want to correct the factual errors contained in that complaint and explain what we are doing and why.

1. There are not 50,000 books in the Storage Collection. There are more like 15,000. The other 35,000 are back issues of magazines that patrons once checked out, and therefore have barcodes. The computer counts them as "Storage" items because they are kept with the back magazines and not on the open shelves.
2. We are examining every fiction book in Storage to see whether it has been checked out within the last two years. If it has, it is being sent to open shelves in a Branch collection, where it will be more accessible to the public. There are no discards via this action.
3. Fiction books that have *not* been checked out in the last two years are being evaluated as to why they're kept if nobody is reading them. Many of these will go to the public via the Friends of the Library book sales—among other reasons because every year we acquire hundreds of new fiction titles, and our shelving space is not endless. Moreover, our job as a mid-sized public library, is to maintain a collection that is current and use-

ful to our patrons. It is *not* our mission to keep an archive of books representing the great literatures of the world simply because they are interesting, written beautifully, or somebody might want them someday. That is the job of the major research and academic libraries.

4. We are also evaluating the non-fiction books in Storage, an easier task because non-fiction is based on dated factual material. A travel book from the 1930's, for example, may be fun to read, but we don't really need it if nobody is asking for it. Outdated medical, computer, and other books get evaluated with the same criteria. Again, our job is to maintain a collection that is current and useful to our patrons. And, as with fiction, many new non-fiction titles arrive every year, looking for shelf space.
5. Some non-fiction titles have been kept simply because they are old—not because they relate to Santa Cruz County history. For example, we had in Storage a book called *About Vanilla* published in 1900 by the Joseph Burnett Company of Southborough, Massachusetts, which made that flavoring. The Selection Librarian responsible for the cooking and food subject area emailed the Southborough Historical Society and asked if it was interested in the title. Absolutely, was the response, and we have shipped it off to them.
6. A significant number of book items in the Storage Collection are local reference documents such as environmental impact statements and other planning materials. Of course we are keeping these because they are frequently used by the reference staff and the public. People not only want to look at the reports on current projects, but to find out what a developer promised twenty years ago when an existing project was first proposed.

In summary, we aim for a collection that is balanced between classic and current titles. But because of shelf space shortages, we err on the side of more recent publications, knowing that we can usually borrow an older title from another bigger library somewhere.

Every library, whether big, small, or mid-sized, must constantly evaluate its collections in order to ensure that its resources are meeting public needs. And these needs change, especially as electronic databases become available and we are better able to move physical items around the System to wherever people want them. Right now, one of the Santa Cruz Public Libraries greatest needs is space—not only for books, but for computers used by the public, collections and programs for teenagers, and study space for younger kids.

Reviewing and bringing the storage collection up to date is helping us find some of that needed space.

Words: 692

WEEDING.OPED
07/12/07



SANTA CRUZ • PUBLIC
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A City County System

August 29, 2007

TO THE EDITOR

When the Governor signed the State Budget last Friday , he did serious damage to the Public Library Foundation (PLF) program. This is the only direct aid the State gives to libraries. The draft budget had a \$1 million augmentation for PLF, which the Governor blue-penciled. Worse, he went back to last year's \$7 million augmentation, and cut that as well. So we are moving backwards in time. Whereas the Santa Cruz Library System was expecting a PLF payment of at least \$118,436, we will instead get roughly \$75,000, the amount we received two years ago in FY 2005-06.

In another attack on libraries, the Governor cut \$7 million from the Direct Loan and Interlibrary Loan program. This provides per item compensation to libraries for "resource sharing" via loans to the patrons of other libraries. Given that the number of ILL requests we receive has been rising since we loaded the Santa Cruz Library catalog on the Statewide California Catalog, this cut may have a very deleterious effect. Most libraries are in the same position these days. People, including the Governor, say that sharing resources is a good idea, and that a statewide catalog is wonderful tool for everyone. But loaning items costs money and we need the State to help pay for the services it wants.

People love public libraries and the services they provide, but public libraries cannot live on love alone.

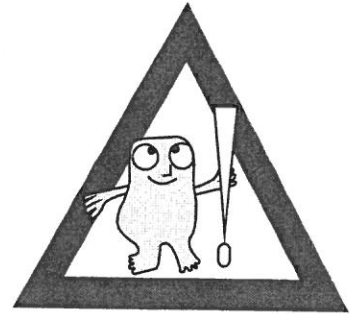
Anne M. Turner
Director of Libraries
Santa Cruz City-County Library System

SCPL Safety Committee

Sandi Imperio, Tier I branches, chair
Kira Henfin, Office Supervisor
Matt Kiernan, Building Maintenance & Drivers
Margaret Souza, Technical Services
Laura Whaley, Branch Managers
Paula Contreras, Tier II branches & Librarians
David Sidle, Circ Aides & Pages
Calvin Trimpey, Office Staff
Tinka Anderson, NAS
Diane Cowen, Clerks
Training Committee Representative Gail Mason

SandI's Phone: 831-420-6347
SandI's Fax: 831-420-6345

Email: safety@santacruzpl.org



Annual Report 2006-07

The Safety Committee moved to bimonthly meetings this year. The committee now meets the second Tuesday of odd months (January, March, May, etc.)

With the 3-year FIT* program ending, a sub-committee was formed to investigate future ergonomic and lifting training alternatives. The committee was made up of three Safety and two Training Committee members and was chaired by Safety member Calvin Trimpey. The committee has surveyed staff for comments on FIT and suggestions for future ergonomic programs. The committee's final report was submitted to management August 1, 2006. (see Appendix B)

Committee members previewed employee training videos offered by the State Library. Of the seven safety and/or ergonomics videos viewed, two were recommended for purchase. Titles purchased: Office Ergonomics, It's your move and Solving Difficult Situations.

The committee sent several recommendations to the library management: adoption of policy or procedures for disseminating information about problem patrons; revision or deletion of Alpha emergency notification.

Additions to the staff Intranet: updated Safety 101 quiz and New Employee Ergonomics Safety Checklists.

Equipment purchased: adjustable workstations for Aptos branch manager and Central YP; adjustable table for Central and Aptos Discharging stations; Safety text: Tools of the Trade; portable DVD players to be used for viewing training DVDs; monitor arms for shared workstations; keyboard trays.



Responded to following staff complaints/suggestions/incidents about unsafe or possibly hazardous conditions (not in order of occurrence):

Branch	Description	Solution
Garfield Park & Central	Problem Patron that tried to follow staff member home	Recommend emails go to all staff in case patron goes to another branch and continues the same behavior
Headquarters	Staff stuck in front elevator; emergency phone call dismissed as false alarm	New procedures are in place for staff using the elevator and responding staff at the Reception Desk
Aptos	Lighting contractors working in public areas without blocking work areas/allowing public to walk under ladders and fixtures.	Recommended all branch managers supervise work closely and use caution tape to cordon off work areas
Scotts Valley	Unable to unlock the public restroom door from outside	Locksmith has fixed problem
Central	Several lights out in building	Building Maintenance has changed bulbs and ballasts as needed
Boulder Creek	Loading zone has sunk	Recommend leveling area again.
La Selva Beach	Mildew found on wall behind shelving	Air quality was checked and passed inspection. Area will be dried out and repainted.
Aptos	Wire bookends	Recommend using free-standing tall bookends
Headquarters/ Systemwide	Crate shortage	More crates ordered by library and Friends
Central	Overflow of donations partially blocking path and only exit for NAS staff	Friends volunteers organized area and cleared path
Aptos	Reduce maximum desk shift length to 2 hours (currently 5)	See Appendix A documents
Anon	Increase maximum desk shift length to 8 hours	
Headquarters	Tripping and odor hazards caused by carpet cleaning during work hours	<ol style="list-style-type: none"> 1. Notify staff 1 week in advance 2. MSDS posted in front and back 3. Give staff options for alternative worksites
Headquarters	Tripping and slipping hazards on office floor	Papers and other materials on floor picked up
Headquarters	Scale for weighing crates removed	Scale located and re-installed
Aptos	Redesign of staff area	Ongoing



Accident/Incident Review

Branch/Worksite	Description	Recommendation/Solution
Off-site	Walked into glass partition	Watch where going!
Live Oak	Strained back while sitting, moving, and reaching at same time	Recommend purchase of chair mats and staff retraining in proper lifting/sitting ergonomics
Central	Punctured by lancet left on shelf in magazine section	Check area before reaching for materials
La Selva Beach	Allergic reaction to fumes from newly painted building	Temporarily reassigned.
Garfield Park	Injured right hand unfolding attic ladder	Recommend Building Maintenance personnel lower ladder
Headquarters	Hit in shoulder by falling fan stored on lockers	Recommend locker top not used for storage or items securely place to the rear.
Headquarters	Injured knee while lifting boxes	Recommended refresher safe lifting training

Submitted by Sandi Imperio, chair
July 7, 2007



Appendix A: Response to length of desk shifts

The main reason the number of hours per circ shift was changed is to reduce repetitive stress injuries. This has been corroborated by the drop in RSIs (see attached doc 1) since we changed the scheduling policy (see attached doc 2) in March 2004.

However, it should also be noted that at branches with lower circ and combined Ref/Circ Public Services desks, staff do work more than 4 hours on desk because they have more opportunities to take micro breaks between patrons, and alternate tasks. In the larger branches, desk staff wait on patrons or discharging/routing in material continuously -- performing the same motions repeatedly and in most cases, standing.

If anyone wants to compare the library staff to grocery store clerks, they should then consider:

1. Library staff has to open most items to scan barcodes
2. A date due card must be taken in/out of every item
3. The library has tabletop scanners (grocery stores have them embedded in the counter with multi-position reading)
4. Most grocery stores have conveyor belts that bring the item closer to the clerk (Library staff must reach for them)
5. Most of our branches have circ desks that pre-date computers --- they are too high and/or too wide to be ergonomically correct.

I hope this answers their inquiry

Sandi Imperio
Safety Committee, chair



Safety Considerations When Scheduling

March 2004

As part of the library's ongoing effort to improve the work environment and safety, Public Services desk supervisors should take the following into consideration when scheduling staff:

1. Shifts four hours or longer must incorporate at least one fifteen minute break

Breaks should be taken away from the public area to minimize work related interruptions.

2. Short stretching exercises should be done every hour. These stretch breaks can range from 10 seconds to 3 minutes depending on the stretches involved.
3. Circulation duties (checkouts, discharges, patron registrations, route ins, etc) should be rotated among all scheduled desk staff.

Varying duties will lessen the impact of the repetitive motions involved in most circulation functions.

4. Set realistic timelines and staffing levels for routine task completion.

Injuries occur when staff rush to complete tasks and do not take appropriate safety measures (breaks, stretching, proper lifting techniques, etc.). For example, the day after a holiday all the route-ins may not be accomplished.

5. Vary desk shifts for staff who work the desk daily.

Although consistent scheduling is sometimes preferred by staff, varying the staffing during the busiest shifts of the day will help spread out the workload.

intranet/personnel/schedules/holidays/schedules/safety.html



Accident Review – RSI

TOTALS BY FISCAL YEAR

	APT	B40	BC	BKM	CAP	CEN	FEL	GP	HQ	LSB	LO	SV
1999-2000	1	3	1	0	0	3	0	1	0	0	0	0
Total	9											
2000-2001	0	2	0	0	1	2	0	0	0	0	0	0
Total	5											
2001-2002	0	0	0	0	0	1	0	1	1	0	0	0
Total	3											
2002-2003	2	1	0	0	0	4	0	1	2	0	2	1
Total	13											
2003-2004	0	1	0	0	0	4	0	0	2	0	0	0
Total	7											
2004-2005	0	0	0	0	1	1	0	0	2	0	0	0
Total	4											
2005-2006	1	0	0	0	0	0	0	0	2	0	0	1
Total	4											
2006-2007	0	0	0	0	0	0	0	0	0	0	0	0
Total	0											
<p>July 1999 to June 2004: 37 or an average of 7.4 July 2004 to March 2007: 8 or an average of 2.67</p>												



**SANTA CRUZ PUBLIC LIBRARY SYSTEM
SAFETY COMMITTEE RECOMMENDATION
STAFF ERGONOMIC AND WELLNESS TRAINING**

Calvin Trimpey (Chair)
Gale Farthing
Laura Whaley
Diane Cowen
Wendy Smith

A PROGRAM FOR STAFF ERGONOMIC TRAINING AND WELLNESS

Typical motivations for health and safety training (state and federal requirements or the containment of workers' compensation insurance costs) are not necessarily effective motivators for improving on the job fitness or the practice of safe work habits. Training is a chore. Learning, however, is a process of self-enrichment. Therefore, health and safety training should contribute to staff well being as a whole; as an opportunity to improve the quality of life for everyone in the library. Health and safety training should become an integral part of the on-going learning process that teaches us about ourselves and how we can better gain control over the physical conditions that effect us.

The following recommendation outlines a multi-part program intended to provide cost effective high quality ergonomic and safety training. A thorough review of library accident and injury reports, current independent research on occupational wellness and training, as well as a recently conducted staff survey form the basis for the conclusions we have drawn about the training needs of the Library. As a result, the committee agrees that those needs can be effectively met with a strategy that promotes the physical and emotional health of each individual while respecting and appealing to the many different attitudes of staff.

TRAINING NEEDS

1. Reduce the number of injuries, both reported an unreported
2. Develop and maintain interest in ergonomic information as well as personal health and fitness
3. Development of a library specific training model
4. Immediate ergonomic training for newly hired employees
5. One-on-one training on the application of ergonomic concepts for newly hired employees and employees new to a position
6. Reduce the cost of ergonomic and safety training
7. Address declines in morale: including the need to restore confidence in the library's ability to maintain a safe work environment as well as some means to reduce job-related stress



Our group unanimously decided that in order to maintain staff interest and retention of ergonomic health and safety training, the manner in which that training is delivered should be refreshed periodically. This would mean changing either the consultant, training material, and/or method of delivery.

We also agreed that having staff members receive special training to become trainers themselves would serve multiple and complimentary purposes. First, refresher training administered by staff instead of a consultant would save money. Second, the opportunity to become an ergonomic trainer oneself might increase interest in the subject of library ergonomics among staff. As more and more staff become increasingly proficient in their knowledge and ability to communicate ergonomic and safety information, so will our ability to produce an effective and useful library specific model of ergonomic training for the future. The creation of this model is also one possible strategy to acquire grant funding.

Work place safety training and health promotion should be experienced as something positive that is offered to staff rather than something punitive or imposed. Negative perceptions of FIT Training, and by extension ergonomic and safety training itself, detract from the importance of the subject matter as well as from its' retention. For many, the negativity associated with imposed FIT training informs judgments about their position in the staff-management relationship. As more of those judgments take on the negative perceptions that come from poorly conducted and received training, the manifestation of a set stressful work characteristics that contribute to work-related injury and illness are more likely. In the future, we should avoid the pitfalls of declining morale, low interest, and poor retention. Rather, staff perceptions regarding the purpose and value of the training should reflect the high value that library management places on it's employees.

For this reason, the committee finds it vitally important to incorporate a flexible learning program that addresses the over-all health of staff into the framework of library ergonomics and safety. Doing so is comparable to supplying staff with better equipment to perform their jobs. Staff who are fit, both physically and psychologically, are better able to withstand the rigors of repetitive computer and book related tasks. Creating opportunities to alleviate stress, increase stamina, and maintain flexibility may transform the performance levels of an increasingly fatigued and over-worked staff, as well as raise morale.

RECOMMENDED PROGRAM

This model can be fine-tooled with the help of the new consultant to address specific library concerns as well as be flexible enough to adapt to changes in library organization and technology in the future.



Program Components

- III. Consultant: criteria and evaluation
- IV. Staff Trainers and Supervisors
- V. New Employee Training
- VI. Training for all staff and refresher training
- VII. Opportunities for health improvement and wellness
- VIII. Evaluation process

Proposed Library Safety and Wellness Program Outline

I. The Consultant

The committee strongly recommends the consultant be a medical professional specializing in orthopedics, with ergonomic consulting and injury rehabilitation experience. Responsibilities include the creation of training modules and materials, including handouts, of at least one hour each for all New Employee Training classes, supervisors, and staff trainers.

Topics to be covered by consultant:

(S) Indicates supervisor training topic

- * Review safe work practices
- * Motivating and managing employees' with differing levels of enthusiasm and cooperation (S)
- * Motivating self and others to change unsafe habits, work safely
- * How to implement refresher training sessions (S)
- * One on one work site evaluation and set-up
- * How best to reinforce ergonomic information in other training modules
- * How to apply training to duties at the work-site; one-on-one training, one hour per employee for all new employees, all employees new to a position or facility, and all employees having comfort or other ergonomic issues on "as needed" basis

Topics included in training but covered by staff:

- * Worker's comp procedures
- * Equipment availability and acquisition
- * Handling safety suggestions, unsafe condition reporting protocols



IX. Staff Trainers and Supervisors

Staff who volunteer to become ergonomic trainers should receive in-depth training that focuses on applying the training concepts to particular positions and tasks in the library. Staff trainers are then responsible for system-wide refresher training on a bi-annual basis. Since supervisors and Branch Managers are ultimately responsible for facility safety and the safety of the working environment of employees, they should receive the same specialized training as the staff trainers. The ergonomic and safety modules of the new employee training should be reinforced in all subsequent training modules as appropriate. Therefore, the in-depth training should also be attended by staff who conduct certain NET modules. The consultant may assist with strategies to incorporate the concepts in other modules.

Selection of trainers who have the desire to do so should be on a voluntary basis. However, consultation with union representatives to define the particulars of such additional job duties should occur before any staff person takes on added responsibilities.

X. New Employee Training

The committee recommends that the library invest in a strong preventative ergonomic and safety program for new employees, including current employees new to a position. The consultant should administer both one-on-one and group training.

The learning objectives listed below should be the basis for new employee group training modules. The concepts should be reinforced and the application of those concepts should be demonstrated in other modules as appropriate. After completing the NET module, the consultant will have a 1-2 hour personalized focused training at the job site.

Learning Objectives should include:

- * worker's comp procedures
- * equipment availability and acquisition
- * handling safety suggestions, unsafe condition reporting protocols
- * review safe work practices
- * motivating and managing employee safe work habits when there are differing levels of enthusiasm and cooperation
- * how to implement refresher training sessions

Content of one-on-one training should include:

- * One-on-One work site evaluation and set-up (including half-time shared work stations)
 - * discuss any special physical requirements necessary due to preexisting injuries or conditions



- * participation, demonstration, observation of safe work habits and movement

IV. **Refresher training for all staff**

The committee recommends that all staff have the training with the consultant once. An alternative may be to have staff trainers administer this training with the curriculum and materials provided by the consultant.

Bi-annual refresher training limited to thirty-minute classes should be conducted by staff trainers. The training should cover a review of curriculum from NET modules. At this time, any new literature should be distributed and any suggestions for maintaining vigilance should be offered.

V. Overall wellness and stress reduction

In keeping with the findings of current research in occupational medicine, this committee believes that the overall health and well being of employees is a contributing factor in whether or not most injuries occur in the work place. We recommend that the library incorporate programs that exert a positive influence on the overall health of workers by scheduling conveniently located activities that reduce stress, improve physical strength and endurance, and maintain the flexibility of both mind and body.

As a way to improve morale, time created and allowed for participation in activities that reduce stress and promote fitness communicates the library's expectation of staff to accept responsibility for their own safety and good health, as it simultaneously communicates respect for the important responsibilities of our staff's roles outside of the library.

A staff survey yielding roughly 80 out of 140 staff responses indicate a high level of interest in a variety of fitness and health related activities if they were offered or sponsored by the library. Recent medical studies indicate that yoga is helpful for sufferers of carpal tunnel syndrome and other RSI's. A 1998 study published in the *Journal of the American Medical Association* (280:1601-03) even goes so far as to suggest that yoga may be more effective in treating carpal tunnel syndrome than more conventional therapies in current use. Cumulative stress and strain also respond well to massage, which improves circulation to affected areas and relaxes muscles.¹ Considering staff interest in these new approaches to reducing the impact of RSI, the committee considers these activities vitally important components of the program.

¹ Condor, Bob. "Alternative Watch: Take time to get a looser grip". Chicago Tribune (IL); 11/03/2000.



ON-SITE MASSAGE

“Massage increases blood flow, reduces edema, decreases muscle spasms, deactivates trigger points, breaks up fibrous adhesions, aids in stress reduction, and may improve psychological factors (associated with work place injuries)”²
The committee strongly recommends on-site massage as a relatively inexpensive way to reduce psychological as well as physical stress with immediacy. Scheduled visits weekly, bi-weekly, or other to all branches of two CMT’s working in tandem would be best to accommodate our large staff. The boost to morale would surely be astronomical.

Industry standard for chair massage is \$1.00 per minute. In order to gain any benefit from the massage it must be performed for a minimum of 10 minutes on an individual. Therefore, the committee recommends 10-minute on-site massage during working hours for any staff member who is present on the day of a regularly scheduled visit by a Certified Massage Therapist.

A minimum of 2-3 staff at remote locations (i.e. LSB, BC) may be required for the CMT to consider travel to that location viable. A maximum of 6-8 people per day is required for the health and safety of the CMT.

If we anticipate participation of staff to be approximately 66% (based on the number of people who gave massage a score of 1 or 2 in the survey we sent to all staff) number would be approximately 92 people. Annual cost for this many people to receive a 10-minute massage on a monthly basis: \$11,040. Although the committee is of the opinion that massage will yield rewards well worth this price, we acknowledge that sharing the cost with interested employees may be a more feasible approach. Projected annual cost would then be reduced to \$5,520.

Recommended Certified Massage Therapist’s:

Georgia Carreras-Thurm CMT (831) 234-7920
Swedish/Acupressure, Deep Tissue, Therapeutic Massage
Also has experience as library volunteer

Debra diMartini- CMT (831) 345-6913 cell (831)
724-5771 wk/hm
Wells Fargo Bank at Soquel Dr. and State Park Dr. currently
Contracts with her to do weekly on-site chair massages for
their bank's staff. She invites the library to contact them regarding
their experience with her.

²Lowe, Whitney. *Overuse Injuries*. Massage and bodywork. April/May 1999, Vol. 14 issue 2, p52.



YOGA

On-site yoga classes generated high interest among staff, surpassed only by massage. Sixty eight percent of the 80 staff survey respondents actively interested in attending. Of those, 78% gave it a 1 or a 2, indicating high priority.

The yoga instructor we recommend is also the most reasonably priced.

Instructor: Jeevan Kracht

Minimum charge for a private class: \$60.00
Included in this price: mats provided during class
blocks and straps provided during class

Here are 3 possible scenarios for and annual cost for class offerings:

PLAN	DESCRIPTION	ANNUAL COST
A	1 class a week at each of the 12 branches @ \$60.00 per class	\$2880.00
B	Bi - monthly classes at each of the 12 branches @ \$60.00	\$1440.00
C	Variable: Classes held at certain central locations (Central, Scotts Valley, Aptos, Live Oak); Open to all library personnel; Schedule varies with classes a few times a week at different times of the day. For example: 2 classes at each of the four locations per week \$60.00 per class =	VARIABLE EX. \$1920.00

Instructor Comments and Recommendations:

I don't really (mind how many) attendees (at each class).

I feel once a week is best for people to work with their bodies

Twice a month or once a month really isn't going to help except maybe educate and

inspire them to seek it on their own. And that is good too.



There might be some benefit to (have the classes) open to city employees other than just library staff
I'm flexible on times and dates, and I am open to any ideas or different configuration of classes.

FITNESS CLUB MEMBERSHIP

Because fitness clubs also offer classes in virtually all activities that generated interest among staff, we also contacted local fitness clubs for estimated costs of corporate memberships.

24 Hour Fitness supplied estimated cost based on a 200 employee membership along with other material about their program (see appendix I). Annual employer cost for this many is \$1500. Employees would pay no enrollment or processing fees. Annual membership for a single employee would then be \$41.99 per month.

Toadal Fitness appears to be well suited to the varied interests of staff, with facilities spanning the county.

Based on the number of employees enrolled, enrollment fees to any of our 3 clubs can be greatly discounted. Having 3 locations within a 5 miles radius gives your employees a fair amount of options. The current monthly dues vary from 33 to 39/month for the adults, 20 to 40/month for the kids. The prices are based on the time and the activities people are interested in.

TOADAL FITNESS
FITNESS
113 Lincoln St
Soquel Dr
Santa Cruz CA 95060
95003
Phone 831-423-3764
475-5979

TOADAL FITNESS
1200 17th Avenue
Santa Cruz CA 95062
Phone 831-464-3764

CABRILLO
Suite 1086200
Aptos CA
Phone 831-

CONSULTANTS CONTACTED BY THIS COMMITTEE

*All consultants listed were recommended verbally by Jennifer Green of Dominican Occupational Therapy in an informal phone discussion with a member of the committee.

Graham-Garcia, Barbara

Redwood Therapy Solutions (831) 722-9680 | (831) 761-0163
77 Aspen Wy. Ste. 101; Watsonville, CA 95076
Associates: Shelley Neat, PT



Erin Adams, PT

Prefers to meet with management to assess needs. Able to address problem or target areas i.e., older employees, injured employees. Can focus on problematic areas. Training groups can be constructed in any arrangement.

Has done work for County of Monterey and has spent time training in their library system. Contact person to discuss her performance and their experience: Fayedra Matthes 755-4574.

In general: \$350 for 2 hour training which includes ergonomic principles, handouts, and general exercise. Limits training classes to 20 employees at a time. Actual cost will depend on her assessment and our requests.

Tucker, Jim

Seascape Physical Therapy (831) 687-0985
15 Seascape Village, Aptos 95003

Van Dyke, Jerry

Coast Rehabilitation (831) 688-1212
7010 Soquel Dr. Ste. 105, Aptos 95003

Has done wellness program for Gallo Winery and other large corporate employers. Prefers to meet with management and staff to ascertain system training and wellness needs. The office is a small fitness center geared toward injury rehabilitation. Membership to the fitness center is \$50 per month per employee. However, the center is limited in it's capacity to accommodate a large staff such as ours.

Consulting fees in general are \$200/hr. However, no fees are set (except workout facilities). He explicitly stated that whatever our budget for such a program, he would be able to offer some type of program

EVALUATION OF THE PROGRAM

1. Reaction (staff perceptions of training and trainer)
Some data which determines staff reactions to the training should be collected for all training classes and activities. Staff satisfaction with the training and trainers can be collected by anonymous questionnaire after the training had been administered.
2. Comparative Performance
We should collect data on staff knowledge of the learning objectives before the training via pre-training questionnaire. This can be compared to staff knowledge of the learning objectives after the training via post-training questionnaire. As an alternative or in addition, we may ask staff to keep a 3-test behavioral assessment (see



appendix II) as a way to measure learned knowledge of the objectives as well as to measure changes in behavior indicating applied knowledge.

3. Applied knowledge

After the training, an “action plan” for applying what has been learned on the job may be initiated. It is possible that staff may decide to incorporate the plan into annual appraisal learning objectives.

Staff could also partner with another staff member at their branch to produce observational evaluations of each other’s applied knowledge. This would be for the benefit of and kept by the individual only, not to be collected or included in any evaluation of the employee. At this stage, criteria for evaluation would be articulated by partners.

4. Behavior

The ability to apply concepts to everyday work and other activity may be evaluated by a three-month follow up to the post-training questionnaire. Knowledge applied at the work site (this may include fitness activity) can be evaluated by self, peer, and supervisor observation. Self-evaluation of action plan success can be collected at this time.

5. Participation in any activity the library provides or subsidizes shall be monitored on a regular basis for participation levels. Data regarding staff satisfaction with those activities and the providers/instructors of those activities shall be collected and included with the three-month follow-up questionnaire.

*All training evaluation, except where noted otherwise, should be kept anonymous and confidential.



SANTA CRUZ • PUBLIC
LIBRARIES
A City County System

ANNUAL STATISTICAL REPORT FY 2006-2007

Here are the statistical highlights of the Library System's just-completed fiscal year. The later pages of this report provide tables and comment on several of the more important statistical measures.

- ❖ Checkouts of library materials exceeded 2 million for the first time, up nearly 4% from FY 2005-06.

A big portion of the increase was a 14% rise in web site renewals. Electronic renewals accounted for 411,216 of the 2,051,331 total checkouts. Library users used to have to come in to a branch to renew an item they wanted to keep another two weeks. Now they can do it much more conveniently online.

- ❖ Nearly a third of the checkouts were of non-book materials—videos, CDs, audiotapes, magazines, and the like. This is an increase from last year.
- ❖ The most heavily checked out non-book items were videos and DVDs (78% of the non-book total). Electronic books accounted for 28,104 checkouts (more than double the number in the previous year) reflecting the fact that we have many more titles available for users.
- ❖ We collected \$243,549.41 in fees and fines, which works out to 12 cents per item checked out.
- ❖ Borrowers checked out 9.99 items per capita of our State Finance Department population and 10.07 items per capita of our Library Financing Authority population. The average per capita check out rate for libraries in our State population group last year was 4.48 items. Our rate is exceeded only by Santa Clara County (22.32 items per capita) and San Mateo (10.56 items per capita).
- ❖ Requests for materials were up again—from 212,146 in 2005-06 to 237,865 placed in 2006-07. Of that number we filled 87%. We suspect the reason the number keeps rising is that the Library's automation system makes it increasingly easy to ask for wanted items: users do not have to visit a branch to place a request—they can do it on-line.

- ❖ The Library staff borrowed 2,379 items via interlibrary loan for our users, and handled 3,304 loans to other libraries. These are big jumps up from the previous year because the Library's catalog is now on the national database, OCLC. Interlibrary loan requests are primarily for items that are out-of-print or are more specialized than warrant purchase by a public library system. We do track requests by subject, however, to make sure that we aren't failing to purchase materials in areas of high interest to our users.
- ❖ On June 30, 2007 we had 252,725 unique titles in all formats in the collection, and 568,688 items. During the fiscal year we purchased 36,184 items: 32,267 books and 3,917 media items. More information on the Library collections appears later in this report.
- ❖ The Library subscribes to 27 electronic databases that are mounted on our Website and available to users. Most can be accessed from a home computer using a library card and a pin number. Licensing restrictions make others available only at library sites. Both libraries and the vendors continue to struggle with how to track actual use. Some vendors keep statistics by session (the user logs on to the database and uses it for an indefinite time; this is one session), and others by searches (one query of the database equals one search). There is at least one vendor (*Rich's Business Directory*) that does not see libraries as a significant client base, and provides no mechanism for any record keeping at all.

We tallied 23,195 sessions during the fiscal year, and 108,165 searches, but we regard this data as highly suspect.


- ❖ Six of our Branches had reading discussion groups for adults last year, and there were seven for young people.
- ❖ On May 31, 2007 we had 61,474 **active** registered borrowers, meaning people who have used their cards to checkout materials within the last two years. The number of card holders is 128,255, of whom 14% are children and 4% teenagers.
- ❖ Interestingly, a random check of borrower card use during June revealed that a number of people had never used their cards to check out items, but **did** use their cards to access databases on the Library's web site. This confirms predicted trends: that within the next few years the majority of Library users will be accessing electronic resources rather than checking out items. During FY 2007-08 we will look at changing the definition of an "active" card to include electronic use.

- ❖ Volunteers, whether Friends of the Library, court referrals, or youth completing community service requirements for school, contributed 15,672 hours of service during the Friends fiscal year (May through April).
- ❖ The Young People's staff at all branches gave 751 programs (mostly story hours) for 18,454 preschoolers, parents and caregivers, and another 443 programs for 7,087 school-aged youngsters and their teachers. They also managed 425 class visits from both day care centers and the schools, involving 8,674 children and teachers. A "class visit" usually involves a presentation about the library and its resources, and instruction in how to use the computers or find information for the current assignment of the class. A story is often read to younger children.
- ❖ "Paws, Claws, Scales, and Tales" was the theme of the 2006 Summer Reading Program, which is co-sponsored by the Friends of the Santa Cruz Public Libraries, Inc. 2,544 children participated in the reading part of the program with 1,095 (43%) finishing and collecting an average of 13.04 Summer Reading Dollars apiece. The Summer Reading Dollars can be used at local sponsoring stores.
- ❖ There were a total of 233 special Summer Reading events, attended by more than 4,300 youngsters and parents. Twenty three Young Friends volunteered 166.75 hours of time for the Summer Reading Program.
- ❖ The Summer Reading Program traditionally includes a Festival of the Book and Kids Only Book Sale at Harvey West Park. The Friends of the Library supplied hotdogs for one and all. The Kids Only Book Sale earned \$1, 802, selling out as usual.
- ❖ The Gault School on the Eastside was the site of the 2006 Santa Cruz City Schools Summer School. Our Branciforte Branch hosted 27 class visits attended by 534 students and 50 supervising adults during the six week session.
- ❖ The Library System also sponsored or hosted 631 programs aimed at adults, with 8,611 attendees. 247 of those were Outreach staff programs at nursing homes, senior residences, and staff (as distinct from volunteer) visits to homebound people, with 2,392 adult contacts.
- ❖ 2006-07 was a transition year for our Outreach Program staff, as we moved staff who had been funded by First 5 grants into regular status, and expanded our services to child care providers by adding day care centers. First 5 funds continue to support the program. We also obtained a First 5 grant to start a three year program called Family Place. Parents and children come to a branch library for a story hour and program, and they meet informally with professionals who coach them or provide information about subjects of interest to parents: nutrition, reading readiness, health matters, etc. The first series was at the Branciforte Branch, and was such a

success that the parents asked if they could hold "reunion" meetings. The next series will be at Live Oak.

- ❖ Our Adult and Reference Services division has also began a shift from question-answering to training and programming for adults. Reference staff gave workshops on using the Internet and the Library's resources, we had an Adult Summer Reading program, and the staff does a great deal of support work for reading groups both at Branches and in people's homes. The coming year will be one of experimentation. In a culturally rich community such as Santa Cruz County, the public library does not necessarily need to focus its resources on a large programming effort. But there are information needs here that no one else is meeting and we are working to identify them and determine the best methods for meeting them.
- ❖ Library staff participated in 186 training events, with 852 attendees, totaling 2,133 staff hours. That's roughly eighteen hours per staff person, and includes the orientation and training we do for new workers. Training and re-training is important for library workers because technology changes so rapidly, and the demands of a very diverse public are so great. This year we did Intellectual Freedom Refresher Training at all Branches, using "Stop Action" scripts Janis O'Driscoll had acquired as Chair of the California Library Association's Intellectual Freedom Committee. These provoked useful discussions with staff at all levels about how to handle sensitive IF issues. The most popular Infopeople Workshop during the year was called "Customer Service Skills for Culturally Diverse Communities. We also ran seven ergonomic trainings attended by 19 people.
- ❖ Staff also worked on a signage redesign program, began a major overhaul of the library website, studied the job specifications for all support staff, and collectively devoted considerable thought to how public services should be configured to meet 21st Century information needs.

Santa Cruz County makes high demands for library service, which our very competent staff works hard to meet. In summary, FY 2006-2007 was a busy year for staff, users, and volunteers at the Library. The following pages contain more detailed statistical information.



Anne M. Turner
Director of Libraries
August 15, 2007

CIRCULATION DATA

**NUMBER OF ITEMS CHECKED OUT
 BY BRANCH FY 2006-07**

BRANCH	2005-06	2006-07	DIFFER- ENCE		OPEN HRS/YR	CIRC/ OPEN HR
ALBA	34	248	214			
APTOS	239,677	238,066	(1,611)	-1%	2,808	85
BOULDER CREEK	53,384	51,534	(1,850)	-3%	1,924	27
BRANCIFORTE	135,327	120,303	(15,024)	-11%	2,132	56
CAPITOLA	140,057	124,112	(15,945)	-11%	2,184	57
CENTRAL	553,895	520,685	(33,210)	-6%	3,016	173
FELTON	44,521	44,382	(139)	0%	1,924	23
GARFIELD PARK	50,062	54,390	4,328	9%	1,664	33
LA SELVA BEACH	16,841	16,940	99	1%	1,612	11
LIVE OAK	53,845	127,344	73,499	137%	2,600	49
OUTREACH	43,059	40,626	(2,433)	-6%		
SCOTTS VALLEY	182,338	180,932	(1,406)	-1%	2,496	72
SUBTOTAL	1,513,040	1,519,562	6,522	0%	22,360	68
HQ & SYSTEM	5,675	5,861	186	3%		
ELECTRONIC BOOKS	10,678	28,104	17,426	163%		
PHONE RENEWAL	86,112	86,588	476	1%		
WEB2 RENEWAL	360,481	411,216	50,735	14%		
SUBTOTAL	462,946	531,769	68,823	15%		
GRAND TOTAL	1,975,986	2,051,331	75,345	4%		
CIRCULATION.06						
7/30/2007						

We also track the residence of library borrowers. The percentages in the tables below are roughly what they have been for the past three decades: one third by City of Santa Cruz residents, and two thirds by all others.

**CHECKOUTS BY RESIDENCE OF BORROWER
 FY 2006-07**

City of Santa Cruz Residents	672,880	33%
County of Santa Cruz Residents	1,095,976	53%
Capitola City Residents	85,302	4%
Scotts Valley City Residents	151,887	7%
Watsonville City Residents	20,346	1%
All Other Circulation	24,940	1%
	2,051,331	100%
REGQUAL.07		
7/30/2007		

**CHECKOUTS BY RESIDENCE OF BORROWER
 1996-97 – 2006-07**

	Santa Cruz City	County Unincorp.	Capitola	Scotts Valley	Watson- ville	Other	Total
1996-97	444,746	699,023	55,001	85,959	8,706	14,978	1,308,413
1997-98	486,989	812,097	60,591	105,067	9,649	12,890	1,497,283
1998-99	478,791	845,818	61,426	110,398	11,150	8,957	1,516,540
1999-00	439,679	847,875	69,951	110,464	10,737	10,245	1,488,951
2000-01	531,505	892,980	74,862	123,079	11,283	12,321	1,646,030
2001-02	572,007	965,729	80,802	134,675	12,675	15,007	1,780,555
2002-03	607,193	1,019,071	82,520	134,573	16,098	17,801	1,877,256
2003-04	605,588	998,462	80,631	135,438	16,312	19,731	1,856,142
2004-05	637,241	989,588	86,767	146,071	20,554	19,518	1,899,739
2005-06	664,753	1,030,254	85,635	151,993	21,193	22,158	1,975,986
2006-07	672,880	1,095,976	85,302	151,887	20,346	24,940	2,051,331
	REGQUAL HIST						
	8/3/2007						

THE LIBRARY COLLECTIONS

**LIBRARY COLLECTIONS BY BRANCH
 JUNE 30, 2007**

BRANCH	2003-04	2004-05	2005-06	2006-07
ALBA	18	18	12	12
APTOS	61,990	61,724	61,698	61,681
BOULDER CREEK	31,127	29,174	27,376	26,410
BRANCIFORTE	52,627	51,698	50,461	48,852
CAPITOLA	32,977	32,566	32,032	30,788
CENTRAL	238,009	229,333	233,397	231,037
FELTON	20,250	18,622	18,268	16,983
GARFIELD PARK	14,521	14,372	14,391	14,198
HQ & TECHSERV	17,517	12,642	15,858	18,129
LA SELVA BEACH	14,249	13,547	12,590	11,441
LIVE OAK	23,337	22,727	35,328	43,019
OUTREACH	17,365	17,619	18,187	18,397
SCOTTS VALLEY	47,902	47,494	48,261	47,741
TOTAL	571,889	551,536	567,859	568,688
CO. LAW LIBRARY	2,138	2,163	2,228	1,977
COLLECTIONS.07				
8/1/2007				

The figures in the Collections table do not include copies of periodicals. The number of subscriptions at each Branch is presented below.

Although we acquired slightly more than 36,000 new items during the fiscal year, the collections at nearly half of our Branches declined slightly. The reason was heavy weeding, undertaken because:

- If we don't weed, we don't have room for new items with more current information. Most of our Branches are too small for the number of people they are endeavoring to serve and the size of the collections the public demands.
- We have been particularly rigorous in weeding during the last few years because over-crowded shelves cause worker injuries.
- The Branch Manager and staff have particularly focused on weeding the Felton Branch which has the square footage for half the number of items actually housed there. Weeding the collection down to a more sensible level creates a far more inviting facility, and gives both the staff and the public more elbow room for other activities.

**PERIODICAL AND NEWSPAPER SUBSCRIPTIONS
 JUNE 30, 2007**

BRANCH	ADULT	JUVENILE	GIFTS	NEWS- PAPERS	TOTAL
APTOS	115	22	11	10	158
BOOKMOBILE	21	14	1	0	36
BOULDER CREEK	44	18	4	5	71
BRANCIFORTE	80	29	7	4	120
CAPITOLA	47	16	7	8	78
CENTRAL	324	30	30	26	410
FELTON	23	15	5	2	45
GARFIELD PARK	23	31	2	2	58
HEADQUARTERS	32	0	0	2	34
LA SELVA	19	10	7	1	37
LIVE OAK	91	32	2	7	132
SCOTTS VALLEY	72	24	0	7	103
TOTAL	891	241	76	74	1282
PERIOD.07					
8/1/2007					

BRANCH BUSYNESS

The Library collects visitor data at each branch, using counters attached to the security devices at each entrance. The data is unreliable, but in a consistent way. That is, the counters regularly break down, and people (especially children) skew the data by playing with the light indicators. We could adjust the collected data based upon a formula derived from an accurate hand counted sample. But since our interest is really to measure trend data, this does not seem worth the trouble.

The Table below shows the total visitor count (divided in half) by hour for each Branch. The Table confirms what we know from checkout data: Central is the busiest facility (as it should be), and Aptos and Scotts Valley are roughly comparable. Use at Branciforte fell when its services were reconfigured to the Tier I level, but is still very high. Capitola remains much busier than its peer Tier I branches, Felton and Boulder Creek. Live Oak is an example of the aphorism "If you build it they will come."

VISITOR DATA BY BRANCH BY OPEN HOUR

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
APTOS	48	64	63	56	60	56
BOULDER CREEK	28	23	24	22	21	19
BRANCIFORTE	54	57	65	68	58	59
CAPITOLA	38	39	44	51	45	40
CENTRAL	149	145	154	149	148	142
FELTON	25	24	23	26	24	21
GARFIELD PARK	14	26	27	30	33	35
LA SELVA BEACH	18	19	19	17	17	27
LIVE OAK	33	34	30	0	39	50
SCOTTS VALLEY	58	60	58	59	64	57
SYSTEM AVERAGE	52	54	57	60	58	52

NOTE: Significant declines at any Branch are due to Branch closures: Garfield Park for renovation in 2000-01, Live Oak for construction beginning in June 2003-04, Aptos for interior modifications in 2004-05, Boulder Creek and La Selva for painting in 2006-07.

OPEN HOURS declined from 470 in 2001-02 to 430 in 2006-07.

REFERENCE SERVICES

Reference queries handled increased by 3% over FY 2004-05, largely due to a full year of service at the Live Oak Branch.

**REFERENCE QUERIES BY BRANCH
 FY 2006-07**

BRANCH	2005-06	2006-07	%
			CHANGE
APTOS	39,102	39,843	2%
BOULDER CREEK	5,416	5,243	-3%
BRANCIFORTE	27,901	31,454	13%
CAPITOLA	34,715	34,207	-1%
FELTON	23,135	15,274	-34%
GARFIELD PARK	13,648	15,387	13%
LA SELVA BEACH	4,739	3,158	-33%
LIVE OAK	10,688	20,290	90%
MOBILE SERVICES	8,328	12,826	54%
SCOTTS VALLEY	39,535	36,090	-9%
SUBTOTAL	207,207	213,772	3%
CENTRAL ADULT	81,187	79,718	-2%
CENTRAL YOUTH	25,102	29,481	17%
SUBTOTAL	106,289	109,199	3%
GRAND TOTAL	313,496	322,971	3%
REFERENCE.07			
8/2/2007			

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AMT:DSTATREPT.007



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 A. MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

August 24, 2007

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

QUARTERLY REPORT ON MEASURE B RECEIPTS

At its January 10, 2005 meeting the Library Financing Authority requested that this office provide the members of the Authority with a report on the quarterly receipts from the Library Sales Tax Measure.

- ✓ The attached table provides quarterly and annual data for Measure B for the period 1997-98 through 2006-07.
- ✓ The attached graph provides a comparison of quarterly estimates and actual receipts to date for the 2006-07 fiscal year.

If you have any questions regarding the attached material, please give me a call at 454 3401. I will send you an update at the end of the next quarter.

Very truly yours,

Pat Busch
Assistant County Administrative Officer

Attachments

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
Each City Manager

**Measure B Receipts
Quarterly and Annual Data**

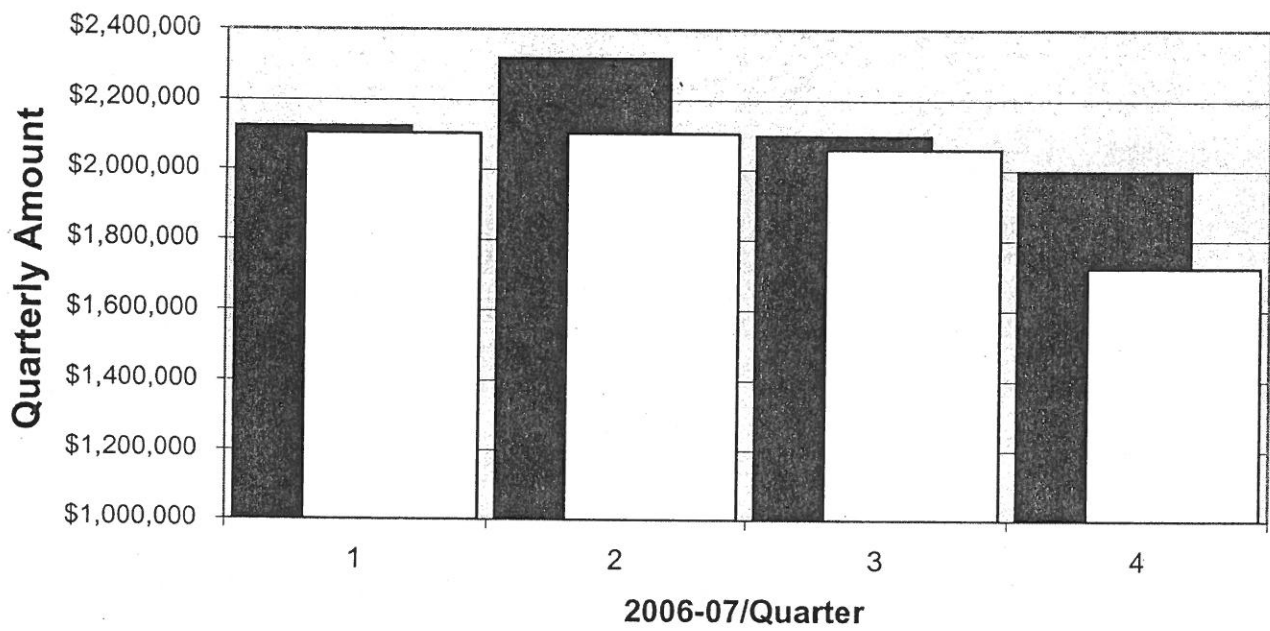
August 2007

Measure B Receipts - Quarterly and Annual

Year	Quarter	Quarterly Actual	Current Estimate	Annual		
				Actual	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	2,105,306			
2006-07	2	2,318,897	2,104,989			
2006-07	3	2,098,577	2,060,642			
2006-07	4	1,998,430	1,722,524	\$8,539,942	\$390,724	4.79%

Measure B Quarterly Receipts

■ Actual □ Estimated Quarterly Receipts



LIBRARY JOINT POWERS AUTHORITY BOARD
SANTA CRUZ COUNTY GRAND JURY REPORT
2006-2007

DRAFT

RESPONSE

FINDINGS: 1, 3-7
RECOMMENDATIONS 1-4

1. Director of Libraries Review Process

Agree

3. Alternatives to 1543 Pacific Avenue

Agree

The City of Santa Cruz has purchased property at 212 Locust/117 Union Street (across from the Central Branch Library) that Library System Services will occupy, sharing the space with the City Water Department. The Library will pay a fixed rent based on its share of the City debt amount, which will cease in twenty years. Tenant improvements are currently underway, and the Library hopes to occupy the space by Spring, 2008.

4. Funding Plans

Agree

5. Contingency Planning

Agree

6. Worker Safety

Agree

The Library has made significant progress in reducing the number of worker injuries by training, evaluation of work sites, purchase of equipment, and on-going work with the Staff Safety Committee.

7. Hiring Practices

Disagree

The Library System follows the mandated procedures of the City of Santa Cruz Human Resources Department in its hiring practices. Every vacant position is advertised to all internal staff. Over the last eighteen months, 50% of the vacancies were filled the inside candidates, and 50% by outsiders. The Library's practice is to hire the person who is the best "fit" for the opening available, which is not always a current staff person. Not every employee may agree with the decisions made, but then not every employee knows the full details about any particular hire.

Other Issues:

Half-time staff: no comment

More frequent branch staff meetings: no comment

April 2006 Staff Day

The topic of the day what **not** the Central Branch, but rather an all-staff discussion of how the library could improve the way it is providing services in a 21st Century environment.

One hundred and eleven suggestions made. These were organized and assigned to Work Groups for further discussion. One suggestion was a reclassification study in order to bring library job descriptions and classifications up to date. A Work Group composed of representatives all of non-professional classes and each Branch level was appointed. The group worked for five months to develop a plan, which was presented as an information item to the Library Joint Powers Authority Board and all staff. SEIU, the union representing most of the workers, rejected the plan and requested that further study take place. In the Spring of 2007 The City of Santa Cruz management was unwilling to undertake a study for the Library because of the implications for other City workers. Library management has done all it can on this issue until collective bargaining negotiations are completed.

A second Work Group on Communications was appointed. Each of the recommendations from Staff Day has been implemented or is planned for implementation.

RECOMMENDATIONS

1. Worker Safety

Agree

The Library System mandates annual refresher training for all staff. An annual training report is presented the Board in September of each year.

2. Staff rotation

Agree

3. Annual budget

Agree

4. Hiring Practices

Disagree.

The Library System follows the hiring procedures mandated by the City of Santa Cruz, and has done extensive work to develop a reclassification system that includes career ladders and "job families." This matter is the subject of collective bargaining negotiations

Santa Cruz County Grand Jury



2006-2007

Final Report

Checked In: Santa Cruz City-County Library System Follow-up Review

Synopsis

The 2006-2007 Grand Jury followed up on a 2004-2005 Grand Jury review of the Santa Cruz County Library System. In addition to investigating the status of previous recommendations, the 2006-2007 Grand Jury looked into worker safety and hiring practices. The Grand Jury gathered information by interviewing upper management, most branch managers and some employees. The Jury also toured library facilities, including most of the local branches. It was discovered that some previous recommendations been appropriately addressed, while others still require attention.

Background

Prior Grand Jury Recommendations

In 2004-2005, the Santa Cruz County Grand Jury did an extensive review of the Santa Cruz City-County Library System, an investigation which resulted in the following recommendations:

- “The Santa Cruz City Manager should review the Director of Libraries’ job performance according to the Library Joint Powers Authority Agreement.”
- “Library administration should conduct an efficiency study, to find reasonable alternatives to the way staff are located within the library system and are rotated in and out of the central branch.”
- “The Joint Powers Authority Board should immediately begin to find an alternative to the crowded and inefficient location at 1543 Pacific Avenue.”
- “Since the operation of the Santa Cruz City-County Library System depends on Measure B Sales tax revenue that will expire in 2013, economy measures and new funding sources must be found to maintain existing levels of service.”
- “The library staff and Joint Powers Authority Board must develop contingency plans for the future capital projects if a bond issue is unsuccessful at the polls.”

Library System Mission Statement

“Serving County residents since 1917, the mission of the Santa Cruz Public Libraries, California is to provide materials and services which help community residents meet their personal, educational, cultural, and professional information needs. Our mandate is to provide free information services to all residents of Santa Cruz, Scotts Valley, Capitola, and the County's unincorporated areas.

We do this through a system of branch libraries stretching from La Selva Beach to Boulder Creek, via an Outreach Program serving those unable to get to a library, through

telephone reference services, dial-up access to our computer catalog, and other electronic databases. Our collections are linked by an automation system which tells where any System book or other item is located and whether it is available for checkout.”¹

Library System-Branches-Current and Planned

The following table represents the current status of the branches as of April 2007, and identifies priority projects for improvements.

BRANCH/DEPT	CURRENT FACILITY SQ FT	PLANNED FACILITY SQ FT	AVG DAILY USAGE	PRIORITY **
Aptos Branch (Tier II) *	8000	12,500	600	Deferred
Aptos Branch Parking Lot			N/A	Priority
Boulder Creek Branch (Tier I) *	7500	7,500	250	None
Branciforte Branch (Tier I)	7500	7,500	500	None
Capitola Branch (Tier I) *	4320	7,500	500	Priority
Central Branch (Tier III) *	44,000	55,000	1200	Priority
Felton Branch (Tier I) *	1,250	7,500	300	Priority
Garfield Park Branch (Tier I)	2,343	2,343	150	None
La Selva Beach Branch (Tier I)	2,200	2200	115	None
Live Oak Branch (Tier II) *	12,500	12,500	600	None
Scotts Valley Branch *	5,300	12,500	300	Priority
Pacific Ave Headquarters *	11,450	12,000	N/A	Priority
[1]	[2]	[3]	[4]	[5]

*The Grand Jury interviewed staff and toured branch.

**Priority (Capital Spending)

Definitions

Joint Powers Authority Board

The Joint Powers Authority Board (JPA Board) oversees the operations of the Santa Cruz County Library systems, setting policies and exercising responsibilities delegated to in the Joint Powers Agreement. The JPA Board consists of nine appointed members — two from the Santa Cruz City Council; two from the Santa Cruz County Board of Supervisors; one each from the Capitola and Scotts Valley City Councils; and three at-large citizens appointed by majority vote of the Board representing the geographic diversity of the area.

Lock Box

A secured locked box which contains emergency procedures and keys.

¹ Library Mission Statement, <http://www.santacruzpl.org/libraryadmin/libmiss.shtml>

Tier I Branches

The smaller neighborhood libraries that have neither the space nor the resources to provide complete information services to their communities. Instead, a Tier I provides a popular materials collection, meets the ready reference needs of adults, and endeavors to meet the library information needs of children through the junior high level.

Tier II Branches

Larger branches, serving regional populations. They have bigger collections, provide more reference services, and endeavor to meet the information needs of youngsters through the high school level. The service area of a Tier II branch usually encompasses Tier I branches as well.

Tier III Branch

The single Tier III branch is the Central Branch in downtown Santa Cruz. It serves as system headquarters for the collections, reference and youth services, and has special collections such as local history, California, and genealogy.

Scope

Follow up on Previous Investigation

1. Verified that the change in the job performance review process for the director of libraries is an operational procedure.
2. Verified that the procedure of branch staff rotation is a viable procedure.
3. Investigated if alternatives to the 1543 Pacific Avenue facility were identified, as agreed.
4. Investigated the long-range facility plan to determine if the plan is on track.
5. Verified that a funding process is in place and determined if a financial plan was in place for FY2005-FY2006.
6. Investigated the status of contingency plans for any future capital projects, if a bond issue is unsuccessful at the polls.

Additional Investigation

7. Reviewed the hiring practices for the library.
8. Investigated the safety/worker's compensation issue and actions taken.
9. Toured most library branches to understand their operation.

Findings

1. *Director of Libraries Job Review Process:* In February of 2006, the JPA Board adopted an official procedure for appraising the performance of the director of libraries. A standard written job description, which is part of the City of Santa Cruz personnel system, has been established. It has been verified that the director of libraries' performance evaluations are now current.
2. *Staff Rotation:* Contrary to previous findings, the Grand Jury found that library staff are happy with rotation practices. The library has been practicing staff rotation for more than ten years. The Central Branch circulation and reference staff is rotated in and out of the headquarters facility on Pacific Avenue. They rotate in four-hour shifts based on established work schedules. Staff rotation is in place to:
 - Reduce injuries and stress illness.
 - Cover required workload hours on the reference desk.
 - Provide cross-training and job backup.
 - Offer job enrichment.
 - Improve staff morale.
 - Reduce staff turnover.
 - Reduce worker compensation claims.

Larger branches practice staff rotation internally while some small branches do not have enough staff to rotate. There is 'on call' staff to fill in occasionally if required. Some employees feel that the staff rotation gives most library employees a chance to work directly with customers and understand the public's needs.
3. *Alternatives to 1543 Pacific Avenue:* The Director of Libraries is aware of the urgency for having a plan in place for this location. The city manager noted that they may extend the lease on Pacific Avenue until 2013 and that more financial analysis must be done. In 2006, the director appointed a Capital Projects Priorities Subcommittee. This committee is responsible for developing a long-range facilities plan.
4. *Funding Plans:* A five-year budget plan, "Library Strategic Financial Plan" was prepared in 2006. It was developed with the following funding assumptions:
 - Sales tax revenues will increase 3% per year.
 - County Library Fund increased 7.5% in FY 2006-07 and will increase 5% each year thereafter.
 - Fees, fines and miscellaneous revenues will increase 1% per year.
 - Bequest appropriations will remain at the same level of funding.
 - The library will receive estimated carry over funds, grants, and gifts.

5. *Contingency Planning:* In 2005, the JPA Board adopted a policy that keeping branches open was the “cornerstone” of the budget process and that closing branches should not be considered in contingency planning.
6. *Worker Safety:* An outside consultant prepared a safety recommendations report for the JPA. The Director of Libraries was asked to come back with an action plan on the safety recommendations that were made. Upon review of this report entitled “Promoting Worker Safety at the Library — An Action Plan,” the JPA Board accepted it unanimously. In addition:
 - The library added a “Safe/Ergonomic Practices” section to the standard employee appraisal form to raise the safety awareness of the employees.
 - The library has a safety committee which issues an annual report and periodic updates.
 - According to management, training the staff in ergonomics has reduced the workers compensation claims. Most work-groups have someone in charge of stretch breaks where three or more people use the same circulation desk.
7. *Hiring Practices:* The library does considerable hiring from outside the county library system for higher-level positions. This practice has caused morale problems and has increased costs to the system. Many of the current staff have attended college to get their Masters in Library Science with the sole purpose of advancing their careers but have not found it helpful in getting promoted.

Other Hiring Practice Issues:

- The practice of hiring half-time employees enables the library to stay open more hours to serve the public. It also has some cost-savings benefits. Many of the branches are understaffed, based on the number of customers they serve. However, hiring half-time employees also limits opportunities for full-time staff to be promoted.
 - The branches would like to have more frequent staff meetings, but find it hard to balance this need with the priority of keeping the library open for the public.
 - In April 2006, the library had a meeting for all staff system-wide. The focus of this meeting was on the Central Branch. As a result of the meeting, work groups were formed to address issues. In December 2006, a summary report was sent to all staff system-wide. The employees reported that there was not adequate follow-up in the areas of communication and the update of job classifications. Library employees sometimes stay with their jobs because they like the Santa Cruz community and wish to make a career and home here, not because they feel there are equitable hiring practices or opportunities for job advancement.
8. *Branch Findings:* In at least one branch, emergency lock boxes were not easily accessible.

Conclusions

1. The previous recommendation that the Santa Cruz City Manager review the Director of Libraries' job performance according to the Library Joint Powers Authority Agreement has been met. The Director of Libraries' Job Review Process is in place and operational.
2. In contrast to the previous Grand Jury's recommendations, staff rotation is now a viable process. Staff does not work more than four hours at a time on the reference desk, which relieves stress caused by repetitive work.
3. The recommendation that the JPA Board should immediately begin to find an alternative to the Pacific Avenue facility has not yet been met. Alternatives to this location have yet to be identified. Although the JPA Subcommittee on Capital Project Priorities has produced a plan for capital spending, the plan is very broad and does not provide enough detail for the JPA Board to make a funding decision.
4. While funding plans are in place in the form of a five-year strategic financial plan, new sources of funding have yet to be identified.
5. Contingency planning has not been addressed. In the event of reduced funding, there is no contingency plan in place. Although keeping branches open has been declared as a core service and may be desirable, this policy does not provide for the possibility of reduced funding.
6. The Director of Libraries' emphasis on worker safety and ergonomics and the on-going rotation of staff have had a positive effect on workers' compensation claims and employee morale.
7. Employees are aware of the Safety and Ergonomics Plan, but follow-up training has been overlooked and needs to be addressed.
8. The hiring practices of the library are in dire need of reform. The practice of hiring outside the local library system for the higher-level positions has caused low morale and poor expectations of job advancement.
9. During an emergency, staff at one location could not easily access the lock box key or operate it.

Recommendations

1. *Worker safety* (including ergonomics training), should continue to be a priority. Additional emphasis should be placed on annual refresher courses. An annual training report reviewed and approved by the JPA Board would help ensure the on-going improvement of the program.
2. *Staff rotation*: Because staff rotation is a viable process which has had a positive effect on employee safety, the staff rotation process should be continued.
3. *Annual budget*: The annual budget process is in place and should be continued.

4. *Hiring practices:* The library's hiring practices should undergo a complete review to determine whether reform is required. If employees felt that there was a career path with the Santa Cruz Library System, morale would improve and good employees would stay. A policy should be put in place which encourages internal employee advancement and incorporates methods such as career and succession planning. Career ladders or job families should be established so that employees can advance "in position" as their levels of expertise increase. Also, library job classifications should be updated.
5. *Capital spending plan:* The JPA Board should identify alternatives to the continued use of the 1543 Pacific Avenue facility. The JPA Subcommittee on Capital Project Priorities should prepare a more detailed plan for capital spending which would help them make an informed decision on future facility needs. For major projects, they should do a detailed financial analysis which discloses all costs, time to execute and return on investment.
6. *Contingency funding:* A contingency funding plan needs to be put in place in the event of a worst-case scenario, such as a bond measure not passing or the revenues from sales tax not increasing.
7. *Emergency procedures:* Branch managers need to review emergency response procedures and verify that all information, materials and equipment are up to date, functioning and accessible.

Commendation

The Joint Powers Authority, City Manager and Director of Libraries are to be commended for establishing current procedures for the job performance review of the Director of Libraries.

Responses Required

Entity	Findings	Recommendations	Respond Within
JPA Board	1, 3-7	1-4	90 Days October 1, 2007
Director of Libraries	1-8	1-5	90 Days October 1, 2007
Santa Cruz City	1, 3-7	1-4	90 Days October 1, 2007

2006-2007 Santa Cruz County Grand Jury Final Report

Sources

Web Sites

- Library
<http://www.santacruzpl.org/>
- Santa Cruz City Manager
citymgr@ci.santa-cruz.ca.us
- The Santa Cruz Library System Facilities Master Plan FY 2001-02 – FY2005/06.
<http://www.santacruzpl.org/libraryadmin/ljpb/members.shtml>
- 2004-2005 Civil Grand Jury Report, “Ready to Check Out? Santa Cruz City County Library System.”
http://www.co.santa-cruz.ca.us/grandjury/GJ2005_responses/
- Joint Powers Agreement
<http://www.santacruzpl.org/libraryadmin/ljpb/index.shtml>

Reports & Memos

- City of Santa Cruz Director of Libraries Job Description
- Joint Powers Authority Memo, January 17, 2006, Director of Libraries Job Description Approval
- Promoting Worker Safety at the Library, An Action Plan, Report, August 2004
- Joint Powers Authority Memo, May 23, 2005, Update on Library Worker Safety Activities
- Santa Cruz Public Library Safety Committee Annual Report 2005-06
- Joint Powers Authority Board Subcommittee on Capital Project Priorities, Report March 28, 2006
- Ready to Check-Out? Santa Cruz City-County Library System 2004-2005
- Memo: All Staff System-wide, Staff Morning Follow-up. December 26, 2006

Board minutes

- Library Joint Powers Board Minutes June 7, 2004 – December 31, 2005
- Library Joint Powers Board Minutes January 9, 2006 – June 5, 2006