



SANTA CRUZ • PUBLIC
LIBRARIES
A City-County System

LIBRARY JOINT POWERS AUTHORITY BOARD

Monday, February 1, 2010
Central Branch Community Meeting Room
224 Church Street, Santa Cruz

7:00 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA
3. APPROVE MINUTES OF JANUARY 11, 2010
4. ORAL COMMUNICATIONS
5. CONSENT AGENDA
6. WRITTEN COMMUNICATIONS
 - A. Letter and Email Correspondence From & To the Public
 - B. Articles on Libraries Nation Wide
 - C. Articles About Santa Cruz and California Libraries
 - D. Monthly narrative report
 - E. Monthly statistical report
7. REPORTS OF ADVISORY BODIES
 - A. Friends of the Santa Cruz Libraries, Inc.
 - B. Finance Committee Minutes and Oral Report
8. MEMBER REPORTS
 - A. Scotts Valley Report (Reed)
 - B. Capitola Report (Storey)
9. STAFF REPORTS
 - A. Monthly Financial Reports

Library Headquarters and System Services
117 Union Street • Santa Cruz, California 95060 • (831) 420-5600

- B. Budget projections Update (oral)
- C. 10/11 Budget Update: Schedule and Considerations
- D. Security System Proposal
- E. By-laws Review (oral)

10. OTHER BUSINESS

- A. Parking Lot List Review
- B. Strategic Plan Update (oral)
- C. Board Evaluation Update (oral)
- D. Local Taxpayer, Public Safety, and Transportation Protection Act of 2010

11. NEXT MEETING

The next scheduled meeting is Monday, March 1, 2010.

12. ADJOURN

The Library Joint Powers Authority Board will adjourn from the regularly scheduled meeting of February 1, 2010 to the next regularly scheduled public meeting on March 1, 2010 at 7 pm in the Community Meeting Room of the Central Branch Library.

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

SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD

MINUTES

January 11, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

7:00 PM PUBLIC MEETING

I. ROLL CALL

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

Staff: Teresa Landers, Director of Libraries

II. APPROVAL OF MEETING AGENDA OF JANUARY 11, 2010

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the agenda of January 11, 2010.

UNAN

III. APPROVE MINUTES OF DECEMBER 7, 2009

Councilmember Rotkin moved, seconded by Councilmember Beiers

**that the Board approve the minutes of December 7, 2009 with the following change:
Item III the motion was seconded by Citizenmember Poitinger.**

UNAN

VI. ORAL COMMUNICATIONS

None

VII. WRITTEN COMMUNICATION

A. Auditor's Report & Presentation

Steve Larson and Gabriel Tang from Caporicci & Larson made a presentation to the board on the library's audit.

Councilmember Rotkin moved, seconded by Supervisor Leopold

that the Library Joint Powers Board accept the Santa Cruz Public Libraries Basic Financial Statements and Independent Auditors' Report for the year ended June 30, 2009 prepared by Caporicci & Larson, Certified Public Accountants.

UNAN

- B. Letter and Email Correspondence From & To the Public
- C. Articles on Libraries Nation Wide
- D. Articles About Santa Cruz and California Libraries
- E. Monthly Narrative Report
- F. Monthly Statistical Report

VIII. REPORTS OF ADVISORY BODIES

A. Friends of the Santa Cruz Libraries, Inc.

Glenda Hastings reported the following Friends' activities:

- New Friends' Bookstore in Central Branch Lobby
 - *Grand Opening in February or March
- Ron D'Alessandro is working with Nancy Gerdt on patron surveys during January & February
- Friends' will be working with the Library's new job descriptions and placing volunteers where needs exist
- Boulder Creek Chapter
 - *2nd Annual Boulder Creek Library Jam on 2/27
 - *Boulder Creek Branch 25th Anniversary in February
 - *Activist Juan Negret is organizing a multi-branch "shred-a-thon" fundraiser

Teal Messer, Friends of the Board, commented on the new Friends Bookstore in the Central Branch Lobby. The new bookstore has 50% more linear feet and commands a larger presence in the lobby. The new bookstore has also allowed the Friends' office space to expand. The Friends did pay for this project contrary to the report made by the Sentinel newspaper. There has been positive patron feedback and the Friends are seeing an increase in business in the first week.

B. Finance Committee

Citizenmember Gorson reported that the Finance Sub Committee did not meet in the month of December. The sub committee did meet on January 4, 2010 and provided input to the Director and the Finance Director.

VIII. MEMBER REPORTS

A. Scotts Valley Report

No report

B. Capitola Report

Councilmember Storey reiterated that two potential sites have been identified for the new Capitola Branch Library. The first is the current site and the second is the Rispin location across the street. The Capitola City Council will be setting up a committee of citizen members to explore the two locations, begin the design process and look at funding options. At the council meeting on January 14th each councilmember will be appointing a citizen member to the committee.

IX. STAFF REPORTS

A. Monthly Financial Reports

Finance Director, Jack Dilles and the Library Director reported on the current financial status of the library. Sales tax revenue is running slightly behind projections. Revenues from fines and fees are also running behind.

B. Follow Up to Finance 101 Requests

All requests have been taken care of and followed up on.

C. Budget Projections Assumptions

Director presented budget assumptions to the Board.

Jeff Huddleston, member of the public, spoke to the board about being conservative in their budget projections for the next five years.

D. Volunteer Policy

Supervisor Stone moved, seconded by Citizenmember Poitinger

that the Library Joint Powers Board approve the volunteer policy as written with the following changes:

1st Sentence of 1st Paragraph- The Santa Cruz Public Libraries recognize the important role volunteers play in the operation of the Library System.

#3 (Added) The Friends of the Library recruit, screen and in consultation with the library place all Library volunteers. This includes responsibility for obtaining background checks in accordance with state law for volunteers working with children and other at risk populations.

#9 (Added) Library volunteers will work when appropriate supervision is available.

UNAN

E. La Selva Beach Volunteer/Staff Hybrid Proposal

Councilmember Rotkin moved, seconded by Supervisor Leopold

that the Library Joint Powers Board approve the La Selva Beach Pilot Project with the following addition:

***Library Management will investigate the number of volunteers needed to be trained at any one particular time**

UNAN

F. Budget transfer from Whalen Trust for Felton Costs

Councilmember Rotkin moved, seconded by Supervisor Stone

that the Library Joint Powers Board authorize the transfer of \$3,700 from the Whalen Trust to cover the current expenditure over the budget appropriation.

UNAN

G. Staff In Service Day

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Library Joint Powers Board authorize staff to close for a day for a Staff In Service Day and give the public plenty of notice.

UNAN

H. Lost Rate Data

Will be part of a larger report at a later date.

X. OTHER BUSINESS

A. Parking Lot List Review

Board reviewed parking lot list.

B. Strategic Plan Update

The Library Director reported on the strategic plan. The last of the branch town hall meetings was held in Scotts Valley. Several focus groups will be held this month including the homeless, seniors and the ladies of Bonny Doon. January 21st there will be a bilingual town hall meeting from 7-9PM at Beach Flats Community Center . A community survey will begin in January and will run for four weeks. In February the Strategic Planning Committee will start crafting a strategic plan recommendation to present to the Board.

C. Reappoint Citizenmember Gerdt

Supervisor Stone moved, seconded by Councilmember Rotkin

that the Library Joint Powers Board reappoint Citizenmember Gerdt to another 4 year term on the Library Joint Powers Authority Board.

UNAN

D. Election of Officers

Citizenmember Poitinger moved, seconded by Councilmember Beiers

that the Library Joint Powers Board elected Citizenmember Gorson as Board Chair.

UNAN

Citizenmember Gerdt moved, seconded by Supervisor Leopold

that the Library Joint Powers Board elected Citizenmember Poitinger as Board Vice Chair.

UNAN

E. Board Meeting Schedule 2010

Supervisor Stone moved, seconded by Councilmember Beiers

that the Library Joint Powers Board authorize the rescheduling of the following Board meeting dates:

July 5 move to July 12

September 6 move to September 13

UNAN

F. Board Evaluation Update

Citizenmember Gorson presented the Board with Performance Improvement Actions Recommendations which included:

- *Completing a CALTAC Board Effectiveness training
- *Enact a policy for a disciplined and effective planning process, including long and short term strategies and goals as well as financial and capital planning.
- *Set budget priorities

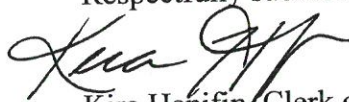
XI. NEXT MEETING

February 1, 2009

XII. ADJOURN

The regular meeting adjourned at 9:20 p.m.

Respectfully submitted,



Kira Henifin, Clerk of the Board

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

TRANSFORMING OUR Image THROUGH WORDS THAT WORK

PERCEPTION IS EVERYTHING

VALERIE J. GROSS is CEO, Howard County (Md.) Library; valerie.gross@hclibrary.org. She is reading *Three Cups of Tea: One Man's Mission to Promote Peace . . . One School at a Time* by Greg Mortenson and David Oliver Relin.

Like many of you, I represent my library system out in the community. As part of the board of directors for Leadership Howard County (Md.), I attended a retreat last fall where we were asked to introduce the person sitting next to us, and include something about their work. When Jody, my assigned instructor, asked me, "What does your organization do?" I said, "We deliver equal opportunity in education—for everyone in Howard County." Impressed, Jody spoke slowly, "Wow . . . I thought you were going to say you loan books."

Seizing the opportunity, I continued, "Yes, we loan books! That's the Self-Directed Education pillar of our educational mission. The second pillar is Research Assistance and Instruction—for individuals and groups, the third being Instructive and Enlightening Experiences—the community and cultural concepts."

Jody's respect for public libraries increased on the spot. When she introduced me, she repeated my exact words, flooring the twenty-five movers and shakers who, like Jody, had never thought that everything public libraries do is what the world values most.

Now this group holds us in a much higher regard, although they may not know why—but we do! It's a direct result of the perception created through carefully selected terms—*words that work*.

Perceived Value

While there's no question that our first-rate collections, e-resources, welcoming facilities, state-of-the-art technology, and outstanding customer service shape our customers' experiences, words that work engage like nothing else. It's what causes people—even if they never set foot in the library—to assign our true value to our jobs, work, and profession.

At Howard County Library (HCL), we began experimenting with the philosophy in 2001. We were ecstatic to then discover *Words that Work: It's Not What You Say, It's What People Hear* by Frank Luntz, a book that explained the reasons for our—many surprising—successes (read on), and coined the phrase, "words that work."¹ Luntz's book also infused us with additional ideas.

a telephone tree or LiveJournal posting or even a blog is now a message writ large and accessible from any number of devices.

When the iPhone hit \$99 you may have heard a great and terrible keening rise up from every teenager who had lived the past two years in dire wanting. Suddenly the "Jesus phone" as some pundits called it, was budgeted to move. Sure, it's a cheapie iPod with not enough storage and the AT&T service plan has reduced me and my girlfriend to communicating via a long string and tin cans, but that's irrelevant in the face of Tweetie. Or TweetDeck or any other Twitter application that can be gotten for free, or quite close, for the iPhone. Twitter applications plus mobile broadband, plus cheap phones, plus cameras can only mean one thing . . . porn.

Well, actually a remarkable moral panic about porn is more like it. Search "sexting" on Google News. Any one of a hundred or more small-town and midmarket newspapers, TV stations, and community groups seem to be predicting the moral apocalypse thanks to camera phones and texting, giving kids the tools to become the porn moguls they always dreamed of since the dawn of pubescence.

Except, that's just not the case. The reality is that the Draconian laws passed over the past few decades by politicians, with a desire to appear ever tougher on crime, have made it possible for a girl to send a picture of herself in a swimsuit to a friend and be an unwitting interstate child pornographer.²

This is not to say that inappropriate, even exploitive, use of digital tech is not an issue. But the breathless fear mongering in the media does not dissuade or prevent such activity one bit.

How do librarians approach this? One suggestion I heard recently involved a bomb-suit made of lawyers. The ability to share information is always going to lead to the sharing of, shall we say, indelicate material. I believe after issuing the famed "Mr. Watson, come here—I want to see you," Alexander Graham Bell received a phone solicitation regarding his bedroom stamina.

Teaching online safety is one way, teaching online responsibility is another. It's a mainstay to teach young adults not to share information that might invite harm, but communicating that it's not the stranger with a windowless van that is the only concern, but rather that they are participating in something akin to a vast social experiment with unknowable consequences on a global scale. And they say science is hard to make appealing.

The digital divide of old is still there. No doubt. For every scheme and dream to populate the world with (almost) \$100 laptops and get Wi-Fi for everyone for free, there are still millions left out. Even those who can get online for free might be underserved by poor search skills, oceans of advertising, and spam. The divide for the born digital young adults though, is one

of understanding: their parents, educators, and well-intentioned librarians trying to comprehend and protect them from the wilds of territories they are mapping all on their own. ■

References

1. "Facebook 'Sparked White Flight from MySpace,'" July 2, 2009, www.news.com.au/technology/story/0,28348,25723022-5014239,00.html (accessed Aug. 20, 2009).
2. Kim Zetter, "Child Porn Laws Used Against Kids Who Photograph Themselves," *Wired*, Jan. 15, 2009, www.wired.com/threatlevel/2009/01/kids/comment-page-2 (accessed Aug. 20, 2009).

To: *Library Acquisitions Staff*
From: *LGA*

Here's a notepad I picked up at the last conference. Check out this vendor when you have a chance. Good info on their website.

They're a good source for:

- material our regular vendor can't supply*
- genealogy titles*
- videos and other things we order online*
- standing orders*

Let's try them soon!

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Full Credit For What We Do

Many of you have already achieved great success in conveying your value to the community. Regardless of how successful you have been, if I owned an island in Tahiti, I would gladly wager that your library system would experience greater perceived value and an enhanced image by employing the words that work philosophy summarized below after just six months.

I'd bet my island because the concept is incredibly effective. It's also simple and costs nothing to implement.

In a nutshell, we have immense power over our image and perceived value merely by choosing smart terminology that people understand and value—words that shape the perception we desire for our customers.

By replacing typical library terms and jargon with bold, value-enhancing words and phrases, we have the capacity to transform our image, receiving full credit for what we already do.

What is Valued Gets Funded

Receiving full credit for what we do is imperative because our funders—public entities and donors—invest mostly in what they *perceive* to be valuable.

To illustrate the concept, consider Evian bottled water. If you have ever purchased Evian, you likely know that a bottle costs three times as much as generic brands.

Why does Evian command a premium price? The reason has little to do with taste. Customers pay more for Evian because they assign greater value to it. They perceive it as higher quality.

If it's not taste, how does the company accomplish this feat? By shaping its image with words, such as *from the French Alps*, *detox with Evian*, *rejuvenation*, and *purity*. Desiring to detox and rejuvenate, customers invest.

What can libraries learn from Evian? That:

- Through the language we use, we have the power—without changing anything we do—to transform our image, receiving full credit for our work, which means greater respect, enhanced value, and, above all, increased funding.
- The secret to becoming the Evian of public libraries is as simple as recognizing that it's not only what we do and how we do it, but how we talk about what we do that commands the value we deserve.

The Power of Words

Note your response if I say to you, "I'm going to give you a *nutritious* snack." Now consider your response if I say, "I'm going to give you a *delicious* snack."

You likely wrinkled your nose at *nutritious* while *delicious* beckoned you to come and get it—two different responses to the very same snack.²

Similarly, gauge your responses to these two questions:

- Which do you value more? A *used car* or a *certified, pre-owned vehicle*?³
- Which do you support more? *Drilling for oil* or *careful exploration of energy*?⁴

These examples show that the words we choose can elicit differing responses to the same thing.

So the point is, let's use terminology that shapes the views we want in our customers!

Words that Completely Changed an Industry's Image

Before we consider powerful terminology for libraries, let's analyze two final Luntz examples of industries that transformed their images with single words:

1. **Liquors to Spirits.** To move away from an image of fortified wine, drunks, and alcoholism, the liquor industry transformed itself by replacing the word *liquor* with *spirits*. The result? Customers now associate the industry with sophistication, where champagne and wine glasses are raised to celebrate in style.⁵
2. **Gambling to Gaming.** What brilliant ploy did the gaming industry employ to achieve its revolutionary image transformation? Gone are the *gambling* days that brought to mind pawn shops, addiction, and destroyed families. The industry moved to the term *gaming*, which conveys fun, choice, and family vacations! Only the term changed—nothing else: the same cards, the same dice, the same casino advantage. The transformation occurs as the result of "one single, solitary word."⁶

The Strongest Word That Works: Education

Like the spirits and gaming industries, we have the capacity to completely transform our image with a single word that is universally valued: *education*.

While recent discussions in our profession suggest public libraries play *an* educational role,⁷ the transformation opportunity described herein involves positioning all that we do under education. Our business is education—equal opportunity in education for everyone.

In 2001, HCL embarked on a vision to align all program components with education. We began by connecting the library with the commonly understood definition of education by launching A+ Partners in Education, a comprehensive partnership with our schools, built on a vision of providing students with the best possible chance of overall academic success.⁸

Key partnership components include:

- HCL assigning a designated library branch and liaison to each and every school;
- all new students receiving library cards through school registration;
- HCL instructors teaching curriculum enhancement classes at the schools and in the branches;
- teachers submitting assignment alerts to HCL staff; and
- kindergarten field trips to HCL incorporated into the school's curriculum.

To keep the partnership visible, we hold an annual A+ Celebration, which draws a standing-room-only crowd, to highlight the past year's successes and future goals, and distribute an A+ Annual Report.⁹

Many library systems across the country work closely with schools, so as a profession, we have progressed in linking public libraries to the commonly understood definition of education, which serves as the launching point to now connect all we do with education.

Education Definition Expanded

Once the A+ Partnership was firmly established, we began expanding the education vision to our entire program, positioning all that we do under the complete definition of education, which includes:

- the activities of educating or instructing or teaching;
- information about a subject matter;
- knowledge acquired by learning;
- activities that impart knowledge;
- the process of acquiring knowledge; and
- an enlightening experience.

The Three Pillars

Our educational role is best illustrated by the image of an educational canopy, supported by three pillars that comprise our overall educational mission (see figure 1):

1. **Self-Directed Education** through our collection—from board books to large-print titles—available in print and online.
2. **Research Assistance and Instruction** for individuals and groups. This pillar includes classes, seminars, and workshops taught by library instructors.
3. **Instructive and Enlightening Experiences** through cultural and community center concepts, events, and partnerships.

Lifelong Learning versus Lifelong Education

While *lifelong learning* does not conjure up a bad image, consider replacing the commonly heard phrase with a stronger version: *lifelong education*.

Consider that one does not hear governors say, "I'm cutting everything except learning." What one does hear from nearly every elected official is, "My highest priority is education."

Similarly, although terms such as *knowledge* and *community center* are strong, they are even stronger when connected in the same sentence with education, as one of the educational pillars.

Yes, but what about fiction?

Workshop participants in San Bernardino wondered whether fiction books and "entertainment" DVDs fall under the category of education; they quickly reached a consensus that fiction, in and of itself, is educational. (*Editor's note:* The author presents workshops on the topic of "words that work" at library events across the country, however they are not professionally affiliated with Luntz.)

Further, the borrowing of books and DVDs for school assignments is clearly education, such as when high school students read Isaac Asimov's book *I, Robot*, watch the movie, then compare the two. Following this reasoning, an adult's reading or viewing of *I, Robot* with no required school assignment is also education. Each of these functions falls under clauses two through five of the definition of education as previously noted, and in the first and third pillars of the "Public Libraries = Education" concept.

As a side note, at HCL, we call our entertainment DVDs *fiction* DVDs, as we do fiction books. Why? Applying the words that work principle, we believe

that elected officials looking for budget areas to cut will be more likely to cut entertainment DVDs from the library's collection, as opposed to cutting materials from our self-directed education pillar that includes "fiction and nonfiction materials in all formats." It's a matter of perception.

Aligning Ourselves with Education—Suggested Phrases

Transforming our image by aligning all that we do with education requires that we modify the manner in which we speak about ourselves. Consider using the following phrases to describe your public library (substitute your state, county, or city):

- We are a major component of Maryland's strong educational system.
- We are a pillar of education.
- We are educators.
- We are partners in education.
- We provide equal access to quality education, regardless of age, background, or means.
- We deliver equal opportunity in education—for literally everyone.

These phrases convey what we do in terms our customers value.

Why Education?

The main benefit of aligning ourselves with education is perceived value. Contrast the views of these two elected officials:

- Bridgeport (Conn.) Mayor Bill Finch: "We are getting back to basics: police, fire, and education. We will not try to be all things to all people. Libraries are not essential services."¹⁰
- Howard County Executive Ken Ulman: "We are continuing our dedication to quality education. Education is the engine which drives our quality of life. We are fortunate to have a public school system, library system, and community college which are all nationally recognized, but these institutions cannot continue to thrive without strong support from the county . . . I am proud that my budget reflects the high priority I place on education."¹¹

Ulman has been hearing and reading that HCL is education for eight years—first as a county council member and currently as county executive. He now

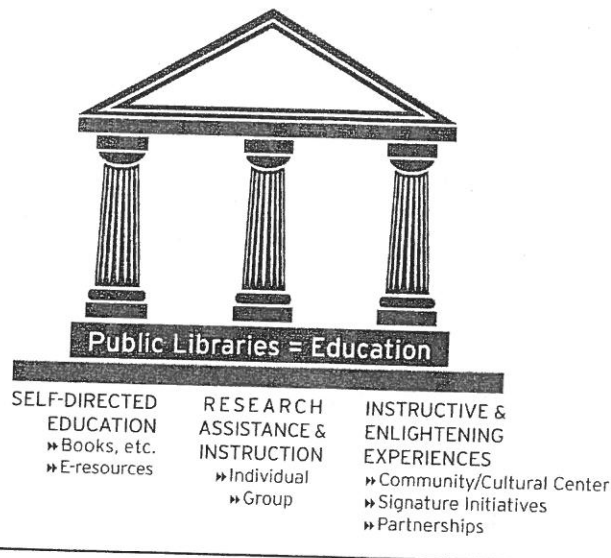


Figure 1. Three pillars that comprise our overall educational mission.

speaks in these terms, regularly crediting us as a major contributor to education, the driving force of the county's award-winning quality of life (*Money* magazine ranks Howard County as one of the top ten most desirable places to live in America¹²).

Another example of greater perceived value is a feature that appeared in the Baltimore-region publication, *Corridor Inc.* A writer for the magazine interviewed Ulman and three other newly elected county executives. One of the questions posed was, "What's the number one attribute of your county?" While Ulman's counterparts answered "its beauty" and "the whole community spirit," what was the first thing Ulman mentioned? The library system!¹³

A final example: Ulman moved HCL from the community services section in the county's operating and capital budgets to the education section, along with the school system and the community college. Why is this important? Above all, it is the symbolism. Education—viewed as vital and indispensable—drives economic development and quality of life, and the library is now visibly one of education's three major components: the school system, the community college, and the public library.

In addition to aligning ourselves with education locally, we can use the same strategy to convey our true value at the state and national levels. In his inauguration speech, President Barack Obama said, "And we will transform our schools and colleges and universities to meet the demands of a new age." Will

public libraries be included next time? Yes, if we move from the nebulous *we help people and we do good work to we deliver equal opportunity in education.*

Other Words that Work for Libraries What Does Storytime Mean?

Several years back, we came across a newspaper article describing a Kindermusik class developed for Howard Community College.¹⁴

Nearly identical to HCL's Play Partners program for infants and toddlers, the class involved stories, music, rattles, and songs—and abundant social interaction.

What was the difference? There were three: (1) it was called a *class* (as opposed to our *storytime*), (2) it was *taught* by a *teacher* (compared to being *presented* by a *programmer*), and (3) it cost \$225 for a fourteen-week session (whereas our admission is free).

Other terms in the article caught our eye, such as that the class teaches “cognitive, physical, social, musical, and language skills,” and “teaches them to be expressive and creative in the thought process.”¹⁵

We began analyzing what *storytime* conveys to someone who has no idea what we do. When asked the question, workshop participants answered “play,” “babysitting,” and “recreation”—all misperceptions that trivialize the educational value and staff member expertise that is involved.

To receive full credit for what we do at HCL, we now say the following:

- **Preschool Classes.** The library's preschool classes teach creative expression, social skills, listening comprehension, and the foundations of reading through letter and number recognition and vocabulary building.
- **K-5 Classes.** Kindergarten through fifth grade classes teach subjects—including math and science—through children's literature and creative expression, as well as cognitive, social, and communication skills.

Although the majority of staff members immediately see the merits of migrating to the new terminology, others are a bit nostalgic. One workshop participant in San Jose lamented, “But I like storytime!”

There's nothing wrong with saying *storytime*. Just know that, to the public, the term conveys less value than *class*.

Those who do not know what takes place in storytime will not assign the deserved value to the class, or to the talented instructors required to teach it. What it comes down to is the Evian strategy.

If you find yourself in the nostalgic camp, put yourself in the shoes of your county executive (or mayor, governor, or a taxpayer voting on a tax increase) then ask yourself which you would fund more generously—or cut less—*storytime* or *children's classes that teach the foundations of reading?*

While old habits die hard, even the press and our customers are now beginning to call what we used to refer to as storytime *children's classes*.

It is also important to note that, although we now say *children's classes*, the class content, or *curriculum*, stayed exactly the same!

Beer Appreciation and Happy Hair

Likewise, what do the terms *program*, *programmer*, and *programming* mean to the non-library person?

Once again, we can learn from our community college colleagues in our quest for words that work in this area. Their lineup of non-credit classes includes “Beer Appreciation,” “English Afternoon Tea,” “Juggling,” “Creative Gift Wrapping,” and my personal favorite, “Happy Hair.”

The difference between these classes and what we offer the community? As with “storytimes,” it's terminology and cost.

What they call *classes taught by instructors* who develop *class curriculum*, we refer to as *programs presented by programmers* who *do programming*. Also, they charge \$65 per class and we don't.

Titles That Work

Have you ever heard “I'd love to work in a library so I could read books all day!” We know this is far from reality, but that's the perception for someone who is not a library connoisseur. We also know that our salaries typically do not reflect our value.

In his March 2007 *Information Today* column, K. Matthew Dames writes, “There are librarians doing library work, and they are compensated well,” emphasizing, “They just don't call themselves librarians.” Dames suggests *information architect* and *knowledge manager* as possibilities for title replacements that command more respect, and therefore greater associated value.¹⁶

Dames' thoughts, combined with our words that work efforts, prompted title modifications at HCL. Desiring to address both misperception and inad-

equate value associated with our roles, we now call librarians and library associates *information specialists* and *instructors*.

Instructor is immediately understood. Our instructors enjoy their new titles because people now understand and value what they do. No one asks anymore whether they read books all day.

For similar reasons, we now call circulation clerks *customer service specialists* who work in our *customer service department*. *Circulation* to most people relates to health matters. By contrast, everyone understands customer service.

As to my new title, which had been director, the HCL Board of Trustees changed it to CEO for two reasons. The first was that a modified title would enable me to then call the "head of" positions (e.g., head of human resources) what their counterparts are called in business and academic spheres: director of human resources, director of public relations, and so on.

The second was perception of what I do. Prior to the change, when I introduced myself as director, the conversation would continue, "Oh, which department?" While my response ("Oh, I dabble a bit in all of them.") served to clarify, now my title is self-explanatory, highlighting the role's business aspects.

Teacher with a Lowercase "t"

While *instructor* was readily embraced by workshop participants, *teach* and *teacher* generated greater discussion. While some noted that library staff members are not certified, and therefore not teachers, others countered that not only are we teachers with a lowercase "t," but also that teachers in private schools and professors at colleges and universities are not necessarily certified. Like us, they are simply experts in their fields. In addition, many professions, such as personal trainers who teach exercise classes, are experts referred to as instructors and teachers.

At a Maryland Association of Public Library Administrators conference last year, one attendee commented that adjunct faculty members who teach non-credit community college classes hold no particular standardized credentials, with knowledge of the subject matter being the hiring requirement.

At HCL, we have experienced greater respect for our staff since

we switched from programmer to *instructor*. One of our goals with A+ Partners in Education is that students in K-12 view HCL staff as adjunct faculty. We know we are beginning to reach our goal when children call us their *library teachers* and say the favorite part of their day is *library school*.

Educators

In addition to referring to our HCL staff as teachers and instructors, we are now working toward calling ourselves *educators*. We find that when we do so, the general public assigns greater value to all that we do (we even won Educator of the Year—read on).

Some of you are already calling yourselves educators. For instance, after confessing in his *Information Today* column that he gave away his secret on how to land the coveted first-in-line spot on Southwest Airlines flights, Steven M. Cohen added, "Of course, I told them how. After all, I'm an educator."¹⁷

How Much Do You Charge?

At HCL, we now say that our *instructors develop curriculum and class content and teach classes, seminars, and workshops* for children and adults on a wide variety of topics.

I described our classes, seminars, and workshops with this terminology for a Rotary Club presentation. The club members were mesmerized. At the end, a hand shot up with the question, "How much do you charge?" My answer? "No charge! Your taxes, well invested."

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A Good Start

Although most public libraries still call classes *programs*, the terms *classes*, *seminars*, and *workshops* are beginning to surface. For example, the Morris County (N.J.) Public Library and Chicago Public Library assign value-added terms to their initiatives for adults, such as *classes*, *seminars*, *workshops*, and *events*. Many more libraries do as well, and it is likely that some are beginning to substitute *children's classes* for *storytime*, and *programs* and *instructors* for *programmers*.

If you haven't already, consider taking the plunge. You'll be surprised at the added value that will immediately be assigned by the listener, just by changing some words.

Ten Rules

To improve the effectiveness of our communication, in addition to incorporating value-enhanced terminology, Luntz sets forth "The Ten Rules of Effective Communication."¹⁸ If you incorporate even some of these concepts into a presentation or writing piece, your message will be more effective. The rules are:

1. *Simplicity*—use small words.
2. *Brevity*—use short sentences.
3. *Credibility* is as important as *philosophy*.
4. *Consistency* matters.
5. Offer *something new*.
6. *Sound* and *texture* matter.
7. Speak *aspirationally*.
8. *Visualize*.
9. Ask a *question*.
10. Provide *context* and explain *relevance*.

Do consider reading Luntz's explanation of all ten rules. We can benefit from them all—especially rule 7, "speak aspirationally," as ours is a profession that tends to have a "woe is me" outlook. Because most people do not like negativity, we are, in essence, sealing our own fate. Let's reverse the trend!

Seven Phrases to Lose from Our Lexicon

Open almost any library journal and you'll see something relating to our being undervalued and underappreciated. Words that work, combined with *speaking aspirationally* is far more effective, as the tactic teaches our audience value in an optimistic fashion—and everyone loves optimism.

To copy late comedian George Carlin's famous "seven words you can't say on TV," let's agree as a profession to never again say the phrases:

- We must remain relevant.
- Our future is uncertain.
- Nobody values our jobs.
- No one knows what we do.
- People think the public library has no value.
- The library's relevance is shrinking.
- We might be extinct in twenty years.

Let's strike negativity from our lexicon, replacing pessimism with positive, upbeat, and optimistic assertions.

The strong terminology included here, as well as the weak-versus-strong list that follows, can assist you with creating new, optimistic replacement statements. For instance, instead of saying, "We must remain relevant," how about asserting, "As a major component of education, we continually aspire to reach new heights."

Focus on Results, Not Process

Luntz also describes the greater effectiveness of focusing on results, rather than process. For instance, in a survey he conducted, 51 percent of responses favored raising taxes for *law enforcement* compared to 68 percent in favor of higher taxes to *halt the rise in crime rate*.¹⁹

In the library world, we too can enhance value by focusing on results. To illustrate, many of us like to say that we *promote the love of reading*. While not a bad phrase, a stronger statement would combine the phrase with the results of *increased reading*, *improved academic achievement*, *economic advancement*, or *enhanced quality of life*.

The most effective elevator speeches focus on results. A succinct one you might consider using is: Who are we? We are partners in education. What do we do? We deliver equal access to quality education for all, regardless of age, background, or means. Why does it matter? Because education drives economic advancement, enhancing quality of life.

Strong, Intuitive Value-Enhanced Terminology

The typical library terms (see table 1) that tend to trivialize our value were transformed by workshop participants into stronger, value-enhanced, intuitive words and phrases, applying the words that work

philosophy. Substituting the stronger terms at every opportunity, combined with a strengthened alignment with education, will begin to shape in your customers the image that you desire.

A Work in Progress

At HCL, we continue to align ourselves with education. We also continue to look for opportunities to substitute stronger, smarter words wherever possible. The latest substitution occurred while reviewing a monthly statistics report. We considered the effect of substituting *research assistance* for the *information questions* category. If you were a county executive, mayor, or governor, which would you be more likely to fund? We decided to make the edit.

Results

To give you a sense of the effectiveness of words that work, here are sample results at HCL (population

275,000) since we began our quest to transform our image and enhance our value in 2001. By positioning the library as a major component of Howard County's strong educational system and by incorporating value-enhanced terminology that people understand:

- Visits have soared 189 percent (934,000 in FY01, compared to more than 2.7 million in FY09).
- Items borrowed have increased 83 percent (3.6 million in FY01, compared to more than 6.6 million in FY09).
- Operating budget increases have reached record levels (e.g., a 68 percent increase in seven years, with no new branches; in FY09 the increase bolstered salaries by 10.5 percent).
- Capital budget increases have surged as well (an additional planned 142,000 square feet of library building space where before it was zero).
- Friends of HCL budget has increased more than 500 percent.

Table 1. Value-Enhanced Terminology

Undervalued/Misunderstood	Stronger, Value-Enhanced, Intuitive
storytime, storytime room	children's classes, children's classroom
program	class, seminar, workshop, event, initiative, project
programmer, programming	instructor, teacher, facilitator, curriculum development, instruction
help, serve	enhance, improve, advance, increase, teach, tutor, instruct
outreach	community education, marketing
entertainment	life-enriching, fiction (as in "fiction DVDs")
recreation/leisure	life-enriching
cooperation	collaboration
do, hold, offer	teach, instruct, lead, present
information (best sometimes)	education, research (stronger)
reference interview	research needs assessment
learning	education
encourage/promote reading	increase/improve reading, improving academic success/achievement
juvenile	children's
circulation	customer service, borrowing, loan
"ready to learn" or "ready at five"	we teach the foundations of reading, social skills, and creative skills (some suggested "ready at three," etc.)
emergent literacy	childhood education
circulation clerk	customer service specialist
librarian/library associate	information specialist and instructor, research specialist and instructor, educators

- Hours of operation expanded by thirty-seven hours a week, including year-round Sunday hours at our two largest branches.
- Awarded Howard County Educator of the Year (library educators included in the pool of candidates, along with teachers, faculty members, and principals, a direct result of calling ourselves educators).
- Awarded Howard County Nonprofit Business of the Year.
- Moved from the community services section of the county's budget into the education section.
- HCL ranks first in the nation among the great public library systems.²⁰

Conclusion

Through words that work, we have the power to transform our image and to command our full value. We are education. We are indispensable. We always have been. The difference is that we will now be perceived as such—and perception is everything. ■

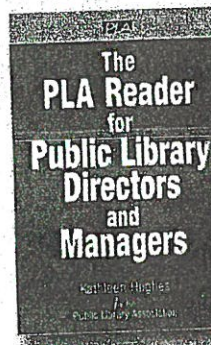
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Library adds social worker to assist homeless

Heather Knight, Chronicle Staff Writer
Monday, January 11, 2010

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There has long been an unwelcome footnote at the San Francisco Main Library in the Civic Center: homeless people who hang out among the shelves, sometimes cursing loudly or threatening others.

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The bathrooms often have proved downright scary, with people doing drugs, bathing in the sinks and having sex in the stalls. Patrons' comments collected by the library over the past couple of years include, "The Main Branch library, while well-intentioned, looks like a homeless shelter inside and out." And, "The homeless are driving me and many of my professional friends away."

In many ways, its popularity as a homeless hangout is no surprise because the library is centrally located, free, open to anyone, doesn't have security checks and has plenty of bathrooms. But the library has, well,

begun to turn the page on the problem by hiring what is believed to be the country's first full-time psychiatric social worker stationed in a public library.

In a partnership with the San Francisco Department of Public Health, the library hired Leah Esguerra a year ago this month, and she now has directed into social services more than 150 homeless people and others living on the edge in low-cost residential hotels who frequent the library.

Earning \$85,000 a year, Esguerra is on hand five days a week handling complaints from staff and patrons about people's behavior, and calling in security only if things get really ugly.

She also has trained library workers on what to do if they witness unpleasant behavior and supervises "health and safety associates" - formerly homeless people who take part in a 12-week vocational rehabilitation program and then become employed by the library.

Melvin Morris recently became the first one hired by the library to work up to 20 hours a week for \$12 an hour monitoring the restrooms to make sure they're clean and safe.

On a recent day, the 50-year-old Morris wore a white button-down shirt, black suspenders, trousers and a tie and stood outside various bathrooms handing out colorful flyers with information on where to find shelters, shower facilities, food and job training programs.

He tells people caught shaving or bathing in the sinks to move on, and summons security for more serious problems, such as hostile junkies. But usually, he simply reaches out with compassion.

"I come from the same place they come from," he said. "When I talk to them, they can't

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believe I was actually homeless. I tell them they could do it, too."

After a falling-out with his sister who'd been letting him sleep at her place, Morris was homeless for several years, sleeping on park benches and in doorways around the city. He was addicted to drugs, to "everything," he said. "I was basically a garbage can."

After an encounter with the city's Homeless Outreach Team, Morris began to turn his life around. He has reconnected with his family and has his own room in a residential hotel on Turk Street in the Tenderloin. "This is my very first place in life - my very first place I ever had to myself," he said.

In addition to those found on library shelves, stories like Morris' are the kind City Librarian Luis Herrera loves.

Herrera said that when he took the job a few years ago, staff members said their top concern was coping with out-of-control patrons. After all, they're trained librarians - not doctors or police officers or social workers. But at the same time, he said, a public library must truly be open to everybody.

"It's the most democratic institution," he said. "We absolutely want it to be open to everyone, but you cross the line and it's a behavioral issue. We're not labeling. We don't make any value judgments."

To that end, Esguerra said she tries to be sensitive to the fact that many homeless people are using the library like everybody else: to read and access the Internet.

Kathy Lawhun, chief of the main library, said, "It's really understanding and empathizing, but also setting limits and guidelines and referring people who need help."

The ongoing survey of patrons and library staffers shows fewer incidents of negative behavior like yelling at others - and for those incidents that continue, a decrease in intensity. Last summer, the comments really started to improve.

The bathrooms, one person wrote, "have changed in a good way." Another wrote in support of the new homeless services. And one particularly pleased library user offered, "Social worker made a referral that led to a job and got someone off the streets after three months."

E-mail Heather Knight at hknight@sfgchronicle.com.

This article appeared on page C - 1 of the San Francisco Chronicle



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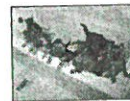


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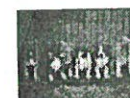
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Just curious--since homeless people do not pay taxes which support public libraries, why are they entitled to the "privilege" of using the library for any purpose, let alone having sex, doing drugs, bathing, etc.?

Recommend: (43) (17)

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studs_lonigan 1/11/2010 6:10:25 AM

Another FAILURE of Newsom. The library has become the defacto homeless day-shelter. That's quite a generous salary, for any social worker, no wonder the city is going broke.

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Library leaders brace for more tough choices

Friday closures could continue if budget doesn't improve

By **GENEVIEVE BOOKWALTER**
gbookwalter@santacruzsentinel.com

SANTA CRUZ — Rising health care costs and plummeting property tax receipts might soon take their toll on the already struggling public library system as leaders struggle to balance their budgets for the next five years and consider continuing Friday closures.

Health care costs are expected to rise 8 percent each year for the next five while property tax receipts could drop as much as 7 percent next year and then stay flat, according to projections discussed by the board Monday evening. While exact numbers were not discussed, those projec-

tions could cause additional stress for a system already strained after \$1.3 million in cuts last year.

No decisions were made Monday, but the mid-year report allows library leaders to start planning for more tough decisions in June, when the annual budget is passed.

"The purpose of the projection is to show, given the status quo, how good or bad is it going to be," said Barbara Gorson, chairwoman of the Santa Cruz Public Libraries Joint Powers Board, which governs all public libraries in the county except those in Watsonville.

The discussion was the first of many expected as the board grapples with a still-shrink-

ing \$11.3 million budget.

While the deficit is not looming as large as last year's — when the board was forced to slash both open hours and the new book budget to save \$1.3 million — revenues still are falling about 2 percent short than expected, Director Teresa Landers said.

The bleak economic forecast also raises the question of whether the system's current stop-gap measures are sustainable if the system's fiscal woes continue into the foreseeable future.

Audience member Chuck Huddlestone of Soquel recommended the board plan for no-growth over the next half decade.

"I'd look for a starvation

diet for the next five years," Huddlestone said.

The board did not discuss whether to close any of the system's 10 branches, a proposal considered last summer but panned following public outcry. That won't be revisited until the board finishes taking extensive public comment as part of the system's strategic plan, which is under way and should wrap up later this year.

Landers did say, however, that existing staff furloughs — which translate into weekly Friday closures for patrons — will likely be necessary next year, too.

"We're probably going to need to ask to continue the furlough," Landers said.

1/11/10

Library leaders see bleak year ahead

Despite massive cuts in 2009, revenue expected to fall short

By GENEVIEVE BOOKWALTER

gbookwalter@santacruzsentinel.com

SANTA CRUZ — Library leaders are gearing up for talks tonight that could lead to a fundamental shift in how the county system is run after new budget estimates show revenue continues to fall while expenses rise.

"I don't know if there's anybody who will be surprised if things get worse before they get better regarding our budget," said Jim Reed, Scotts Valley city councilman and member of the Santa Cruz Public Libraries Joint Powers Board.

That leaves board members to prioritize what services or improvements to eliminate or postpone as they continue to make ends meet on a shrinking budget. The county library system manages all public libraries in the county except in the city of Watsonville.

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SANTA CRUZ PUBLIC LIBRARIES
JOINT POWERS BOARD

WHAT: Discussion of mid-year budget forecast

WHEN: 7 p.m. today

WHERE: Central Branch community meeting room, 224 Church St., Santa Cruz

INFORMATION: www.santacruzpl.org

LIBRARY

Continued from A1

No decisions will be made during today's discussion of the system's \$11.3 million budget. But talks could set the tone for what to prioritize in coming years, library leaders said.

For example, Director Teresa Landers said, all branches have needed repairs and upgrades that have been put off, and the county system is one of the handful left in the nation that still uses antiquated check-out system with date cards and pockets on books' front pages, among

other concerns.

The bleak economic forecast also raises the question: whether the system's current stop-gap measures, which include opening some branches only three days a week and relying on the public to donate new books, are sustainable. If the system's economic woes continue into the foreseeable future, those money-saving measures were approved last year as library leaders were forced to trim more than \$1 million from the budget.

Numbers released Thursday predict sales tax revenue will stay flat through 2012 while property taxes are expected to drop 3 percent in

2011 and stay at that level the following year. Sales taxes and property taxes are the system's primary revenue sources.

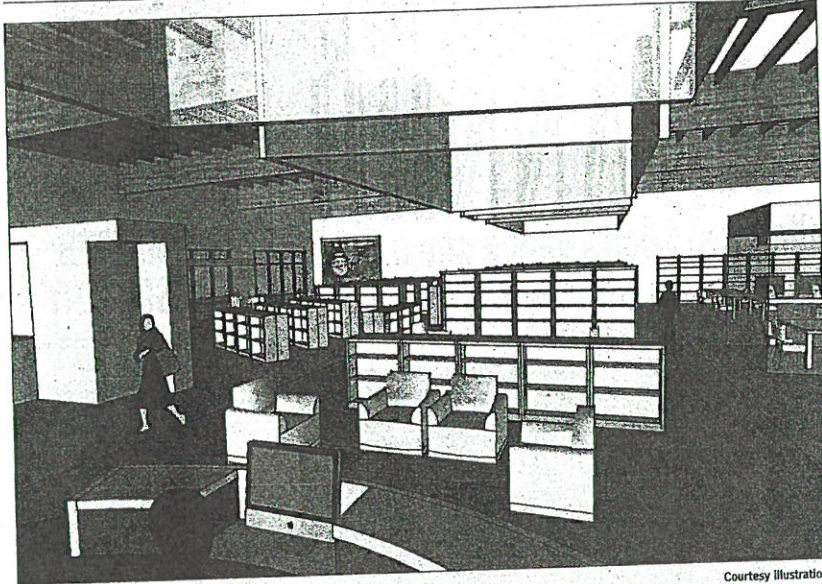
"I wish I had a definite idea of what I would push and say this is what we should do," Landers said. But with a budget this sparse, "I'm not sure there's an answer."

Landers said the board will not discuss today whether to close any of the system's 10 branches, a proposal floated last summer but rejected in the face of public opposition. That idea won't be revisited until the board finishes taking extensive public comment as part of the system's strategic plan, which is

under way and should wrap up later this year.

Board Chairwoman Barbara Gorson, who also sits on the board's finance subcommittee, said today will be the first of many tough conversations about next year's financial picture and the outlook for the next five years. The 2010-11 budget should be approved in June.

"Do we want to continue incrementally looking at revenues and expenses and trying to adjust them and make them meet?" Gorson said. "Or do we believe that there is a longer term, structural issue and we need to make longer term, structural decisions?"



Courtesy illustration

TAKING SHAPE: An interior view of what the future Scotts Valley Library could look like after the Sports Center is remodeled is shown above. Construction will likely begin in July or August 2010, and Scotts Valley hopes to open the library by spring 2011.

Plans for Scotts Valley library plow forward

By Michelle Camerlingo
Press-Banner

The Santa Cruz County library system has seen its share of turmoil in the past year — many branches have drastically scaled back hours, suffered layoffs and put off upgrades or repairs.

Last year, library leaders were forced to chop more than \$1 million from an already bare-bones budget.

In the midst of that bleakness, Scotts Valley's planned new library symbolizes a beacon of hope, as organizers set out to build a branch that meets the needs of the times, said Teresa Landers, county library director.

"I'm very hopeful, because this will be the first facility that will have 21st-century standards, which will save staff time and provide more efficient services," Landers said. "We're desperate to have one that is functional and meets today's standards."

Landers has become a fixture in the community, contributing columns to local newspapers and leading planning meetings. Even in this time of uncertainty, Landers, who was hired as director in 2009, is a strong advocate for Scotts Valley's future branch.

"There are a lot of libraries in Santa Cruz County, but without a lot of square footage," Landers said. "It's a lot of small, antiquated libraries. This one has the potential to be an over-20,000-

square-foot library."

Plans have steadily moved forward since the city bought the 23,000-square-foot Scotts Valley Sports Center last summer for \$4.5 million, with designs to use about 13,000 square feet for the new library and the rest for retail options.

The project's \$7 million price tag will be paid for with nearly \$5 million in borrowed bond money and another \$2.7 million the city has saved from its redevelopment agency and developer fees. Since 1990, Scotts Valley has set aside about \$330,000 of those fees each year specifically for a library.

Into the future, that \$330,000 per year will be used to pay back the 30-year bond and interest on that bond, City Manager Steve Ando said.

The additional \$7.8 million interest the bond will accumulate over 30 years — for a total bond repayment of \$12.8 million — will also be paid with redevelopment money that the city agreed to spend on the library. By a written agreement, Santa Cruz County would have withheld that money from the city if it weren't used to pay for a library, Ando said.

Scotts Valley Mayor Jim Reed, who is also a member of the Santa Cruz Public Libraries Joint Powers Board and a leading advocate for the project's frugality, said that if the city chose

to forgo building the library, it would lose access to that money.

"We've been committed for years to have to build," Reed said. "If we don't open soon, we are obligated to pay rent on the existing building."

To help close escrow on the old sports center, the city borrowed about \$2 million from its wastewater enterprise fund, which will also be paid back using redevelopment money. The city is required to repay the borrowed money with interest by 2014, Ando said.

Earlier plans to build a library on empty land in Skypark as the centerpiece of the proposed Town Center were tossed last year, when city leaders got the chance to buy the sports center from the Slawinski family and renovate it — a much cheaper proposition than building from the ground up, Reed said.

The Scotts Valley City Council is scheduled to review bids to build the library in July, and construction will likely begin in July or August.

"This is a great opportunity to get a sorely needed community space without impacting the general fund one dime," Reed said.

The future is now

At 5,000 square feet, Scotts Valley's existing library is almost three times smaller than the planned library. During the 32 hours it is open each week, it's a hotspot for knitters, school children, researchers, homemakers, students and out-of-towners.

LIBRARY, CONTINUED ON PAGE 8

At a glance

■ The Scotts Valley Chapter of Friends of the Library plans to launch a Web site, www.fsvpl.org, where people can learn about the project and make donations. The site will be up and running in the next few weeks.

LIBRARY CONTINUED FROM PAGE 2.

But many say the city has outgrown the space, and resources like seating and computers are stretched.

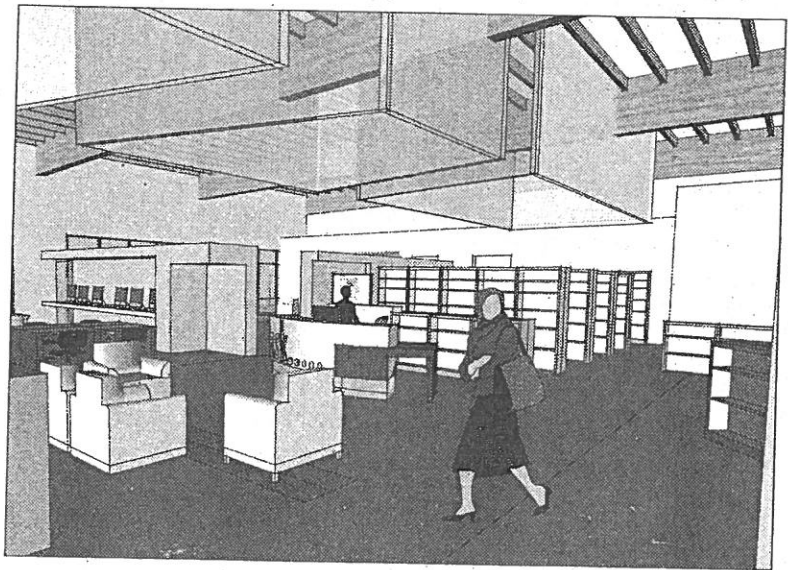
The Scotts Valley branch has the second-highest book checkout rate in the county. Last year, it had about 10,815 visitors, while another 342,600 people accessed the library's Web site.

The Friends of the Library's Scotts Valley Chapter has met there throughout the past year and half. So far, the group has raised \$25,000 to furnish and fill the new library.

"This is not going to be just a basic library. We want it to reflect our community in Scotts Valley," said Elizabeth Walsh, president of the Scotts Valley chapter. "There are a lot of families with children here, and we want it to be very family friendly."

The Friends plan to have a large-print section for folks with limited vision and an expanded teen area. There will also be public art walls, Walch said.

Another new feature will be a self-checkout system, added to a knowledgeable staff available to help patrons. The building will be structured to allow automatic check-in to streamline the task of



COMING SOON: The planned Scotts Valley library will symbolize hope, library director Teresa Landers has said, after Santa Cruz County library leaders were forced to cut more than \$1 million from their budget.

Courtesy illustration

sorting books, too — though the city cannot afford that system just yet.

"The goal is to have a setting in which everyone feels comfortable," Walch said. "We want to make the library suitable for the community and reflective of what Scotts Valley wants. We're eager to make it the best library it can be."

The decorative themes are still to be determined, but the Friends hope to incorporate Scotts Valley's history, Walch said.

People will have the opportunity to sponsor certain areas, she added.

Walch said the new library will also serve people in Felton and Boulder Creek, where library hours have been cut most drasti-

cally. The new branch will have the same schedule as the existing Scotts Valley library, and other libraries in the area will not change their hours as a result.

"We don't expect any major changes as a result of the new library," Landers said.

She said books to fill the library will be bought with gift money and

taken from existing collections. There will be many more computers, as well, she added.

"A library serves the community on so many levels, especially in hard economic times," Landers said. "It gives people a chance to research and look for jobs online for free. It's a productive resource that offers free services."

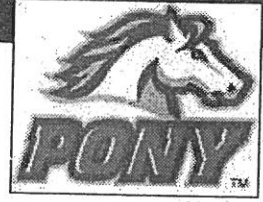
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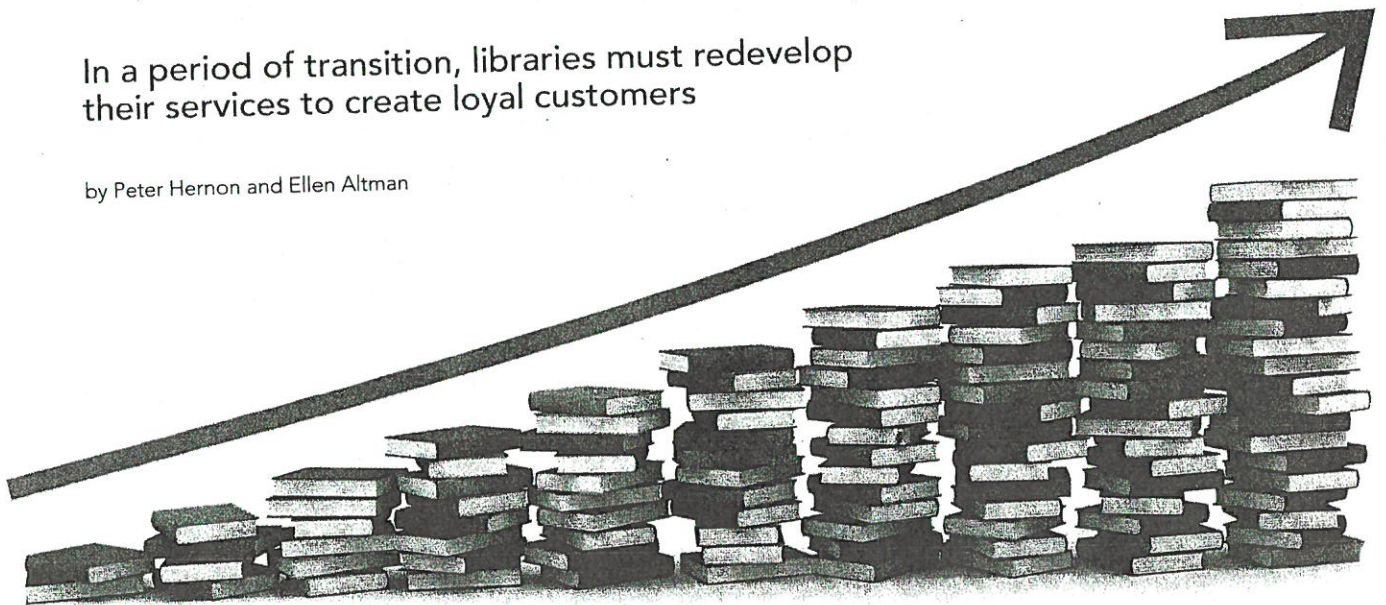
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EMBRACING CHANGE for Continuous Improvement

In a period of transition, libraries must redevelop their services to create loyal customers

by Peter Hernon and Ellen Altman



Progress implies change. Not all change is progress, but all progress requires change. Change can be planned or unplanned. Libraries have experienced some serious unplanned changes in the recent past; they have been buffeted by changes in technology and scholarly communication and the downturn in the economy. Even so, most libraries have adapted wonderfully to the changes and challenges created by the new technologies. Now is the time to plan for improvements in customer service and to create a cadre of loyal customers.

The box on page 53, developed from conversations with some state librarians and leaders in public libraries, suggests areas in which public librarians need expertise as new challenges arise. Those areas help to define the library's role in community building, which encompasses economic development, redevelopment and neighborhoods, workforce development, and civic engagement. In an April 2009 presentation at Simmons College reviewing these issues, San Francisco City Librarian Luis Herrera stressed the importance of service development, or reinventing service models. This includes defining reference services and roles, functions and processes, the library as a place, and virtual versus physical space. Accountability and assessment should not exclude program evaluation and determining the value of library services. Technology and the internet pose new challenges and opportunities as libraries engage in content creation and keep pace with new applications.

Coping with these issues and challenges requires a workforce that is not confined to a particular area of the library and enjoys reaching out to the library's communities. As part of coping, senior managers must manage stress and guard against staff suffering dangers cited by Thomas W. Shaughnessy in the July 1996 *Journal of Academic Librarianship*: "mental and physical exhaustion, burnout,

frustration, low morale, and other symptoms of stress. In some instances the library's structure adds to the distress by slowing response time, preventing cross-functional solutions to problems, and frustrating efforts to intervene."

Due to the current economic recession, a number of libraries are experiencing severe reductions in operating budgets, resulting in an inability to keep pace with inflation and having to take funds for equipment purchases from the acquisitions budget. Budget cuts also produce downsizing and staff reassignment; the result is an increased workload for the staff. Some libraries are consolidating services at the same time as they reconfigure the physical plant. Complicating matters even more, a number of libraries are moving toward evidence-based decision-making and a workforce committed to demonstrating accountability and improved services. All in all, these changes suggest an extremely challenging, but rewarding, time for libraries and their staffs.

Gathering library metrics

The type of metrics that libraries have historically collected and reported has created stakeholder dissatisfaction because these metrics do not adequately reflect their contribution to their communities. The metrics typically comprise outputs or performance measures, but none reflect customer-focused outputs relating to service quality or satisfaction and outcomes—the impact of programs and services. For instance, how many people using the library résumé service or other job-related services found full-time employment? Do children increase their reading levels after attending summer reading programs? If yes, by how many grade levels?

Such questions may involve accountability, which requires the adoption of a multiple-stakeholder framework and recognition that librarians are managers of complex service organizations. Any organization must balance its needs with those of other units in the institution, recognizing that budgeting occurs within a political context (e.g., competition with academic units and with other government agencies), while addressing issues of "How well?" "How satisfied?" "How productive?" and so forth. Consequently, the types of metrics that libraries use should settle on the quantitative and qualitative benefits that the library provides to its community.

Providing for Knowledge, Growth, and Prosperity: A Benefit Study of the San Francisco Public Library, a 2007 publication of the Friends of the San Francisco Public Library (sfpl.lib.ca.us/news/berkstudy.htm), notes that "for every dollar spent supporting SFPL, the citizens of San Francisco see a return in the range of \$1.40 to \$3.34." Turning to academic libraries, Sawyer Library of Suffolk University informs full-time students that, for the 2008–09 academic year,

FIGURE 1. CRITICAL ISSUES FACING PUBLIC AND STATE LIBRARIES

ISSUES	COMPONENTS
Operating in the political environment	<ul style="list-style-type: none"> • Governing structures, governing bodies, and relationships • Politics • Statutory and legal issues
Fiscal/financial management and leadership	<ul style="list-style-type: none"> • Enterprise creation and management • Revenue enhancement • Resource allocation • Resource reallocation (what to stop and start in tough times) • Collaborations for financial efficiency
Planning for leading	<ul style="list-style-type: none"> • Strategic planning • Tactical implementation • Demographics of who is served: the aging, different generations, ethnicity and language
Accountability and assessment	<ul style="list-style-type: none"> • Outcomes and evidence-based research and decision-making • Performance standards and metrics • Transparency as an organizational value
Ethical issues and values	<ul style="list-style-type: none"> • State and local ethics statutes/rules • Contracting issues
Interaction with stakeholders	<ul style="list-style-type: none"> • Building effective relationships • Education (primary school and up) • Government agencies and officials • Small business • Other constituencies and collaborators • Library Friends organizations • Library foundations and support organizations
Crisis management	<ul style="list-style-type: none"> • Media relations • Disaster management • Election/funding loss • Financial crisis • Intellectual freedom challenges • Library closings/reductions in hours • Crime • Homelessness
Staff development	<ul style="list-style-type: none"> • Collective bargaining • Succession planning • Turnover and training
Service development	<ul style="list-style-type: none"> • Evaluating/embracing trends and fads • Marketing and public relations • Literacy (early childhood, adult, computer/technology)

These changes suggest an extremely challenging, but rewarding, time for libraries and their staffs.

they paid about \$382 of their tuition to support the library, whereas a part-time student paid about \$26 per credit hour. In return, depending on the frequency of their virtual or in-person visits, students would accrue a minimum value of \$433.36 for use of library collections and services. Students and their parents can review the calculations of that amount if they are so inclined (www.suffolk.edu/sawlib/faq.htm).

Libraries reporting metrics frequently list those relating to budget allocation (input metrics), turnstile counts, or volume of business (output metrics). Although such "countables" are easily gathered (e.g., a hash mark for each reference question fielded or title processed), they fail to indicate more than "How many?" and to deal with what is important to customers or convey organizational effectiveness. Furthermore, they do not reflect the outcome of physical or virtual visits to

the library. The meeting or exceeding of customer expectations has a direct impact on organizational effectiveness, the creation and maintenance of customer loyalty, and customer satisfaction.

Whatever metrics libraries develop must reflect what is important to the institution, and there must be cohesiveness among the metrics adopted. One metric or customer-related indicator does not tell the complete story. How many metrics are needed? Which ones? Libraries have choices about what they assess and report; they should concentrate on those indicators most meaningful to the organization while overcoming inherent weakness.

Academic and public libraries should not limit the metrics that they report to ones demonstrating their uniqueness within the broader organization (inputs and outputs). Rather, they should address their role, for instance, in attracting and retaining faculty, students, or businesses; advancing learning; educating a workforce; providing an educational or a cultural facility; and assisting the job placement process. Libraries should partner with central administration, the faculty, and other community groups in providing those services that customers need and expect.

In *Viewing Library Metrics from Different Perspectives* (Libraries Unlimited, 2009) authors Robert E. Dugan, Peter Hennon, and Danuta A. Nitecki discuss metrics from four perspectives: the user in the life of the library, the user

and the library in the life of the institution, the library and institution in the life of the user, and the library and the institution in the life of stakeholders. Some of the metrics enable libraries to demonstrate their contribution and value to stakeholders, in part, by showing their impact on customers.

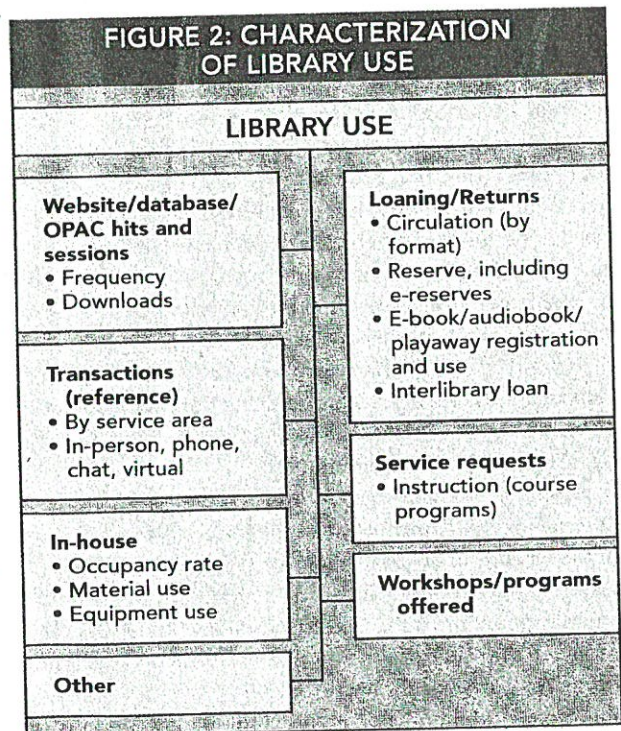
Maintaining customer loyalty

Identifying and serving loyal customers is an important part of the success of any organization. It is far easier and cheaper to keep a current customer than it is to get a new one. Current customers who frequently use the library have already demonstrated their support. Loyalty concentrates on repeat use and those making the most use of the library and its services.

Any determination of loyalty must address the issues listed in the box on this page and the customer's purpose for library use. The purpose might relate to use of the facilities, technology, staff, or collections. The identification of longtime loyal customers is an opportunity to let them know that the library appreciates their patronage. Formal appreciation of longtime customers is also an excellent public relations opportunity for the library, but how do libraries recognize it?

Developing a service vision

Service drives the library, not vice versa. For this reason, it is important to develop a service vision that stakes out an innovative competitive position addressing future expecta-



tions related to customer-service quality and satisfaction. Such a vision should be brief, clear, challenging, future-oriented, desirable, and perhaps inspiring.

Attention should shift from the provision of service, or from continuing to be all things to all people, to what libraries can do well or outstandingly. An effort should be made to identify, recognize, encourage, and reward exemplary service. Librarians should not assume the service they provide is exemplary or that they automatically know or can anticipate the expectations of their customers. They should set priorities, goals, and objectives; benchmark performance over time; and commit the resources necessary to maintain levels of exemplary service—that is, service that customers regard as exemplary.

One way to identify service gaps where corrective action is needed is to use quadrant charts such as those Counting Opinions (www.countingopinions.com) generates from respondents to its online satisfaction survey. The charts indicate which services customers find important; those they believe libraries already deal with effectively; and those needing improvement, where service gaps exist. The charts can also gauge reactions to decisions made as well as actions or changes undertaken. Any movement of measured perceptions over a few months informs the library how the public is reacting to a service change such as hours open and programs held or canceled.

There is a myth that, because a library exists, customers will come in large numbers, be satisfied, be loyal, and be supportive—willing to vote in favor of local propositions providing financial support to the public library. This belief needs to be set aside in order to determine what matters the most to customers, and how the knowledge gained can be applied to improve service delivery. These are the real challenges, and they present an excellent opportunity for libraries to serve their customers better. Service quality, satisfaction, and customer service are not the only issues, but they are fundamental to dealing with other issues and improving the quality of library services.

Libraries should take the quality journey; they need to meet changing expectations of customers, delight current customers, and seek out new customers. They should learn from their successes and mistakes and believe that everything can be improved. A belief that service is “good enough” does not inspire an organization to improve and to challenge itself. Continuous improvement is a worthy goal and metrics of *how many* or *how much* do not deal with issues central to any service organization at a time of intense competition.

Time for action, not excuses

A lack of resources is the frequent response of some librarians to suggestions that libraries offer new services, change some aspect of the organization, or adopt new indicators. This lack is also the explanation that academic and governmental managers often give to requests from libraries for funding increases. The actual reason is either an unwillingness to change or the view that the library is not as high a priority as fire, public safety, and so on.

Even though their budgets are mostly static or declining, library managers try to provide what most people want most of the time; in order for them to do so, it is important for them to know:

- the demographic characteristics of customers and the intensity of their relationship to the library;
- customers' preferences for materials, based on their information-gathering behavior—what they actually use;
- customers' views of library performance on such factors as timeliness, helpfulness, courtesy, reliability, and responsiveness.

With information about customers—their characteristics and preferences—libraries can target marketing strategies to both present and potential customers. Patrons' evaluations help libraries respond so that they can cultivate loyal customers who will rally support for bond issues or actively oppose threatened budget cuts. The payoff of learning about library customers and their requirements is their heavy use of materials and services and an enhancement of the library's service and resource reputation.

Present and potential customers make choices. Ease of use and likelihood of obtaining what is desired play a large part in driving these choices. The library's value, impact, and benefit can only be experienced and judged by customers. Is it worth the time, money, and staff to find out who they are, what they want in terms of materials and services, and how satisfied they are with those materials and services? We think it is. Now is the time for action. ■

The library's value, impact, and benefit can only be experienced and judged by customers.



PETER HERNON is a professor at the Simmons College Graduate School of Library and Information Science in Boston. ELLEN ALTMAN, now retired, was visiting professor in the Department of Library and Information Studies, Victoria University of Wellington in New Zealand until 1997. She has been a faculty member at the Universities of Kentucky and Toronto and at Indiana University, and director of the Graduate Library School at the University of Arizona. This article is excerpted from the second edition of *Assessing Service Quality: Satisfying the Expectations of Library Customers*, to be published in January by ALA Editions.

Tough Times and Eight Ways to Deal with Them

Many public libraries—in Colorado, the United States, and even worldwide—are facing significant financial troubles. We are part of a larger economic system, and this is a dip in the cycle. Such dips are inevitable over the course of one's career.

The purpose of this article is to provide an overview of some strategies for reining in expenditures without compromising the long-term integrity of our institutions. Making cuts isn't unusual. Businesses do it. Homeowners do it. In libraries, I believe there are eight basic approaches. Not all of them are good ones.

1. Make across-the-board cuts.

Just make every department in a large organization absorb a uniform percentage of reductions. Such an exercise may well help root out frivolous expenses, or discover more cost-effective alternatives. The problem is, some items—like utilities or insurance—aren't discretionary. Some library programs and practices are more essential to our mission than others.

This is the "nickel-and-dime" approach. It is easy, but not strategic. It is the path most taken, and one that most often leads to general decline.

2. Reduce the number (or cost) of library staff.

For every public library, this is the key cost, ranging from at least 51% upwards to 80% of the annual budget. To reduce costs without losing people, some libraries freeze salaries and shift a higher percentage of the cost of benefits to the employee. When that isn't enough, libraries seek to reduce head count. The continuum from gentle to drastic looks like this: Buy people out, freeze hiring and wait for attrition, reduce hours, force days off (furlough), or lay people off.

Most institutions move by stages along this continuum. But this isn't necessarily strategic, either. The people who leave aren't always the ones you want to leave, and may be the ones doing the jobs you consider most vital. The good news: recent jumps in technology (RFID,

self-check, automated materials handling) may allow us to provide better service with fewer staff. The not-so-good news: That technology has a cost, too, and capital money may be hard to come by in a crisis.

3. Gut the materials budget.

In an effort to save jobs, many libraries look to their second-largest category of spending to balance the budget: the acquisitions budget. I have concluded that this strategy is among the most dangerous. It's easy to lose collection relevance. It's very, very hard to get it back again. On the other hand, this might be the time to look at some benchmarks of use: How many times should an item have to be checked

out to be retained? Maybe we need to buy more copies of fewer titles.

4. Reduce the number of library facilities.

Buildings drive most library expenditures: staff, materials, IT, and maintenance. But be prepared: Closing a library will stir up strong emotions in almost any community. That might mean the birth of political will to raise necessary funds. It may also expose a common dilemma: People tend to demand services that they are unwilling to pay for. If that's the case, we need to say so, or commit slow suicide by our silence.

In general, the argument for closure must be buttressed by a

clear presentation of the financial facts, as well as other service standards (cost of circulation per item, distance between locations, staffing costs per use, etc.). This strategy—reducing the number of buildings—may well allow the library as a whole to continue to provide a high level of service, but at fewer locations.

5. Reduce the hours of library operations.

The fewer hours a library is open, the less it costs to run it. Most libraries have a predictable bell curve of use. A 20% reduction in hours might preserve 95% of the use—or all of it, if library users simply shift their schedules. Note that this really only saves money if it is also accompanied by a reduction in work force.

6. Raise fines and fees.

Inevitably, helpful members

Closing a library will stir up strong emotions. It may also expose a common dilemma: People tend to demand services that they are unwilling to pay for.

of the public suggest that all our financial problems are easily solved. All we have to do is charge for services we now provide for “free”: Boost our fines, charge for meeting rooms, rent out internet use, assess a fee for reserves, or even charge for library cards or checkouts.

In my experience, however, most of these don't generate a lot of money. What they do is reduce use. But some hike in these transaction fees may make sense anyhow, both for public relations effect (“You told us to raise our fees, and we did”) and to deliberately refocus efforts from one area to another.

7. Seek private funding, whether in dollars, in-kind services, or volunteer labor. On the one hand, the more layoffs there are, the larger is the pool of potential volunteers. On the other hand, there's less private money available. But the message of donations to a public institution whose use goes up but funding does not may well resonate with a community that now depends on the library more heavily.

8. Stop doing something you know you shouldn't be doing anyhow. Now is the time to shake the organization out of its complacency. In all of our organizations, we're doing something that isn't best practice, doesn't meet basic benchmarks of service, and costs a lot and serves few. This is the time to use the perfectly graspable explanation of “tight times” to demonstrate courageous management.

The importance of tone

There seem to be two basic philosophies about cuts: Make them invisible, or make them clear. I belong to the second camp.

When conscientious librarians try to absorb budget cuts without any fuss or disruption, they provide a disservice to their community. They hide the real costs of operation and suggest that there is no consequence for inadequate funding. Most people have no idea how libraries are funded, or what is necessary to keep them open. Public institutions should present as clear a case as possible about what they do, and what it takes to do it well. That's what transparency is about.

So making budget reductions clear means this: Mount a public campaign to say just where the money comes from, and how much. Let people know that you track the success of your programs, and you won't support those that aren't used. There is a sprinkling of good Return on Investment studies out there now. Libraries consistently return to their communities between \$4 and \$8 for every tax dollar received, a statistic that is particularly impressive in today's business environment, provided anybody hears us talk about it.

When you need to make cuts, tell people why, in simple and direct language. Say what you might cut. Invite the

public to weigh in, but keep the costs of your services on the table. If something is saved, then what is supposed to take its place to ensure the sustainability of the institution?

And when you decide what is going to be cut, give that a lot of publicity, too. Say when it's going to happen, and when it happens, remind them why.

Setting the stage for the future

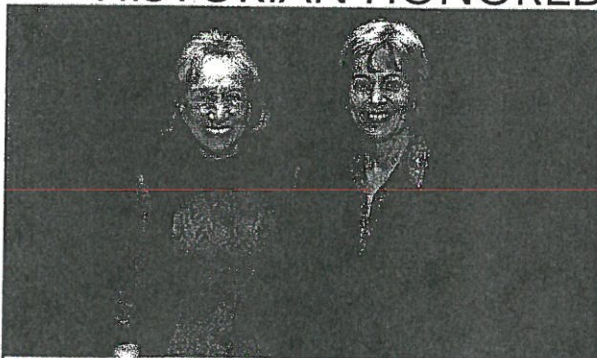
Today's crisis will pass. At that time, libraries will return to the larger crisis: the plain fact that most citizens have no idea what libraries cost, that—as OCLC's 2008 report “From Awareness to Funding” shows us—there is no relationship between use and support, that the actual expenditures on libraries are a fraction of the costs for many other services that have far less significance on our lives and communities, and that fewer libraries are making it to the ballot, or winning when they do.

A financial downturn has predictable results: Libraries all across the country are seeing an upsurge in use as people borrow what they cannot buy, attend programs that don't require an outlay of cash, retool for a new career, hunt for new jobs, or simply hang out in a friendly place.

This gives us an opportunity not only to demonstrate our value to the public, but to be emboldened to talk about it, to point out our long history of remarkably cost-effective service delivery, and the vital significance of our institution to the infrastructure of our shared lives.

We are there for our communities when they most need us, and if that becomes part of our message, maybe we can help them learn to be there for us, too. —James LaRue, director, Douglas County Libraries, Castle Rock, Colorado

HISTORIAN HONORED



Pulitzer Prize-winning biographer and historian Doris Kearns Goodwin (left) joins Nashville (Tenn.) Public Library (NPL) Director Donna Nicely. November 7. Goodwin was in town to receive the library's 2009 Literary Award, sponsored by the NPL Foundation. More than 650 people attended a lecture and fundraising gala featuring Goodwin.

SELF-SERVICE

TO THE

The California State Library
GoLibrary Project uses automated
materials vending to aid underserved
populations in new ways

By Susan Kantor-Horning

PEOPLE

It's called GoLibrary in the United States and Bokomaten in its native Sweden. Patrons know it as Library-a-Go-Go in Contra Costa County, CA, but whatever its name, the automated lending service this materials handling machine provides has proved a tremendous aid in addressing underserved segments of this sprawling community.

Commuter and resident benefits

It's not hard to imagine that nightmarish daily commutes might leave residents with little time or inclination to visit community libraries. Though not necessarily a point of pride, a recent national report indicated that Contra Costa County workers have the tenth worst commute in the nation and the longest commute west of the Mississippi River. The library can't help with the commute, but it does have a ton of materials that could make passing the time a little more pleasant—if patrons can get their hands on them. That's where the GoLibrary machine enters the picture.

The Contra Costa County Library's (CCCL) strategic plan conducted in 2004–05 identified residents as looking for a li-

Susan Kantor-Horning (skantor@ccclib.org), an Emerging Technologies Specialist at the Contra Costa County Library, CA, worked on the GoLibrary project in her former position as Operations Manager for Califa. The sidebar data was compiled by Lynn Blumenstein

brary experience that was fast, available at convenient locations, welcoming, easy to use, and customer-focused. Luckily, a former deputy county librarian of public services saw the book vending machine in operation at the Stockholm Public Library in 2006 while traveling to her native Sweden. According to Distec, the Swedish company that created the machine, GoLibrary could fit CCCL's needs, requiring only a location, a dedicated high-speed Internet connection, SIP2 (Standard Interchange Protocol, version 2) integration with the ILS, and RFID tags on books circulated from the machine.

Thanks to a generous 2007 Library Services and Technology Act-funded grant through the California State Library, commuters taking Bay Area Rapid Transit (BART) and residents living in an underserved area of the county will have immediate access to a wide variety of books at three locations (with a fourth in the works). Two of the current library materials vending machines have been installed at BART stations in the district and a third machine at a well-trafficked shopping center, which was additionally paid for in part by a grant from the Bay Area Library and Information System (BALIS). Two out of the three machines are accessible 24 hours a day.

Vending nuts and bolts

The Library-a-Go-Go service consists of a stand-alone machine, with access to a self-contained collection of approximate 1,000 paperbacks, that handles both checkouts and

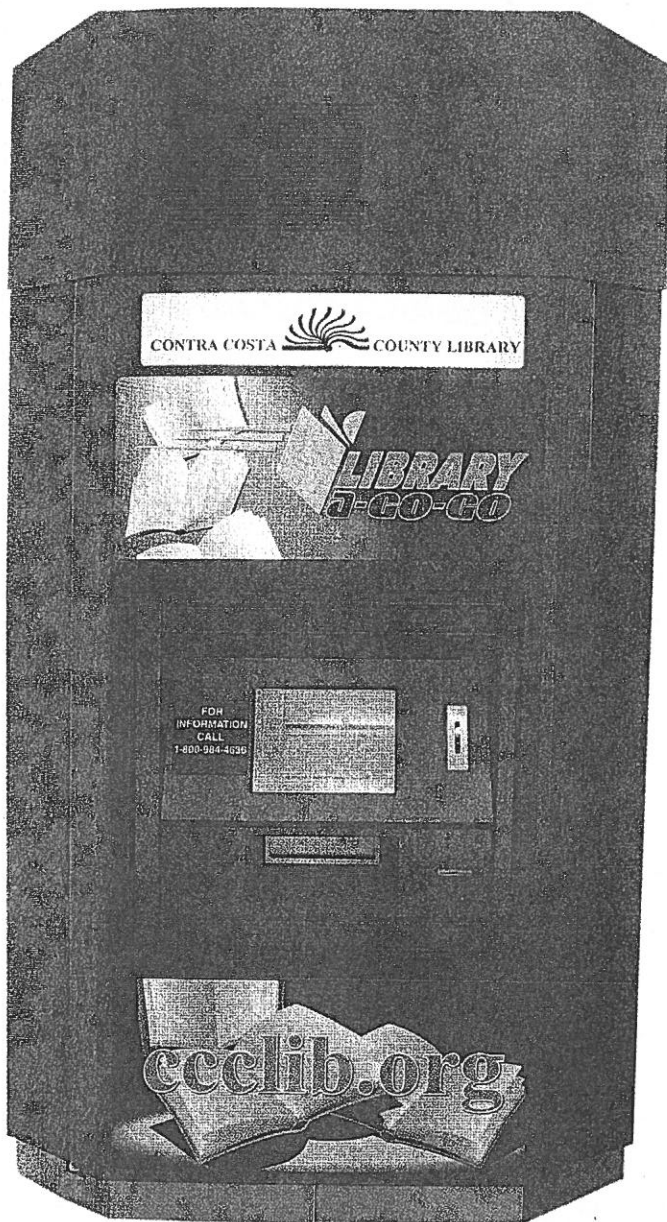
LINK LIST

Califa: GoLibrary FAQ, Documents, Press Releases, Videos, and Photos
califa.org/golibrary.php

Distec
distec.se/eng.htm

Never Fear, Your Contra Costa County Library Is Here!
Library-a-Go-Go Info Page
bit.ly/libraryagogo

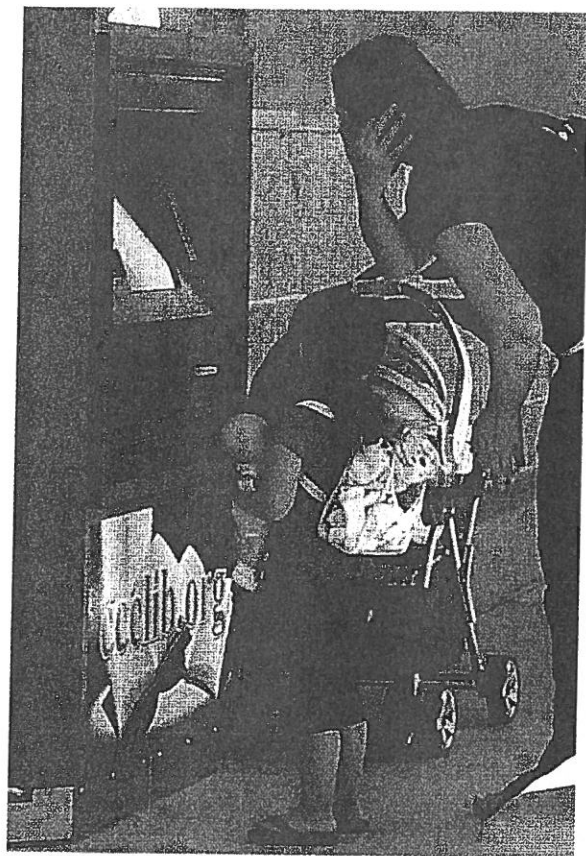
Not Your Mother's Library—Yuba County Library Director's Blog
nymlibrary.blogspot.com



returns to authorized cardholders. The customer logs in to the system with a library card and uses the touch screen to make a selection, which is delivered by a robotic arm. The item arrives in a plastic case through an open slot, with a receipt. To return materials, the process is reversed, and the item is returned in its case through the same slot. A second-generation machine installed at the Sandy Cove Shopping Center does not require the plastic cases.

CCCL decided to test the service by circulating books only. For the machine at the shopping center, the library agreed to a “no compete” clause concerning video or audio materials in deference to the nearby Long’s drugstore and Blockbuster. However, anything could potentially be put into the plastic cases, such as iPods, DVDs, etc.

While holds cannot be placed on materials in the machines, CCCL hopes soon to allow patrons to renew materials checked out from the machine through their accounts. However, there are concerns that the range of materials available to other patrons would be even more limited if renewals are allowed from a unit that holds only 400 titles.



COMMUTER APPRECIATION This freestanding GoLibrary machine has been a big hit with patrons, especially those with long commutes into San Francisco

The collection is updated every quarter. In terms of collection development, Library-a-Go-Go customers demand a greater range of titles than expected, and thus money needs to be allotted for refreshing the collections. Still, because all items are paperbacks, refreshing collections costs far less than expected. To stretch the collections further, the library no longer orders large quantities of a few titles but rather one to three copies of many titles.

Positive response

So how are patrons taking to the Library-a-Go-Go service? “Now the library has come to me!” said one satisfied patron. “I find that I am able to read more now,” said another, “since I commute to San Francisco daily. Thank you!” According to a small survey at the time of the first launch, 67 percent of respondents said they use the service primarily for materials to read during their commute, and 84 percent rated the service as excellent. Seventy-three percent even said they consider a machine their main “branch”!

In its first year of operation, the initial Library-a-Go-Go machine launched at the BART station has seen 1,624 circulations, an average of 135 per month. At any given time, 25 percent of the items are checked out at this location. The second machine, launched in late May at the shopping center, had 333 circulations during its first month of service. The third, which debuted in June at a major transit hub for over 8000 daily commuters, had 468 circulations during its first two weeks in operation and 30 percent of its collection checked out at any given time.

Rural benefits, too

Though urban and suburban commuters were the initial inspiration for installing the machines, the potential of automated

resolving software problems, it still does not have flawless quality assurance testing, which means that new operational "bugs" still crop up and require on-site troubleshooting.

Lessons learned

There have been a slew of other hurdles, too. After the equipment arrived, CCCL staff learned that an RFID tag was required not only for the book but also for the plastic case needed for the first-generation machines. This means that when the tags overlap physically they cannot be read, and the machine rejects the book from being checked in or added to the collection. Getting the RFID reader inside the machine to read the 3M tags has been a challenge since the tags use alphanumeric encoding, but the machine only reads tags using numeric encoding. The manufacturer is working on fixing the problem. Meanwhile, CCCL has installed a remote camera inside the machines for closer monitoring and troubleshooting of site malfunctions.

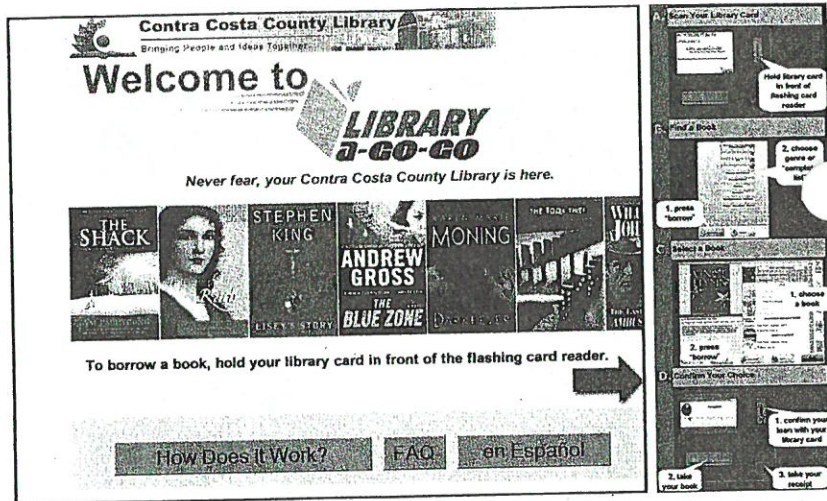
Modifications that Distec has made since the premiere of the Library-a-Go-Go service include programming the interface to show only available copies, the ability for borrowers with blocked cards to return overdue books to the machine, and the elimination of plastic cases to hold materials so users do not have to be responsible for them. This will also negate the risk of failed reads caused by overlapping tags. The size of the plastic cases used for the first-generation machines and the plastic trays inside the second-generation machines proved to be more of a challenge for the libraries than anticipated, as the service was designed to work with books according to standard European publishing sizes and not with the wide range of sizes

THE DISPENSER DESIGN WAS CONNECTED IN REAL-TIME TO THE LIBRARY SYSTEMS SO ACCOUNTS ARE UPDATED AND RETURNS ARE IMMEDIATELY AVAILABLE

for books published in the United States. The calibration of the trays that dispense the books in the second-generation machine has also been an issue.

Distec provides a customer checklist for the site arrangements libraries need to make, such as getting the necessary approvals from land and premise owners, finding a location protected from the weather, securing a supply of power, and establishing a dedicated high-speed Internet connection. In addition to the costs of the unit itself and the custom programming required to integrate it with the library's circulation system, other costs may be associated with changes required at the installation location. Renovations are often needed in order to place the machine in the best possible place for visibility and convenience. Such structural, electrical, and architectural costs vary with each location and must be taken into consideration with each individual implementation plan.

In addition, everyone involved in the project agrees that it is essential to have experienced library IT professionals, preferably an in-house IT department, to support the service.



On-screen instructions guide patrons through the borrowing process

The right staff

CCCL's Library-a-Go-Go service was introduced in May 2008 and received intense media coverage. Marketing has been crucial to its success. An internal subcommittee led by the county's public information officer identified key messages, established a marketing campaign, and brainstormed an opening event. In the days leading up to launch of the first machine, library staff were on-site at the BART station to promote the service, and local television stations carried teasers about the upcoming unveiling. The service continues to attract widespread interest from other libraries and media; the library won the California State Library PR Excellence Award for the project.

Library-a-Go-Go has its own page on the library's web site, and its holdings are included in the library catalog, where each machine is listed as a separate "location" so users can identify the material they can access there. Community outreach staff give hands-on demonstrations to promote the service, answer questions, and provide on-the-spot library card sign-ups.

These on-site registrations have been very successful. For all Library-a-Go-Go locations this year, CCCL has a combined total of 868 registrations. The library signed up 378 new members at the original BART station site, and the second BART installation has proven even more successful, with 150 on-site registrations within the first ten days of service. Also, having staff on-site allows them to witness the kinds of problems people encounter and to assist them in using the machine.

Future plans

The fourth and last CCCL installation is planned for early 2010 in an upcoming transit village, consisting of high-density housing, offices, and retail space on 7.5 acres. This machine is being funded through Contra Costa County's Redevelopment Agency and will be a built-in unit.

YCL is currently researching the possibility of obtaining additional technology products to support the county's efforts in covering its many underserved districts. (See Automated Materials Vending Options for info on a variety of products.)

While pioneering this new service has not been easy, everyone involved feels it has been worth the time and effort to deliver needed new services in areas where they previously did not exist.

vending doesn't end there. Susan Hildreth, former California State Librarian (now at Seattle Public Library), seeing the benefits of GoLibrary for rural libraries with few or no branches, invited the Yuba County Library (YCL) to participate as one of the beta testers and the second recipient of the grant. With over 600 square miles of service area and a population of just over 70,000, YCL's one facility along with a bookmobile strains to meet residents' needs. YCL director Loren McCrory enthusiastically agreed to participate in a project purported to require a minimum amount of staff time to maintain and very little overhead. Although McCrory had no prior experience with SIP2 or RFID, she and her one staff member were able to get up to speed with technical support from the CCCL staff.

Califa, a membership-based California library consortium, spent considerable staff time negotiating the contract with Distec on behalf of the project libraries and coordinating the purchase of the GoLibrary machines. (As of April 2009, Evanced Solutions has reached a distribution and service agreement with Distec to resell the machines in other parts of the country). Califa is the sole supplier of this equipment to California libraries and gave various levels of support such as mediating between the libraries and the vendor and working with a U.S. customs clearance agent to expedite the shipments to each delivery point. The machines were flown to California after being manufactured to specifications in Italy.

Technical hurdles bound

The grant project provided significant technical challenge the pilot libraries since it was the first implementation of a ropean-developed technology for dispensing books. It did integrate with any ILS that either Yuba County or Contra Costa County used. Prior to the arrival and installation of the units there was some general concern about Distec's ability to program SIP2 to work with each library's ILS—TLC's Carl.Solution CCCL and SirsiDynix for YCL. Yuba migrated from a home ILS, through the local community college, to a stand-alone SirsiDynix.net client-server solution and upgraded to SirsiDynix Symphony in order to include enhanced content needed helping patrons make selections from GoLibrary's touch screen. Thanks to the libraries' efforts, the project extended the capabilities of the original dispenser design by connecting in real time to the library systems so customer accounts are automatically updated, and books returned are immediately available to others. However, while the improved ILS allowed YCL to establish the SIP2 connection, the networking modifications have been tricky, causing considerable service downtime. CCCL also experienced intermittent problems with SIP2, including certain titles automatically renewing multiple times, resulting in unreliable statistics and indefinite due dates. While CCCL has been able to deliver the service successfully, one of the units has been seen more than 23 days of downtime. Although Distec work-

AUTOMATED MATERIALS VENDING OPTIONS

Whether to help underserved populations in remote areas, or just offer 24-hour access to materials, a number of options have recently become available to get books and media titles into the hands of library patrons. The products below require little to no oversight and may be just the ticket for improving service, without stressing out your staff.

VENDOR	Brodart	Libramation	Evanced Solutions*	Frich Corporation
PRODUCT	Lending Library www.books.brodart.com/Content3.aspx?P=114	LibraMate libramation.com	GoLibrary evancedsolutions.com/products.asp#golibrary	Library-To-Go** frichcorp.com/Product-AfterHourHolds.aspx
INSTALLATION	Freestanding with overhang	Freestanding or built-in; unit is customized	Freestanding with overhang	Freestanding, customizable
USES RFID	No	Yes	Yes	No
PLASTIC CASES NEEDED	No	Yes	Yes	No
CAPACITY	Hardcover, 180 Paperback, 360 DVD/Audio, 400	From 600-1000 items, depending on media mix	From 435-2000 items, depending on media mix	Yes for browsing collection; not for holds pickup
ACCEPTS RETURNS	No	Yes	Yes	Customizable; price-per-unit-storage from \$25-\$50 depending on style, quantity
ACCEPTS HOLDS	No	Yes	Yes	No
ILS INTEGRATION	Yes	Yes, via SIP2, NCIP, or direct via an API	No	Yes
BASE COST	Machine price under \$20,000, including hardware, software, first-year maintenance support, freight, and installation; sold with McNaughton subscription (extra cost)	NA	Yes, via SIP2	Yes; proprietary software links to catalog
SUPPORT COST	After first year, approx. \$2000/unit	1st-year parts and labor warranty, thereafter an extended warranty is available at 10% of cost	Book system is \$100,000-\$120,000 for machine; AV version costs less	\$80,000 for three units, including software and installation
MORE INFO	After first year, approx. \$2000/unit	one-year warranty, service agreement costs will depend on service level	AV-only units are available that don't require RFID	After first year, \$1000 for all units
	Allows patrons to view actual materials through the glass, as opposed to selecting from a list on a screen	Company also makes MediaBank, a standalone dispensing and return unit for AV media has different models with capacity from 500-3100 discs		Customer chooses title, takes receipt to be scanned into collection/holds unit, which allows correct box to be opened

*Info provided by Evanced, which has exclusive rights to sell the machine in most of the Northeastern quarter of the United States. Califa is also an authorized reseller in California.

**Developed for Mid-Continent PL, Kansas City, MO, adapted from Lock-a-Shelf™ Disc Storage into TwentyFour7™ Patron Reserve Systems. In addition to the products listed here, mk Sorting Systems says it will be debuting a similar materials vending option at the American Library Association Midwinter Meeting in Boston in January 2010. According to the company, the product will hold 800-900 items depending on type of media, won't require any special containers, and will accommodate both holds and returns.

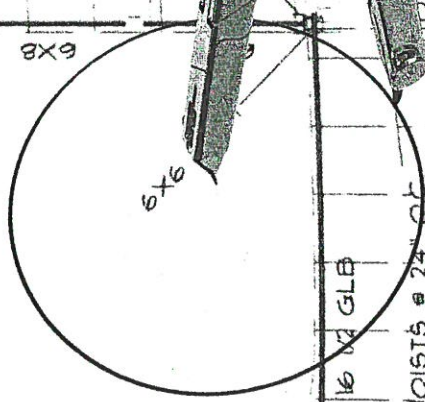
BEARING WAL

D13
S-4

D12
S-4

13'-4"
P3

D21
S-4.1



How to Thrive by Design in TOUGH TIMES

A low-cost library makeover
can turn newbie visitors into
hardcore patrons

by Lisa Rosenblum

First the bad news: The local economy is down, half of your branches close early three days a week, and staff hours have been cut by 20%.

Now the good news: Circulation and gate count have skyrocketed and people who haven't been inside a public library in decades are lining up for library cards.

While it may seem optimistic, hidden in this "good news/bad news" scenario most libraries are now enduring is a rare opportunity: Figure out what people really want from our libraries in order to turn novice users into loyal customers. Even if they only come in to check out DVDs or print a boarding pass, these new library users may discover an attractive alternative to the bookstores and internet cafés where they've been spending their money and time—if they like what they see when they walk through your doors. It might mean changing the way you staff your service points or how you display your collections, but with a little imagination and some diligent

attention to detail, you can make a library visit as essential to nontraditional visitors as a trip to the grocery store.

With the help of retail evaluation tools, library staff at the Hayward (Calif.) Public Library have accomplished just such a makeover. The transformation resulted in consistent increases in library usage and measurable improvements in customer satisfaction—a model from which almost any committed library can draw to make the best of these tumultuous times.

Hayward accomplished this with innovative retail measurements developed by EnviroSell, a global research and consulting firm specializing in the study of human behavior in retail, service, home, and online settings. Instead of using standardized library input and output measures, EnviroSell encouraged us to find out how people use the library, and where they go and what they do once they get inside. The goal: determining how to improve their experience and make them want to come back once the economy improves.

We discovered EnviroSell through an October 2005 audio conference on improving customer service through retail design. Sponsored by the Urban Libraries Council, the conference featured Paco Underhill, author of *Why We Buy* and founder of EnviroSell. A self-described retail

anthropologist, Underhill studies the interaction between “people and products and people and spaces.” The conference inspired the Hayward and San José public libraries to team up and, funded by an LSTA grant, examine their customers’ behavior from a floor-layout standpoint.

Voting with their feet

The two systems could hardly have been more different. The 18-branch San José Public Library was in the midst of a \$212-million capital improvement program that included the introduction of self-service options, one-stop service points, a new-books marketplace, colorful consistent signage, and technology centers. SJPL sought to measure the success of its innovations,

By contrast, Hayward Public Library’s two buildings (the Main and the smaller Weekes branch) were designed mid-century and were traditional in their provision of service. HPL wanted to know how to transform an old-fashioned library to appeal to modern customers and provide a level of customer satisfaction that could compete with the community’s other information options. And all with no capital-improvement funds.

We limited our study to the Weekes branch. Built in the early 1960s and expanded in 2001, the 8,000-square-foot facility served a community that was almost 80% Latino but also included a significant number of native Tagalog, Chinese, Hindi, and Vietnamese speakers. Whatever their language, patrons had to circumvent a large service desk and navigate a variety of homemade signs as they walked inside. Public computer use was available in two separate areas of the building, and while there was a small teen area, there were no separate rooms for group or quiet study. The only consistency was in the color scheme—largely brown and white—which was the same throughout the building.

Envirosell’s evaluation methodology had three main elements: customer tracking and dot-density maps, customer satisfaction surveys, and video analysis of traffic and usage in key library areas. Movement patterns were tracked for up to 30 minutes to determine how long people stayed, and they were surveyed in either Spanish or English as they left the library and received a small incentive for completing the survey. Video cameras set up in the ceilings at touch points where there was the most activity—i.e., near the checkout desk, near the public access computers, and by the self-checks—generated over 350 hours of tape, which was reviewed to analyze usage patterns. (In response to privacy concerns, signs were posted in both English and Spanish about the videotaping. Cameras did not capture titles being borrowed.)

Initial data for both library systems were relatively consistent and showed that 37% spent 21–30 minutes in the library, considered a long time for visits to retail establishments. Surveys also showed that customers were

surprisingly regular, with 70% reportedly visiting the same library once a week. While this may explain why some patrons get upset when collections or furniture are moved, it also suggests that libraries may have a built-in advantage when it comes to creating and nurturing brand loyalty.

At the Weekes branch, both videotape and dot-density maps showed that customers were willing to perform such basic functions as locating and checking out books. However, they could not navigate our minefield of confusing signs or such cluttered spaces as the large, clunky circulation desk. This was especially true of caregivers with small children in strollers. Directional signs often turned out to be misleadingly located and their handmade quality made them hard to read. Adding to the confusion was the absence of color cues to indicate area locations; e.g., the children’s area was painted the same color as the teen and adult sections. As a

First to go was the large circulation desk, which we cut in half and moved to one side.

result, the majority of questions asked of staff were directional ones, such as “Where are the DVDs?” In fact, only 15% of questions required the services of a credentialed librarian, suggesting that librarians may be better utilized when stationed in places other than at direct service points.

The data also indicated that in order to reduce customer confusion, staff needed to get out from behind the desk to proactively ask users about their needs. While some library staff may find this approach hard to understand, even thinking it intrudes on customer privacy, it has a big impact on customer satisfaction.

Armed with this information (but almost no money), we remodeled the Weekes Branch Library accordingly. First to go was the large circulation desk at the entryway, which we literally cut in half and moved to one side. In its place we created a one-stop service point with a librarian and support staff at a single desk; the extra empty space formed a decompression zone.

Often used in retail environments, decompression zones are an area of transition, usually at a store entrance, that allows customers to acclimate after entering. When done right, such a zone houses little clutter or distraction such as fliers or giveaways. The area should reflect the library brand, as customers form their first and lasting viewpoint of the library there.

We also revised our signage philosophy to adhere to Envirosell’s credo that “less is more.” Although we could not afford professional signs throughout the branch, we

MORE RETAIL TIPS

Among the additional recommendations that came out of Hayward Public Library's EnviroSell study are these:

- **Libraries are local.** Newspapers thrive when they cover local events. Libraries can too, if they stress what is unique nearby; highlight local events and community achievements; and offer programming that addresses the needs of the surrounding neighborhood.

- **Some users need help using libraries.** Intuitive and clutter-free design helps, but new users don't know how to navigate an integrated library system or Dewey without instruction. Perhaps the new trend away from Dewey has some merit.

- **Outward-facing book covers** were the most frequently viewed signage type by patrons according to the study—not surprising since new customers may be coming from bookstores. Do you need any more reason to market your collections with faceout books?

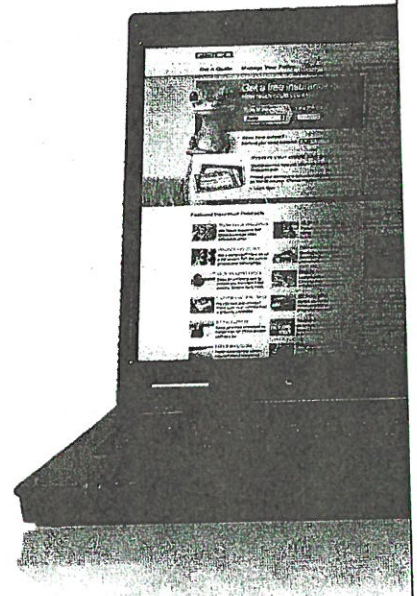
- **Bold, retail-like promotional signage outdoors** will attract drivers and passersby to your library.

purchased just enough to effectively designate the location of the library's three different zones. The three-dimensional signs also added aesthetic interest; an airplane and kite indicated the children's area and a skateboard hung above the teen center. Printer-generated signs still indicated book ranges, but some signage disappeared altogether; for example, we let the presence of DVDs in display units speak for itself. To aid multilingual patrons, universal symbols pointed out key services: A big question mark was placed over the reference service point, and a dollar sign indicated where to pay fines.

Since the dot-density maps showed that patrons of all ages wandered throughout the library but survey answers revealed that no one knew we even *had* a teen area, we took further steps to consolidate and brand areas. Computers in the teen center were rearranged so a group of people could sit at a single machine. Teens chose the furniture, which was purchased from IKEA. We replace it each year to refresh the area's look as styles change, but also because teens can be hard on tables and chairs; buying expensive items for this area makes little sense.

We also made room for a technology center in the adult section by weeding extensively and removing some stacks and adding a large, attractive sign. In addition to new

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children's area signs, we added colored slat wall to face out as many items as possible, as well as colorful bookshelves, toys, rugs, and a few child-oriented PCs.

The follow-up study, funded by a second LSTA grant, found that our low-cost makeover dramatically improved patron satisfaction. Visitors stayed longer, browsed more books, and rated their total experience higher. Ninety percent of those surveyed said they preferred the relocated, downsized circulation desk. The decompression zone that replaced the old circ station alleviated entryway congestion, affording customers a better transition from outside to inside and providing better sightlines.

Proving that good design saves staff time, computer usage rose in the new consolidated tech center even though no more computers were added, and the number of patrons asking directions dropped from 23% to 8%. It may be counterintuitive, but our experience convinced us that the less signage you have, the more people notice it: Fourteen percent more users said it was easier to find items in a given department.

Usage of the teen area rose from 11% to 25% of all customers; 6 out of 10 teens noticed the changes while 90% of those surveyed rated the space better than it was before. There was a rise from 3% to 11% of all visitors who said

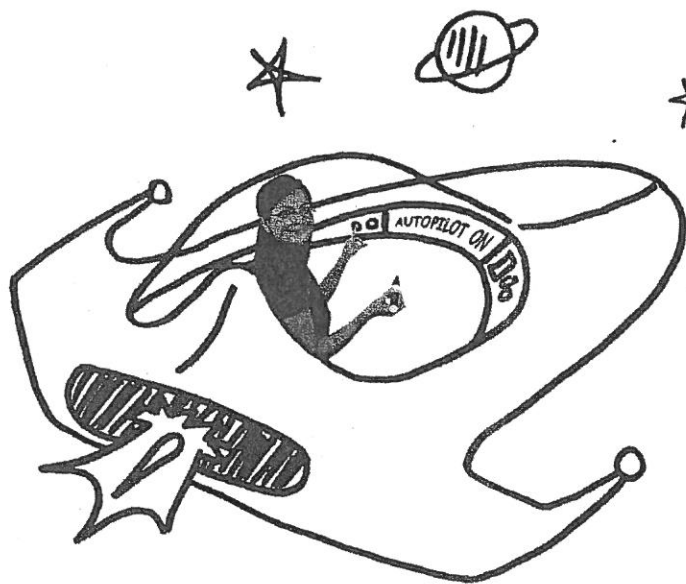
the children's area was their primary reason for visiting.

Among other suggested design-driven service tweaks was adding display gondolas such as those in bookstores to the new-book area; Envirosell observed that items from that display should have been more popular since it is closest to the entrance and its books face out attractively. Also, Underhill generally favors floor plans that encourage adjacency sales—in library terms, creating themed areas with mixed collections such as locating a popular collection near patrons lined up to use internet PCs. The proximity increases circulation and makes the wait seem shorter.

As changes in the economy draw ever more new users (especially GenXers and Millennials) into our libraries, we should do all we can to convert these stop-gap visitors into regulars. They may only be stopping in for a DVD after cancelling their Netflix account, but by doing our homework, we can turn them into lifelong patrons. ■



LISA ROSENBLUM is director of libraries for Sunnyvale, California, as well as a part-time faculty member at the San Jose State Graduate School of Library and Information Sciences. She was formerly director of library and neighborhood services for the city of Hayward.



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MONTHLY REPORT DECEMBER 2009

Programs and Partnerships

- Peet's Capitola Christmas Eve Fundraiser raised \$1130.00 which will go to the Friends.
- The Wish List program was given a boost with a Holiday Thank you/Encouragement for branches and the bookstores
- Continued background work on Marketing Plan for the Library
- Janis O'Driscoll, Division Manager, participated on the Selection Committee for first Santa Cruz County Poet Laureate with the Santa Cruz County Cultural Council
- A 1930's theme Sunday Film Series is planned for 2010 at Central
- The Business 2.010 Brown Bag Series is set for 2010 at Central- Partners include: Central Coast Small Business Development Center, SC Downtown Association, Bay Federal, SC Redevelopment, Friends
- -Janis O'Driscoll and Gale Farthing, Outreach Manager continued with preparations for the Get Involved State Library Volunteer Grant, including developing new volunteer job descriptions
- A campaign to issue library cards to all elementary school students at **Valencia School** was undertaken by Nancy Call, Aptos Librarian and the Aptos Circulation Staff

Outreach

- Once again the bookmobile was off the road with transmission problems. They did the routes in the van from December 9 through December 17.
- On December 8 Pam Downing and Bobbi Wolner, Librarians, attended the Lion's Club monthly meeting to present the MonoMouse. By that time, Pam and Bobbi both realized the MM was not what we wanted to purchase for library use. They demonstrated the MM to the Lions and, they too, could see that it is not the right tool for library users with limited vision. They told them about various hand held devices that might be a possibility and they are considering alternatives. Staff will set up a meeting by spring to bring out experts with other assistive devices to consider. These do cost more but are so much easier to use and are more versatile.
- Two book buddies died in December, both somewhat unexpectedly. The Library has been mostly successful in getting their books back, thanks in great part to Maple House 2 where one lived and to neighbors where the other lived.

Public Services

- This month at the Aptos Family Place Together in the Library with Mother Goose Timers, Sophia's Dad Everett, who is a native speaker of American Sign Language, came to enjoy the fun and volunteered to sign for us in circle time. This unexpected treat delighted parents and children alike who were coached on hand shapes and facial expressions. It was a great opportunity to emphasize the plasticity of young brains and the value of literacy activities

nurturing language development. Parents noted the pricelessness of focusing their time and attention on their babies without distractions--a one-on-one playtime learning experience they do weekly at the library.

- The ability to circulate materials from the Youth Services desk has been wildly popular with parents who appreciate not needing to wait in two lines to check out materials. It also gives the Youth Services staff an opportunity to have more contact with patrons.
- The Central Youth Services staff also set up a display “You’re never too young to have a library card” and offered to gift wrap all library cards during December. However, the gift wrap wasn’t necessary as many of the children wanted to use their cards immediately.



Here’s a photo of the cookie lighthouse created by preschoolers at the Central Library:

We offered free delivery for anyone willing to take it home before the closure. Two young boys convinced their dubious mother that they really needed to take it.

- Branciforte had some repairs done to the building and facilities during December. Matt Kiernan with the assistance of a plumber replaced the staff room sink faucet and repaired various problems in the public rest rooms. Also the photocopier was serviced because of repeated paper jams. The wifi router was upgraded and access times were set to the standards used throughout the library system.
- Branciforte is sharing a new volunteer with the Live Oak branch who will count and deposit the Friends money collected from the paperback and library bag sales as well as money donated to the book donation fund. These tasks were previously done by a staff member
- Except for some minor graffiti on our bike locker, there were no problems to report at Garfield Park during the December closure. Matt was very prompt in taking care of the graffiti for us.
- Some of the neighbors have commented about the weeds growing around the front and side lawn area near Garfield Park. Even though the lawn looks very nice (thanks again Matt!) the side areas are in need of some weed pulling. When staff explained that we don't have a landscaping company, and our maintenance staff is very busy, one neighbor asked if he could pull the weeds himself or organize a neighborhood weed pulling party. Staff will investigate the possibility of this. If power tools are not involved, it may be possible.
- Library patrons are not very happy about the leased books being pulled from GP. This is the first place many of them go when they walk in the door and they are quite startled when they find videos where the new books used to be. This was an area that patrons liked to browse when visiting the library and they are questioning why there aren't any new books for them to check out.
- After months of prep, the children's space was moved to the front of the library in Felton. Some shelving was removed in the adult space. There are less books, but it is so much easier to find the books that are there. Felton library is an open and inviting space because of the changes.
- The Boulder Creek chapter of the Friends put on a program making gingerbread houses. 17 people enjoyed creating houses with crackers and candy. Storytime continues to be popular.

Administration

- Focus groups for the strategic plan continued in December. One was held with staff, one with homeschooling families and one with the business community.
- Teresa Landers, Library Director, attended a statewide conference on Broadband in Libraries sponsored by the Gates Foundation.

- The Library participated in the downtown parade with its fabulous book cart drill team performing flawlessly as usual.
- Planning continued on the new Scotts Valley Library
- The Friends sponsored a wonderful staff appreciation holiday breakfast.
- Teresa participated in Leadership Santa Cruz County with December's focus on the business community and a day at the Boardwalk (no rides but a behind the scenes tour).

	Busyness/Open Hour			Circ/Open Hour			Visits/Open Hour			Refill/Open Hour		
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
July												
Aptos	258	393	52%	107	153	43%	71	98	38%	15	25	69%
Boulder Creek	78	218	178%	30	72	142%	22	86	289%	2	1	-22%
Branchforte	191	389	104%	70	120	70%	68	107	58%	13	59	351%
Capitola	201	341	70%	72	115	60%	56	73	30%	13	25	86%
Central	479	619	29%	204	254	25%	173	196	13%	36	76	110%
Felton	81	283	252%	28	79	186%	25	54	116%	8	5	-30%
Garfield Park	124	232	88%	44	76	73%	42	67	61%	6	11	85%
La Selva Beach	46	113	144%	15	20	33%	22	35	58%	2	1	-29%
Live Oak	184	290	57%	71	108	52%	65	88	36%	10	14	39%
Scotts Valley	251	320	27%	104	123	18%	75	89	18%	23	22	-5%
TOTAL	207	372	80%	82	141	71%	67	106	57%	14	31	121%
August												
Aptos	240	233	-3%	97	158	63%	71	88	24%	13	25	96%
Boulder Creek	74	221	197%	27	74	178%	20	87	344%	3	1	-67%
Branchforte	168	358	112%	64	119	87%	55	105	89%	12	59	369%
Capitola	188	314	67%	68	111	62%	48	66	36%	12	24	103%
Central	451	627	39%	190	266	40%	163	200	23%	33	76	129%
Felton	74	218	193%	24	61	151%	21	44	110%	5	5	-57%
Garfield Park	109	206	88%	36	65	82%	39	61	56%	1	11	110%
La Selva Beach	40	87	119%	13	24	81%	18	24	30%	2	2	-15%
Live Oak	164	290	77%	61	112	83%	60	84	41%	11	17	64%
Scotts Valley	218	297	36%	86	115	33%	56	83	48%	19	22	16%
TOTAL	189	360	91%	73	140	90%	61	102	68%	13	31	138%
Sept												
Aptos	239	369	54%	96	149	55%	64	91	42%	12	16	33%
Boulder Creek	75	209	179%	28	74	164%	22	41	86%	3	7	133%
Branchforte	166	320	93%	60	106	77%	69	95	38%	16	15	-6%
Capitola	177	304	72%	68	113	66%	50	69	38%	12	10	-17%
Central	412	589	43%	169	261	54%	158	199	26%	41	59	44%
Felton	70	240	243%	24	73	204%	23	40	74%	10	5	-50%
Garfield Park	108	208	93%	38	70	84%	41	40	-2%	6	9	50%
La Selva Beach	42	93	121%	14	25	79%	18	29	61%	2	2	0%
Live Oak	168	271	61%	66	105	59%	62	85	37%	10	21	110%
Scotts Valley	219	301	37%	90	119	32%	67	86	28%	20	14	-30%
TOTAL	183	344	88%	72	137	90%	62	91	88%	15	26	73%
Oct												
Aptos	242	366	51%	100	145	44%	68	87	29%	12	12	1%
Boulder Creek	74	215	191%	26	70	164%	15	51	237%	3	11	267%
Branchforte	173	370	114%	61	129	110%	73	116	60%	19	22	13%
Capitola	181	312	72%	68	116	69%	54	66	23%	13	10	-22%
Central	416	610	47%	167	268	60%	159	243	53%	35	52	48%
Felton	72	217	201%	24	64	165%	22	54	144%	10	13	37%
Garfield Park	108	187	73%	41	60	49%	52	54	3%	6	6	0%
La Selva Beach	41	96	134%	14	26	89%	19	28	47%	3	3	-68%
Live Oak	177	276	56%	75	107	43%	66	84	28%	12	10	-13%
Scotts Valley	222	304	37%	89	123	39%	72	85	19%	6	18	227%
Outreach	na	na		na	na		na	na		na	na	

	Busyness/Open Hour			Circ/Open Hour			Visits/Open Hour			Refillto/Open Hour		
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
TOTAL	1706	2953	73%	666	1108	66%	599	870	45%	118	170	44%
Nov (closed 1 wk)												
Aptos	214	402	88%	148	155	5%	55	90	64%	10	16	63%
Boulder Creek	68	232	242%	86	76	-11%	18	42	129%	2	14	505%
Branchforte	151	382	154%	161	128	-21%	59	100	69%	16	29	79%
Capitola	165	204	23%	132	114	-13%	45	65	44%	11	13	25%
Central	407	691	70%	248	305	23%	154	185	20%	37	70	87%
Felton	66	213	224%	127	64	-50%	20	47	136%	8	18	112%
Garfield Park	100	213	112%	95	71	-26%	34	64	87%	6	27	327%
La Selva Beach	33	101	205%	41	31	-25%	16	26	64%	2	1	-39%
Live Oak	160	338	111%	101	132	31%	37	90	148%	11	13	26%
Scotts Valley	191	329	72%	113	127	12%	54	86	60%	6	24	314%
TOTAL	1555	3104	100%	1252	1204	-4%	492	796	62%	109	226	107%
Dec (closed 1 wk)												
Aptos	231	408	76.51%	88	159	81%	59	100	71%	12	16	34%
Boulder Creek	72	214	198.27%	24	70	187%	18	39	117%	3	14	390%
Branchforte	174	339	94.59%	61	103	70%	63	102	62%	19	29	51%
Capitola	73	326	347.16%	65	108	66%	47	59	25%	13	13	4%
Central	442	700	58.56%	178	305	71%	437	193	-56%	35	70	97%
Felton	70	235	238.02%	23	69	201%	21	54	157%	10	18	83%
Garfield Park	108	206	90.62%	36	64	78%	38	56	48%	6	27	340%
La Selva Beach	37	100	169.65%	11	27	140%	15	26	67%	3	1	-57%
Live Oak	175	333	89.86%	65	129	100%	63	97	54%	12	13	16%
Scotts Valley	204	328	60.53%	75	126	67%	59	91	55%	6	24	337%
TOTAL	1586	3189	101.09%	627	1159	85%	820	817	0%	118	226	92%

VOLUME AND PERCENT CHANGE

	Circulation			Business*			Reference/info			Visitors		
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
July												
Aptos	23085	19560	-15.3%	55824	50334	-9.8%	3,136	3139	0.1%	15,380	12585	-18%
Boulder Creek	4962	3462	-30.2%	13810	10470	-24.2%	334	71	-78.7%	3,914	4151	6%
Branchforte	11536	6716	-41.8%	31273	21789	-30.3%	2,128	3276	53.9%	11,112	6006	-46%
Capitola	12601	9169	-27.2%	33714	24244	-28.1%	2,256	1998	-11.4%	9,402	5821	-38%
Central	47566	40625	-14.6%	111926	99046	-11.5%	8,358	12081	44.5%	40,180	31432	-22%
Felton	4862	2531	-47.9%	14168	9064	-36.0%	1,364	173	-87.3%	4,391	1728	-61%
Garfield Park	5604	3643	-35.0%	15847	11154	-29.6%	788	546	-30.7%	5,352	3229	-40%
La Selva Beach	1907	979	-48.7%	5735	3609	-37.1%	288	53	-81.6%	2,723	1109	-59%
Live Oak	14138	12065	-14.7%	36871	32510	-11.8%	2,019	1570	-22.2%	12,974	9870	-24%
Scotts Valley	20106	15773	-21.6%	48527	40942	-15.6%	4,342	2760	-36.4%	14,449	11409	-21%
TOTAL	146367	114523	-21.8%	367695	303162	-17.6%	25,013	25668	2.6%	119,877	87340	-27%
August												
Aptos	20967	20389	-2.8%	51832	50085	-3.4%	2,701	3139	16.2%	15,301	11242	-27%
Boulder Creek	4686	4161	-11.2%	13509	10587	-21.6%	552	49	-91.1%	3,460	4188	21%
Branchforte	9638	7806	-19.0%	27625	20027	-27.5%	2,045	3276	60.2%	9,099	5862	-36%
Capitola	11437	10607	-7.3%	30805	25134	-18.4%	1,950	1887	-3.2%	8,126	5256	-35%
Central	44372	42583	-4.0%	105513	100246	-5.0%	7,654	12081	58.3%	37,781	32012	-15%
Felton	4289	1959	-54.3%	13075	6972	-46.7%	2,004	156	-92.2%	3,664	1396	-62%
Garfield Park	4614	3141	-31.9%	13994	9876	-29.4%	693	546	-21.2%	4,992	2916	-42%
La Selva Beach	1655	771	-53.4%	4930	2791	-43.4%	243	53	-78.2%	2,258	760	-66%
Live Oak	12241	12548	2.5%	32700	32495	-0.6%	2,103	1936	-7.9%	11,989	9444	-21%
Scotts Valley	16571	14733	-11.1%	41922	38603	-7.9%	3,556	2760	-22.4%	10,815	10639	-2%
TOTAL	130470	118698	-9.0%	335905	296816	-11.6%	23,481	25883	10.2%	107,485	83715	-22%
* Defined as check ins/check outs/route ins/route outs												
Sept												
Aptos	20820	19091	-8.3%	51642	47173	-8.7%	2566	2110	-17.8%	13864	11689	-15.7%
Boulder Creek	4942	3547	-28.2%	13230	10019	-24.3%	527	312	-40.8%	3787	1963	-48.2%
Branchforte	9845	5947	-39.6%	27293	17902	-34.4%	2656	845	-68.2%	11290	5306	-53.0%
Capitola	11430	9015	-21.1%	29814	24349	-18.3%	2003	836	-58.3%	8347	5493	-34.2%
Central	39272	41717	6.2%	95619	94200	-1.5%	9416	9421	0.1%	36598	31871	-12.9%
Felton	4227	2335	-44.8%	12351	7676	-37.9%	1753	156	-91.1%	3995	1678	-58.0%
Garfield Park	4895	3373	-31.1%	13848	9973	-28.0%	705	420	-40.4%	5272	1943	-63.1%
La Selva Beach	1747	804	-54.0%	5258	2981	-43.3%	250	74	-70.4%	2189	929	-57.6%
Live Oak	13243	11776	-11.1%	33662	30353	-9.8%	2046	2392	16.9%	12433	9476	-23.8%
Scotts Valley	17226	15290	-11.2%	42057	38550	-8.3%	3824	1837	-52.0%	12949	10947	-15.5%
Outreach							1300	2747	111.3%			
TOTAL	127647	112895	-11.6%	324774	283186	-12.8%	27046	21150.33	-21.8%	110724	81295	-26.6%
Oct												
Aptos	21705	18559	-14.5%	52179	46884	-10.1%	2,603	1556	-67.3%	14592	11,177	-30.6%
Boulder Creek	4646	3340	-28.1%	13106	10320	-21.3%	515	516	0.2%	2677	2,354	-13.7%
Branchforte	10052	7211	-28.3%	28403	20712	-27.1%	3,143	1218	-158.0%	11939	6,508	-83.5%

	Circulation			Business*			Reference/Info			Visitors		
	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
Capitola	11489	9252	-19.5%	30440	24959	-18.0%	2,166	806	-168.7%	9025	5,271	-71.2%
Central	38849	42814	10.2%	96396	97660	1.3%	8,195	8359	2.0%	36851	38,928	5.3%
Felton	4233	2043	-51.7%	12729	6936	-45.5%	1,703	425	-300.7%	3913	1,335	-193.2%
Garfield Park	5186	2901	-44.1%	13880	8973	-35.4%	792	979	19.1%	6693	2,594	-158.0%
La Selva Beach	1724	842	-51.2%	5057	3074	-39.2%	311	26	-1096.2%	2367	895	-164.5%
Live Oak	14924	11973	-19.8%	35376	30941	-12.5%	2,302	1,122	-105.2%	13126	9,418	-39.4%
Scotts Valley	17020	15801	-7.2%	42595	39930	-6.6%	1,060	2314	54.2%	13839	10,938	-26.5%
Outreach	714	490	-31.4%	3153	2882	-8.6%	3,978	1833	-117.0%	na	357	na
TOTAL	130542	115226	-11.7%	333314	292271	-12.3%	26,768	19154	-39.8%	115022	78,597	-46.3%
Nov (closed 1 wk)	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
Aptos	18906	14920	-21.1%	46271	38594	-16.6%	2,147	1556	-27.5%	11900	8,660	-27.2%
Boulder Creek	4130	2752	-33.4%	11937	8356	-30.0%	417	516	23.7%	3248	1522	-53.1%
Branchforte	9029	5375	-40.5%	24687	16058	-35.0%	2,651	1,218	-54.1%	9678	4,183	-56.8%
Capitola	10539	6865	-34.9%	27777	12237	-55.9%	1,810	806	-55.5%	7522	3,877	-48.5%
Central	39602	36594	-7.6%	94359	82860	-12.2%	8,632	8359	-3.2%	35728	22,258	-37.7%
Felton	4068	1537	-62.2%	11574	5109	-55.9%	1,468	425	-71.0%	3531	1,137	-67.8%
Garfield Park	4573	2549	-44.3%	12824	7650	-40.3%	815	979	20.1%	4385	2,305	-47.4%
La Selva Beach	1307	735	-43.8%	4103	2419	-41.0%	221	26	-88.2%	1926	613	-68.2%
Live Oak	11310	11092	-1.9%	31941	28370	-11.2%	2,125	1,122	-47.2%	7304	7,596	4.0%
Scotts Valley	14475	12193	-15.8%	36767	31580	-14.1%	1,118	2314	107.0%	10340	8,285	-19.9%
Outreach	819	623	-23.9%	3122	2375	-23.9%	3,379	1833	-45.8%	na	714	na
TOTAL	118758	95235	-19.8%	305362	235608	-22.8%	24,783	19154	-22.7%	95562	61,150	-36.0%
	Circulation			Business*			Reference/Info			Visitors		
Dec (closed 1 wk)	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change	FY0809	FY0910	%change
Aptos	18973	15240	-19.7%	49920	39162	-21.6%	2,603	1556	-40.2%	12693	9,645	-24.0%
Boulder Creek	4286	2514	-41.3%	12652	7719	-39.0%	515	516	0.2%	3149	1,397	-55.6%
Branchforte	9957	4323	-56.6%	28581	14243	-50.2%	3,143	1,218	-61.2%	10310	4,274	-58.5%
Capitola	10978	6504	-40.8%	12236	19541	59.7%	2,166	806	-62.8%	7902	3,531	-55.3%
Central	41357	36543	-11.6%	102465	84033	-18.0%	8,195	8359	-2.0%	101492	23,207	-77.1%
Felton	4037	1656	-59.0%	12236	5640	-53.9%	1,703	425	-75.0%	3701	1,299	-64.9%
Garfield Park	4618	2317	-49.8%	13812	7405	-46.4%	792	979	23.6%	4827	2,006	-58.4%
La Selva Beach	1383	642	-53.6%	4610	2406	-47.8%	311	26	-91.6%	1901	616	-67.6%
Live Oak	12948	10851	-16.2%	35047	27947	-20.3%	2,302	1,122	-51.3%	12559	8,112	-35.4%
Scotts Valley	14488	12072	-16.7%	39209	31472	-19.7%	1,060	2314	118.3%	11314	8,776	-22.4%
Outreach	631	652	3.3%	2895	2378	-17.9%	3,978	1833	-53.9%	na	579	na
TOTAL	123656	93314	-24.5%	313663	241946	-22.9%	26,768	19154	-28.4%	169848	63,442	-62.6%

SANTA CRUZ PUBLIC LIBRARIES
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD
FINANCE COMMITTEE

MINUTES

JANUARY 4, 2010

Central Branch Meeting Room
224 Church Street, Santa Cruz

4:30 PM PUBLIC MEETING

I. ROLL CALL

Present: Citizen Barbara Gorson, Councilmember Mike Rotkin, Councilmember Sam Storey
(Called to order at 4:38 pm)

Staff: Teresa Landers, Director of Libraries
Jack Dilles, Director of Finance, City of Santa Cruz
Kira Henifin, Office Supervisor, Library

II. APPROVAL OF MEETING AGENDA OF JANUARY 4, 2010

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the agenda of January 4, 2010

UNAN

III. MINUTES OF October 26, 2009

Councilmember Rotkin moved, seconded by Councilmember Storey

that the Board approve the minutes of Oct 26, 2009.

UNAN

IV. STAFF REPORTS

1. Balance sheet: reviewed
2. Revenues: Sales tax receipts are running about 1.8% lower than projections. Fines and fees are significantly lower than expected. Property taxes are expected to be lower next year due to reduced assessments.
3. Local operating grants and contributions are the maintenance of effort contributions: fixed for Santa Cruz and Watsonville and based on property tax for unincorporated County, Scotts Valley and Capitola. Jack is going to see if there is a way to make this clearer. If not, Teresa will try to write it in before copying each month.
4. Personnel and other expenditures are holding their own.
5. The negative cash balance is still trending down.

6. Reviewed assumptions for 5 year projections. Teresa will revise based on discussion. No decision was made on how to treat the furlough. If status quo then furlough should go away in projections as it is an aberration that cannot be sustained in present form. Jack and Teresa will look at the possibility of running two different models.
7. Reviewed auditor's report- nothing unusual was found by the auditors. The auditors will be presenting to the JPB on Monday January 11.

V. NEXT MEETING TOPICS

Next meeting is scheduled for Monday January 25, 2010 4:30-6:30 pm. In the Central Library meeting room

VI. ADJOURN

The regular meeting adjourned at 5:35 p.m.

Respectfully submitted,

Teresa Landers
Library Director

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



County of Santa Cruz

COUNTY ADMINISTRATIVE OFFICE

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

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SUSAN MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

January 6, 2010

AGENDA: January 11, 2010

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

PRELIMINARY REVENUE ESTIMATE FOR 2010-11

Dear Members of the Board:

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

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

The Revised 2009-10 and Preliminary 2010-11 Revenue Estimates provide for significant reductions in the sales tax revenue available to the Library Financing Authority. The reductions are the result of the effects of the current recession on consumer spending. The current recession now represents the worst economic contraction since the Great Depression. The recession has now erased approximately 10 years of growth from the sales tax base.

Revenue Estimates

The table, which follows, shows:

- ✓ the Budget Amount Approved for 2009-10;
- ✓ the Revised Estimated Actual Amount for 2009-10 and the Variance from the Budget Amount;

**BOARD OF DIRECTORS
JANUARY 2010 REVENUE ESTIMATES**

- ✓ the Preliminary Estimate for 2010-11 and the Difference from the 2009-10 Estimate; and
- ✓ the Distribution Detail for the qualified public libraries.

Library Finance Authority - January 2010 Estimates

(1) Item	(2) Population %	2009-10			2010-11	
		(3) Approved Budget	(4) Jan Estimate	(5) Variance	(6) Jan Estimate	(7) Difference
Measure B (Sales Tax)		\$7,242,554	\$6,824,956	(\$417,598)	\$6,824,956	(\$417,598)
Maintenance of Effort						
City of Santa Cruz		1,394,751	1,394,751	0	1,394,751	0
City of Watsonville		541,684	541,684	0	541,684	0
County (Library Fund)		4,741,548	4,741,548	0	4,580,439	(161,109)
Interest Earnings		5,000	6,634	1,634	6,634	1,634
Total		<u>\$13,925,537</u>	<u>\$13,509,573</u>	<u>(\$415,964)</u>	<u>\$13,348,464</u>	<u>(\$577,073)</u>
Distribution Detail						
Measure B (Sales Tax)						
Watsonville Library	22.51%	\$1,630,299	\$1,536,298	(\$94,001)	\$1,536,298	(\$94,001)
Santa Cruz Library System	77.49%	5,612,255	5,288,658	(323,597)	5,288,658	(323,597)
Total	100.00%	<u>\$7,242,554</u>	<u>\$6,824,956</u>	<u>(\$417,598)</u>	<u>\$6,824,956</u>	<u>(\$417,598)</u>
Maintenance of Effort						
Watsonville Library	22.51%	\$1,503,214	\$1,503,214	\$0	\$1,466,948	(\$36,266)
Santa Cruz Library System	77.49%	5,174,769	5,174,769	0	5,049,926	(124,843)
Total	100.00%	<u>\$6,677,983</u>	<u>\$6,677,983</u>	<u>\$0</u>	<u>\$6,516,874</u>	<u>(\$161,109)</u>
Interest Earnings						
Watsonville Library	22.51%	\$1,126	\$1,493	\$368	\$1,493	\$368
Santa Cruz Library System	77.49%	3,875	5,141	1,266	5,141	1,266
Total	100.00%	<u>\$5,000</u>	<u>\$6,634</u>	<u>\$1,634</u>	<u>\$6,634</u>	<u>\$1,634</u>
Grand Total						
Watsonville Library	22.51%	\$3,134,638	\$3,041,005	(\$93,633)	\$3,004,739	(\$129,899)
Santa Cruz Library System	77.49%	10,790,899	10,468,568	(322,330)	10,343,725	(447,174)
Total	100.00%	<u>\$13,925,537</u>	<u>\$13,509,573</u>	<u>(\$415,964)</u>	<u>\$13,348,464</u>	<u>(\$577,073)</u>

Revised 2009-10 Estimate

As a result of the revised estimate for 2009-10 (Column 4), we anticipate that the total revenues available to the Library Financing Authority for distribution in 2009-10 will be \$415,964 below the budgeted amount approved in June 2009.

The revised sales tax estimate, which is \$417,598 less than the June estimate, is based on:

- 1. actual 2009-10 sales tax receipts for the first two quarters of the fiscal year which are \$179,793 below budget; and
- 2. our estimate that:
 - ✓ the sales tax amount for the third quarter of the fiscal year will be 5% lower than the budget estimate (\$89,755); and
 - ✓ the sales tax amount for the fourth quarter will be equal to the amount received for the fourth quarter of 2008-09 fiscal year which is 9.5% lower than the budgeted amount (\$148,050).

The 2009-10 property tax estimate is consistent with the June 2009 estimate. The one time property tax loss associated with the 2009-10 State Budget of \$282,401 will be covered by County participation in the Proposition 1A Loan Securitization Program offered by California Communities. The California Communities loan program was concluded in November of 2009. As a result of the loan program, the 2009-10 State property tax shift has no effect on the County Library Fund.

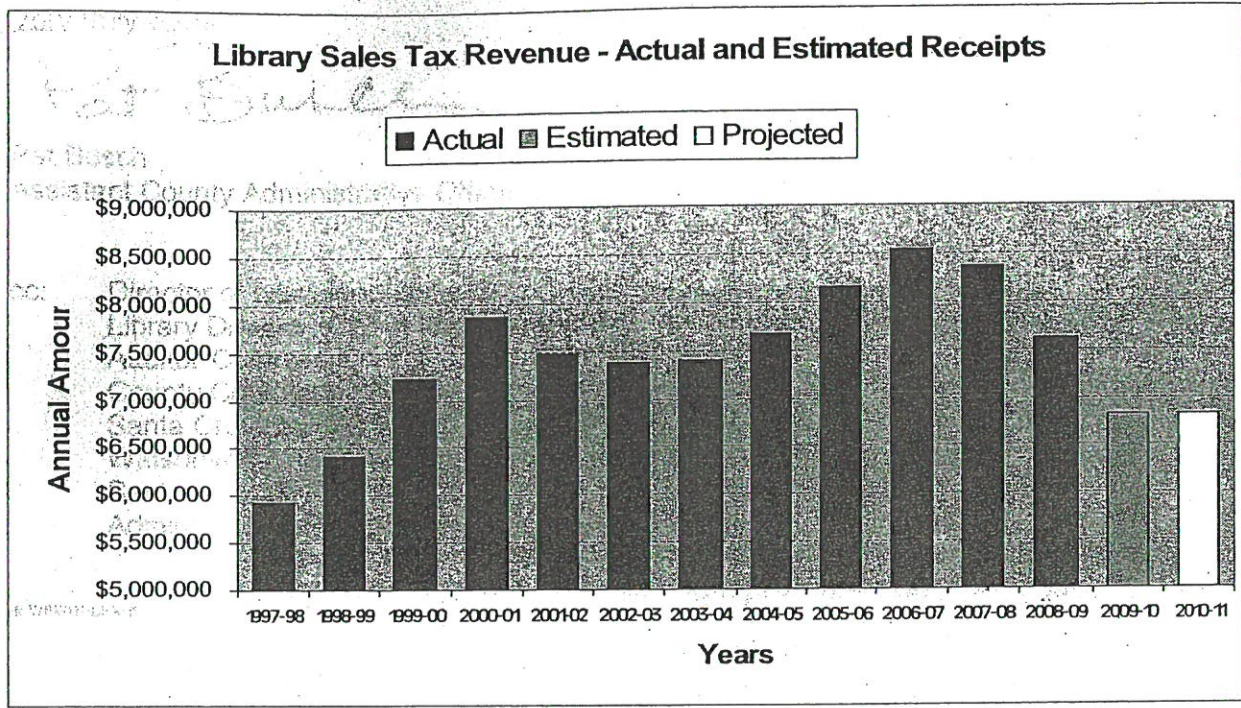
The bond issued by California Communities is secured by a repayment pledge by the State of California. The bond is payable in 2013.

We anticipate that 2009-10 interest earnings for the Library Financing Authority will be \$1,634 over the June 2009 estimate.

The Preliminary 2010-11 Estimate

The preliminary estimate for 2010-11 (Column 6) is that the total revenues available to the Library Financing Authority will be \$577,073 less than the budgeted amount for 2009-10.

The sales tax component of the 2010-11 preliminary estimate is based on 2009-10 performance. The estimate anticipates that sales tax receipts will reach bottom in 2009-10 and will be flat for the 2010-11 fiscal year. The estimate does not provide for recovery in 2010-11. The graph which follows provides a visual perspective on Library Sales Tax Revenues, the effect of the current recession on available financing and the 2009-10 and 2010-11 revenue estimates.



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

The property tax component of the 2010-11 revenue estimate is based on a 7% decrease in secured property taxes in the County Library Fund as a result of Proposition 8 adjustments by the Assessor. This reduction will be partially offset by an increase in secured property taxes for 2009-10 which will be distributed to the libraries in 2010-11.

Updates

In accordance with your Board's direction this office provides an update at the end of each quarter to the members of the Authority and to the libraries and the cities. In April 2010 when actual sales tax revenue for the third quarter of the current fiscal year are known we will provide the next update. We anticipate that the Assessor will have an updated estimate for property taxes by that time.

Attachments 2 and 3 of this letter are copies of the updates provided in July and October of 2009.

Recommendation

At this time it is RECOMMENDED that your Board approve the amounts in the table on page 2 of this letter as the Revised Revenues Estimate for 2009-10 and the Preliminary Revenue Estimate for 2010-11.

Very truly yours,



Pat Busch
Assistant County Administrative Officer

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

**LIBRARY JOINT POWERS AUTHORITY
COMBINED BALANCE SHEET
JPA FUND AND ACCOUNT GROUPS
DECEMBER 2009**

	JPA Total
Assets	
Infrastructure	579,683.02
Accumulated depreciation - infrastructure	(164,848.89)
Buildings	1,758,907.67
Accumulated depreciation - buildings	(765,044.52)
Lease improvements - buildings	259,124.00
Accumulated depreciation - lease imp-buildings	(163,048.94)
Machinery and equipment	1,628,318.81
Accumulated depreciation - machinery & equip	(1,471,843.15)
Software	61,759.70
Accumulated depreciation-software	(61,759.70)
Construction in progress	52,613.65
Total Assets	1,713,861.65
Liabilities	
Accounts payable	30,367.10
Sales tax payable	95.03
Deferred grant revenue - unearned	529.84
Unclaimed funds	1,204.45
Cash loan from city	707,533.76
Pooled cash interest payable	1,206.43
Payable to the County - noncurrent	120,879.18
Other intergovernmental payable-noncurrent	430,150.27
Total Liabilities	1,291,966.06
Equities	
Unreserved, undesignated fund balance	(740,936.61)
Investment in capital assets - Library	1,713,861.65
Reserved for long-term debt	(551,029.45)
Total Equities	421,895.59
Total Liabilities and Equities	1,713,861.65

**LIBRARY JOINT POWERS AUTHORITY
COMBINED BALANCE SHEET
SPECIAL FUNDS
DECEMBER 2009**

Fund #	955	956	957	960	Spec Funds
Fund Description	Contingency	Technology	Projects	Felton	Total
Assets					
Pooled cash	9,341.93	4,720.26	464.76	1,115.20	15,642.15
Pooled cash interest receivable	26.18	13.22	1.60	10.65	51.65
Total Assets	9,368.11	4,733.48	466.36	1,125.85	15,693.80
Equities					
Unreserved, undesignated fund balance	9,368.11	4,733.48	466.36	1,125.85	15,693.80
Total Equities	9,368.11	4,733.48	466.36	1,125.85	15,693.80

2

**LIBRARY JOINT POWERS AUTHORITY
COMBINED BALANCE SHEET
TRUST FUNDS
DECEMBER 2009**

	Fund #	931	932	933	934	Trust Funds Total
Fund Description	McCaskill Loc His	McCaskill Vis Imp	Finkeldey	Whalen		
Assets						
Pooled cash	261,935.85	252,875.50	9,596.60	146,468.30		670,876.25
Pooled cash interest receivable	735.16	711.37	27.11	377.74		1,851.38
Total Assets	262,671.01	253,586.87	9,623.71	146,846.04		672,727.63
Equities						
Net assets held in trust-library prog	262,671.01	253,586.87	9,623.71	146,846.04		672,727.63
Total Equities	262,671.01	253,586.87	9,623.71	146,846.04		672,727.63

Expenditure Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

951 Library Joint Powers Authority

56%

Account Number	SERVICES	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
951-52000	SERVICES						
951-36-50-3510-52135	Financial services - outside	6,200.00	2,875.95	6,009.95	381.05	-191.00	103.08
951-36-50-3510-52149	Interagency labor charges	653,046.00	61,321.48	358,535.47	0.00	294,510.53	54.90
951-36-50-3510-52199	Other professional & technical services	18,018.00	375.00	17,410.20	3,749.73	-3,141.93	117.44
951-36-50-3510-52240	Office equipment operation/maint	4,620.00	0.00	1,758.76	0.00	2,861.24	38.07
951-36-50-3510-52244	Other equipment operation/maintenance	400.00	0.00	0.00	0.00	400.00	0.00
951-36-50-3510-52302	Travel and meetings	2,000.00	0.00	6.60	0.00	1,993.40	0.33
951-36-50-3510-52402	Telecommunications service - internal	82,224.00	20,556.00	41,112.00	0.00	41,112.00	50.00
951-36-50-3510-52403	Telecommunications service - outside	21,794.00	271.04	8,326.37	14,934.33	-1,466.70	106.73
951-36-50-3510-52933	Liability insurance/surety bonds-outside	13,167.00	0.00	11,430.00	0.00	1,737.00	86.81
951-36-50-3510-52960	Advertising	3,000.00	0.00	0.00	0.00	3,000.00	0.00
951-36-50-3510-52961	Dues and memberships	2,720.00	0.00	1,045.00	0.00	1,675.00	38.42
951-36-50-3510-52972	Printing and binding-outside	7,500.00	0.00	2,816.34	0.00	4,683.66	37.55
951-36-50-3510-52973	Moving Costs	8,170.00	0.00	8,168.92	0.00	1.08	99.99
951-36-50-3540-52135	Financial services - outside	599,526.00	53,805.14	258,466.23	0.00	341,059.77	43.11
951-36-51-3520-52131	Claims management services - outside	16,000.00	1,405.15	7,902.85	8,099.75	-2.60	100.02
951-36-51-3520-52149	Interagency labor charges	1,150,643.00	159,381.86	548,585.84	0.00	602,057.16	47.68
951-36-51-3520-52244	Other equipment operation/maintenance	2,500.00	0.00	1,044.00	0.00	1,456.00	41.76
951-36-51-3520-52248	Software maintenance services	17,588.00	281.12	9,020.68	0.00	8,567.32	51.29
951-36-51-3520-52972	Printing and binding-outside	10,000.00	0.00	1,686.32	0.00	8,313.68	16.86
951-36-52-3530-52149	Interagency labor charges	4,310,341.00	420,430.24	2,143,796.69	0.00	2,166,544.31	49.74
951-36-52-3530-52244	Other equipment operation/maintenance	3,000.00	0.00	0.00	0.00	3,000.00	0.00
951-36-52-3530-52302	Travel and meetings	2,255.00	194.70	504.86	0.00	1,750.14	22.39
951-36-52-3530-52972	Printing and binding-outside	3,000.00	0.00	978.76	0.00	2,021.24	32.63
951-36-53-3515-52149	Interagency labor charges	219,481.00	25,089.14	106,327.35	0.00	113,153.65	48.44
951-36-53-3515-52201	Water, sewer and refuse	64,706.00	2,579.68	25,030.57	0.00	39,675.43	38.68
951-36-53-3515-52211	Janitorial services	180,928.00	25,704.66	77,576.19	76,651.77	26,700.04	85.24
951-36-53-3515-52223	Vehicle operation charges - internal	38,103.00	1,201.72	21,058.58	0.00	17,044.42	55.27
951-36-53-3515-52246	Building and facility o & m - outside	141,611.00	3,587.67	66,909.93	27,622.82	47,078.25	66.76
951-36-53-3515-52247	Landscaping maintenance services	12,975.00	1,965.00	4,548.86	0.00	8,426.14	35.06
951-36-53-3515-52261	Equipment, building and land rentals	401,232.00	32,682.44	197,374.72	54,857.00	149,000.28	62.86
951-36-53-3515-52302	Travel and meetings	250.00	0.00	0.00	0.00	250.00	0.00
951-36-53-3515-52932	Liability insurance/surety bonds-interna	15,500.00	3,875.00	7,750.00	0.00	7,750.00	50.00



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Expenditure Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

951 Library Joint Powers Authority

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
951-36-53-3515-52933	33,187.00	0.00	28,693.00	0.00	4,494.00	86.46
951-36-54-3550-52149	544,351.00	58,967.87	267,516.85	0.00	276,834.15	49.14
951-36-54-3550-52199	22,000.00	250.00	6,544.50	7,604.50	7,851.00	64.31
951-36-54-3550-52248	66,051.00	1,289.81	24,434.69	33,692.53	7,923.78	88.00
951-36-54-3550-52249	60,300.00	0.00	10,048.63	0.00	50,251.37	16.66
951-36-54-3550-52302	1,430.00	179.30	396.00	0.00	1,034.00	27.69
951-36-54-3550-52403	58,423.00	7,226.56	54,116.61	1,044.56	3,261.83	94.42
951-36-55-3560-52149	671,454.00	102,952.56	243,160.30	0.00	428,293.70	36.21
951-36-55-3560-52302	660.00	80.41	899.76	0.00	-239.76	136.33
951-36-55-3560-52304	10,910.00	24.59	2,378.00	0.00	8,532.00	21.80
951-36-55-3560-52306	6,762.00	0.00	0.00	0.00	6,762.00	0.00
951-36-55-3560-52972	6,000.00	165.24	473.05	0.00	5,526.95	7.88
Total SERVICES	9,494,026.00	988,699.33	4,573,843.43	228,638.04	4,691,544.53	50.58
951-53000	SUPPLIES					
951-36-50-3510-53101	Postage charges	391.89	2,999.08	0.00	14,000.92	17.64
951-36-50-3510-53102	Office supplies	147.41	4,320.72	0.00	12,179.28	26.19
951-36-51-3520-53106	Books and periodicals	42,615.97	249,674.07	0.00	589,325.93	29.76
951-36-51-3520-53107	Books and periodicals-grants & donations	5,058.88	13,569.89	0.00	-2,969.89	128.02
951-36-51-3520-53112	Library functional supplies	150,276.00	38,736.61	1,108.49	110,430.90	26.51
951-36-52-3530-53109	Copier supplies	7,248.00	2,066.20	0.00	5,181.80	28.51
951-36-53-3515-53108	Safety clothing and equipment	3,690.00	900.47	0.00	2,789.53	24.40
951-36-53-3515-53113	Janitorial supplies	18,000.00	6,407.82	0.00	11,592.18	35.60
951-36-53-3515-53311	Electricity	152,710.00	5,412.77	0.00	76,230.22	50.08
951-36-53-3515-53312	Natural gas	25,200.00	2,499.49	0.00	19,811.89	21.38
951-36-54-3550-53110	Computer supplies	18,000.00	3,589.52	6,500.39	7,910.09	56.06
Total SUPPLIES	1,258,224.00	60,801.80	404,132.27	7,608.88	846,482.85	32.72
951-54000	OTHER MATERIALS AND SERVICES					
951-36-50-3510-54990	Miscellaneous supplies and services	3,480.00	0.00	0.00	3,480.00	0.00
951-36-52-3530-54990	Miscellaneous supplies and services	0.00	0.00	0.00	-32.00	0.00
951-36-53-3515-54990	Miscellaneous supplies and services	0.00	-35.07	0.00	0.00	0.00
951-36-54-3550-54990	Miscellaneous supplies and services	0.00	0.00	0.00	-23.31	0.00
951-36-55-3531-54990	Miscellaneous supplies and services	2,500.00	0.00	385.45	1,232.00	882.55



Expenditure Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

951 Library Joint Powers Authority

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
951-36-55-3560-54990 Miscellaneous supplies and services	7,275.00	0.00	2,228.29	0.00	5,046.71	30.63
Total OTHER MATERIALS AND SERVICES	13,255.00	-35.07	2,669.05	1,232.00	9,353.95	29.43
951-56000 OTHER CHARGES						
Total OTHER CHARGES	0.00	0.00	0.00	0.00	0.00	0.00
951-57000 CAPITAL OUTLAY						
Total CAPITAL OUTLAY	0.00	0.00	0.00	0.00	0.00	0.00
951-58000 DEBT SERVICE						
951-36-50-3540-58140 Loan principal	39,022.00	0.00	0.00	0.00	39,022.00	0.00
951-36-50-3540-58190 Other debt principal	40,293.00	0.00	40,293.07	0.00	-0.07	100.00
951-36-50-3540-58240 Loan interest	41,508.00	-2,991.20	0.00	0.00	41,508.00	0.00
951-36-50-3540-58290 Other debt interest	8,500.00	0.00	3,932.60	0.00	4,567.40	46.27
Total DEBT SERVICE	129,323.00	-2,991.20	44,225.67	0.00	85,097.33	34.20
951-59000 OTHER FINANCING USES						
Total OTHER FINANCING USES	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	10,894,828.00	1,046,474.86	5,024,870.42	237,478.92	5,632,478.66	48.30



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 Periods: 6 through 6

Revenue Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

951 Library Joint Powers Authority

50%

Account Number	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Pct Rcvd
951-41000 TAXES					
951-00-00-0000-41211 Sales and use tax	5,612,255.00	445,567.50	2,231,005.39	3,381,249.61	39.75
Total TAXES	5,612,255.00	445,567.50	2,231,005.39	3,381,249.61	39.75
951-43000 INTERGOVERNMENTAL					
951-36-00-0000-43210 State operating grants and contributions	70,000.00	0.00	0.00	70,000.00	0.00
951-36-00-0000-43310 Local operating grants and contributions	5,114,769.00	431,230.75	2,156,153.75	3,018,615.25	41.67
951-36-50-3510-43190 Federal grants - other	6,762.00	0.00	6,978.00	-216.00	103.19
951-36-55-3531-43210 State operating grants and contributions	2,500.00	0.00	742.00	1,758.00	29.68
Total INTERGOVERNMENTAL	5,254,031.00	431,230.75	2,163,873.75	3,090,157.25	41.19
951-44000 CHARGES FOR SERVICES					
951-36-00-0000-44613 Internet use fee	7,000.00	219.10	2,198.15	4,801.85	31.40
951-36-00-0000-44630 Room rentals-library JPA	1,890.00	-40.00	790.00	1,100.00	41.80
951-36-00-0000-44680 Interlibrary loan reimbursement	0.00	0.00	88.73	-88.73	0.00
951-36-00-0000-44901 Photocopy fee	10,000.00	522.10	3,684.59	6,315.41	36.85
Total CHARGES FOR SERVICES	18,890.00	701.20	6,761.47	12,128.53	35.79
951-45000 FINES AND FORFEITS					
951-36-00-0000-45131 Library fines	300,000.00	12,482.70	102,118.41	197,881.59	34.04
951-36-00-0000-45132 Lost library items	40,000.00	1,868.00	12,085.00	27,915.00	30.21
Total FINES AND FORFEITS	340,000.00	14,350.70	114,203.41	225,796.59	33.59
951-46000 MISCELLANEOUS REVENUES					
951-00-00-0000-46110 Pooled cash and investment interest	0.00	-3,360.78	-3,360.78	3,360.78	0.00

42%

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 Periods: 6 through 6

Revenue Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

951 Library Joint Powers Authority

Account Number	Adjusted Estimate	Revenues	Year-to-date Revenues	Balance	Pct Rcvd
951-00-00-0000-46190	3,871.00	393.17	1,749.10	2,121.90	45.18
951-00-00-0000-46990	60,000.00	0.00	20,780.55	39,219.45	34.63
951-36-00-0000-46303	19,600.00	250.00	23,496.00	-3,896.00	119.88
951-36-00-0000-46309	10,000.00	0.00	10,000.00	0.00	100.00
951-36-00-0000-46916	0.00	2.03	83.44	-83.44	0.00
951-36-00-0000-46918	0.00	0.00	319.11	-319.11	0.00
951-36-00-0000-46923	0.00	0.00	654.60	-654.60	0.00
Total MISCELLANEOUS REVENUES	93,471.00	-2,715.58	53,722.02	39,748.98	57.47
951-49000					
951-00-00-0000-49122	15,755.00	0.00	15,755.00	0.00	100.00
951-00-00-0000-49191	18,018.00	0.00	18,018.00	0.00	100.00
Total OTHER FINANCING SOURCES	33,773.00	0.00	33,773.00	0.00	100.00
Grand Total	11,352,420.00	889,134.57	4,603,339.04	6,749,080.96	40.55

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Expenditure Status Report
 CITY OF SANTA CRUZ
 12/1/2009 through 12/31/2009

101 General Fund
 35 Library (City)

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Pct Used
101-35-51000 PERSONNEL SERVICES						
Total Regular full time	4,305,302.00	333,180.13	2,176,892.95	0.00	2,128,409.05	50.56
Total Regular part time	610,327.00	53,558.81	334,993.86	0.00	275,333.14	54.89
Total Overtime	0.00	0.00	1,820.89	0.00	-1,820.89	0.00
Total Termination pay	0.00	6,879.34	26,413.03	0.00	-26,413.03	0.00
Total Temporary	510,086.00	24,770.85	158,401.63	0.00	351,684.37	31.05
Total Other pay	0.00	20.64	526.16	0.00	-526.16	0.00
Total Special vacation pay	0.00	6,778.42	12,576.42	0.00	-12,576.42	0.00
Total Special sick leave pay	0.00	504.26	695.56	0.00	-695.56	0.00
Total Vehicle allowance	2,880.00	0.00	1,500.00	0.00	1,380.00	52.08
Total Retirement contribution	631,119.00	50,195.31	325,002.94	0.00	306,116.06	51.50
Total F.I.C.A.	61,081.00	1,151.27	8,026.64	0.00	53,054.36	13.14
Total Group health insurance	943,722.00	36,483.16	375,121.68	0.00	568,600.32	39.75
Total Group dental insurance	98,798.00	3,936.98	43,478.23	0.00	55,319.77	44.01
Total Vision insurance	17,895.00	716.47	7,918.94	0.00	9,976.06	44.25
Total Medicare insurance	58,208.00	5,443.81	59,440.93	0.00	-1,232.93	102.12
Total Group life insurance	2,673.00	114.33	1,251.82	0.00	1,421.18	46.83
Total Disability insurance	35,613.00	2,759.38	18,042.34	0.00	17,570.66	50.66
Total Unemployment insurance	12,291.00	1,064.20	6,790.18	0.00	5,500.82	55.25
Total Workers' compensation	219,856.00	18,354.95	119,261.77	0.00	100,594.23	54.25
Total Accrued vacation - period 13	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	7,509,851.00	545,912.31	3,678,155.97	0.00	3,831,695.03	48.98

Library - Fund 951
 Month-End Cash Balances

	July	August	September	October	November	December	January	February	March	April	May	June
FY 2010 Pooled cash	(908,343.59)	(797,637.50)	(752,924.76)	(597,787.31)	(558,459.72)	(707,533.76)						
FY 2009 Pooled cash	(1,028,955.46)	(397,327.61)	(356,999.20)	252,949.44	(714,416.36)	(711,714.61)	(812,054.05)	(668,015.42)	(595,048.05)	(543,669.74)	222,502.65	(667,431.15)
FY 2008 Pooled cash	555,177.28	285,993.39	362,222.74	452,678.88	381,688.89	348,644.68	414,873.10	180,026.54	267,117.50	988,379.63	877,239.75	65,274.00
FY 2007 Pooled cash	378,173.37	260,209.81	(47,065.07)	77,967.52	141,276.32	331,082.13	1,134,207.34	1,970,264.04	582,080.73	688,990.25	693,402.17	260,082.00

BUDGET CONSIDERATIONS: FOOD FOR THOUGHT

1. **Increased personnel costs:** We will need to deal with increased costs in certain areas. Increased personnel costs will include higher health care costs (we estimate a 8% increase) and some salary increases due to reclassification of some employees. At present we know of about \$8,000 in reclassification costs but anticipate it to be higher.

2. Changes required to maintain the current branch structure, including:

- **Supervision of satellite branches.** Current situation is untenable. Workload on the regional managers is too much and they are not able to provide sufficient level of supervision which affects staff morale and customer service. We will need to provide more direct supervision for the satellite branches
- **Adjustment of the branch schedules/hours** based on our experience and customer input.
- **An agreed direction regarding quality of library services** being offered and a baseline of services to be offered. We are facing the need for major facility and technology upgrades, materials for each branch, etc.. For example: We dropped leased books at Garfield Park and now the public is unhappy they are not getting enough new books. Adding back leased books at GP means cutting someplace else. What are acceptable tradeoffs? What is not acceptable? What is sustainable?

If we were not anticipating a reduction of close to \$500,000 from reduced property taxes, we probably could have squeaked by another year but I am afraid we are still facing extremely difficult choices which will affect patrons and staff alike. Given the revenue and expense outlook, we are going to need to find ways to reduce expenses or find creative ways to increase revenues (or a combination of both). Realistically, cutting expenses is more likely. .

LJPB Budget Board Schedule for Fiscal Year 2010/2011

Milestones	Owner	Date
Review long term financial projections	Landers/Dilles	Feb or March LJPB
Board hears public input on service and budget priorities;	Board	March LJPB
Board reviews list of budget needs	Director	March LJPB
Board provides inputs on service and budget priorities to Director	Board	March LJPB
Operating and capital budget draft presented to Board for discussion and inputs	Director	May LJPB
Final budget draft presented to Board for approval	Director/Board	June LJPB
Board adopts budget	Board	By end June '09

DATE: January 25, 2010
TO: Library Joint Powers Board
FROM: Teresa Landers, Library Director
SUBJECT: Suspension of Security System

I. Background and Discussion

1. It is an antiquated system that is unreliable and very labor intensive for staff:
 - When processing new items, staff (or the vendor with whom we contract) must adhere a pocket and security target to each book
 - At checkout and check in, staff is required to open each book and put in or remove the date due card
2. It is expensive to operate:
 - Date due cards cost \$8500 in FY08/09. We will not need to order any in 09/10 but will in 10/11.
 - The total cost of maintaining the security system including supplies is about \$16,000 per year.
 - This does not take into account staff time spent processing and putting cards in and out.
3. At current busyness per hour rates, we need to find a way for staff to work more efficiently and to take some of the pressure off repetitive motion activities.
4. We have already started putting barcodes on the outside of books to facilitate self check. As time goes on there will be no need to open books for checkout and check in with barcodes on the outside. We have applied for a subsidized employment program to re-barcode materials that are currently getting checked in. We hope to have several people for 5 months and they will do as much as they can. In the future we will look for additional opportunities like this to help with this ongoing project. We hope that within 2-3 years of passive rebarcoding we will reach a point where very few items have barcodes on the inside.
5. The current security system is a major impediment to self check both in terms of training the public and in the type of equipment that is needed for the public to desensitize their own materials. This is in large part due to the antiquated security system we are using.
6. We can still have popular DVDs in locked cases with a fairly simple mechanism available at self check out stations.

7. Self check machines will issue receipts (or email a receipt to the patron). We will need to equip staff check out machines with receipt printers at about \$200 each or about \$2,000.
8. We will no longer need to store the date due cards or sort them. This will save space and staff time.
9. With the money saved from not doing security we can replace a lot of lost items.
10. We did a basic loss rate study to get a baseline and our loss rate is about 1,000 items per year or less than 1% of the total items in the collection. We will do another study one year after suspending use of the security system. If the rate has gone up considerably we will investigate alternate security solutions. We can also use savings from not using the system for the purchase of replacement materials.
11. In most situations we will just turn off the security gates. In locations where the security gates pose a barrier to entry such as at Central we will remove the post from the center. This will make entrance to our facilities more inviting.
12. In brief conversations with members of the public at various town halls and focus groups, the public has responded quite favorably to this decision.

II. Recommended Action

That the JPB support the Library's decision to suspend use of the current materials security system to facilitate self check, save money and facilitate efficiency and staff health and safety.

PARKING LOT ITEMS

TOPIC	RESOURCES/ RESPONSIBILITY	DATE
By laws review	JPB	February 2010
Discuss budget priorities for coming year provide staff direction	Director and JPB	March 2010
Consider draft budget	JPB	May 2010
Adopt final budget	JPB	June 2010
Volunteer Philosophy and Strategy Review	JPB	Summer 2010
Board Self evaluation	JPB	December
Mid year budget adjustment review	JPB and Director	December
Budget projections	Director	January
Review Annual Audit	Director and JPB	January
Appoint citizen members	JPB	January
Annual election of officers	JPB	January

DATE: January 25, 2010
TO: Library Joint Powers Board
FROM: Teresa Landers, Library Director
SUBJECT: CONSIDERATION OF ADOPTING A RESOLUTION SUPPORTING THE LOCAL TAXPAYER, PUBLIC SAFETY, AND TRANSPORTATION PROTECTION ACT OF 2010.

I. BACKGROUND AND DISCUSSION

Please refer to the Santa Cruz City Council Agenda Report from September 29, 2009 which provides excellent background and discussion of this issue.

This past year the Library set aside approximately \$480,000 for a possible state take-away of property tax funds. The final amount was \$297,000 which was securitized so that no loss will be suffered this year. Since we are already operating from a deficit position, and expect a reduction in property tax revenues next year, losing this amount to the state would be catastrophic for the library and would require cuts in service and/or materials.

The Resolution attached to this Staff Report would reflect that the Library Joint Powers Board supports endorses and supports the Local Taxpayer, Public Safety, and Transportation Protection Act of 2010 and authorizes the listing of the support of the measure by the Library Joint Powers Board in all public documents.

II. RECOMMENDED ACTION

That the Joint Powers Board adopt the Resolution attached to this Staff Report that would support the Local Taxpayer, Public Safety, and Transportation Protection Act of 2010.

III. ATTACHMENTS

Attachment A: City Council Agenda Report
Attachment B: Article from San Jose Mercury News.



CITY COUNCIL AGENDA REPORT

DATE: September 29, 2009

AGENDA OF: October 13, 2009

DEPARTMENT: City Council

SUBJECT: State Constitutional Amendment Protecting Local Government Revenues –
Resolution of Support. (CN)

RECOMMENDATION: Resolution supporting the advancement of a State Constitutional Amendment proposed by the League of California Cities that will protect local government, transit and transportation funding from state government takeaways.

BACKGROUND: Despite strong voter support of keeping local tax dollars local, the California state government continues to regard these revenues as a fix for state budget shortfalls. This approach is exemplified by the most recent state budget, which transferred to state coffers \$2 billion in local property tax, \$2 billion in local redevelopment funds (despite a Superior Court ruling that this type of transfer is unconstitutional), \$910 million in transit funds and more than \$1 billion of local governments' share of the Highway User Tax, thereby breaking an 86-year tradition of sharing proceeds between state and local governments and transit authorities.

With the flagging economy, it need not be stated just how devastating these additional local revenue takeaways are to our city and to all cities throughout California. Each year, unlike the state, we make the tough choices necessary to deliver a balanced budget. In this process, we are continually challenged by the lack of an enforceable check on the state's power to divert or borrow local revenues.

DISCUSSION: The League of California Cities (League), which has been advocating vigorously on behalf of local government throughout the state's budget debate, has crafted a constitutional amendment to make this correction. The amendment was unanimously endorsed at the League's recent annual meeting and will be filed with the Secretary of State by mid-October for inclusion on the November 2010 ballot.

The proposed amendment will prevent the State Legislature from, among other provisions:

- Taking or borrowing local taxes;
- Borrowing the property tax allocated to cities, counties, and special districts;
- Using property tax or vehicle license fee revenues to reimburse local governments for a state mandate;
- Borrowing or taking Highway Users' Taxes or using the local share for state projects;

- Borrowing or taking revenues from the Public Transportation Account or using these funds for purposes other than transportation;
- Borrowing or taking the Sales Tax on Gasoline (Prop 42); and
- Requiring Redevelopment agencies to make a payment to a state or local agency with tax increment revenues it has received.

The constitutional amendment will check the state's unfair taking of local revenues. For the sake of local communities and the long term fiscal health of the state at large, the state government needs to adhere to sound budgetary principles and be prevented from tapping local governments' already limited resources.

The City anticipates support for this measure from others affected by the state takeaways, including schools districts, counties, redevelopment agencies and transit and other special districts. Santa Cruz wholeheartedly supports the League of California Cities' efforts to advance a constitutional amendment that will protect local government revenues.

FISCAL IMPACT: There is no fiscal impact.

Submitted by:

Cynthia Mathews
Mayor

Don Lane
Councilmember

Tony Madrigal
Councilmember

Attachments: Resolution
Fact Sheet

CALIFORNIA BUDGET CRISIS

Proposition would protect local revenue

League of cities begins drive to keep state's hands off money raised at home

By Steven Harmon

sharmon@bayareanewsgroup.com

SACRAMENTO — Angered by a series of raids on local funds by state government, a coalition of local government groups kicked off a signature-gathering effort Wednesday with a ballot measure to thwart any future raids.

Continued state raids and borrowing of local government funds have put vital local services at risk, said Chris McKenzie, executive director of the League of California Cities and co-chair of Californians to Protect Local Taxpayers and Vital Services.

"This measure would put a stop to state raids and borrowing of local taxpayer dollars and protect vital local services," McKenzie said. "We believe there is no more important reform than untangling the messy relationship between the state and local governments."

Supporters, who must gather 694,354 valid signatures to qualify it for the November 2010 ballot, have vowed to collect 1.1 million signatures with a combined volunteer and paid signature-gathering campaign.

Gov. Arnold Schwarzenegger and lawmakers infuriated many city and county leaders earlier this year by suspending a law that forbids raids on local funds, borrowing \$2 billion in tax

BALLOT MEASURE PROVISIONS

The proposed measure would prohibit the state from:

- Borrowing local government property tax funds.
- Borrowing or taking gasoline taxes dedicated to transportation and transit improvements and services, including the state sales tax on gasoline.
- Taking locally levied taxes, including parcel taxes and sales taxes.
- Raiding redevelopment funds or shifting redevelopment funds to other state purposes.

See RAIDS, Page 8

Raids

Continued from Page 1

revenue from local governments.

San Jose Mayor Chuck Reed has slammed the state for balancing its budget on the backs of local government. The budget Schwarzenegger signed July 28 to close a \$23 billion deficit included provisions to borrow \$20 million in property tax from the city and take \$75 million from the San Jose Redevelopment Agency, which abruptly laid off almost a quarter of its staff in response.

And this week, Schwarzenegger was reported to be considering another plan to sidestep an existing ban on raids of transportation funds. The plan would eliminate the state sales tax on gasoline and replace it with a new excise tax, to be diverted into the general fund.

Critics said the move would "rob" public transit agencies of hundreds of millions of dollars, fitting in with the state's growing thirst for local revenues as it faces another round of painful budget cuts.

"California voters have repeatedly supported statewide measures that dedicate the gas taxes we pay at the

pump for transportation improvements," said Jim Earp, executive director of the California Alliance for Jobs. "Despite this, year after year the Legislature exploits every loophole it can find to borrow or outright raid these critical funds.

"This measure will once and for all protect gas taxes from future raids," he added, "and insure they are used to improve our roads, highways and transit systems — just like the voters intended."

Mercury News staff writer John Woolfolk contributed to this report. Reach Steven Harmon at 916-441-2101.

**RESOLUTION IN SUPPORT OF THE LOCAL TAXPAYER, PUBLIC SAFETY, AND
TRANSPORTATION PROTECTION ACT OF 2010**

WHEREAS, California voters have repeatedly and overwhelmingly passed separate ballot measures to stop State raids of local government funds, and to dedicate the taxes on gasoline to fund transportation improvement projects; and

WHEREAS, these local government funds are critical to provide the police and fire, emergency response, parks, libraries, and other vital local services that residents rely upon every day, and gas tax funds are vital to maintain and improve local streets and roads, to make road safety improvements, relieve traffic congestion, and provide mass transit; and

WHEREAS, despite the fact that voters have repeatedly passed measures to prevent the State from taking these revenues dedicated to funding local government services and transportation improvement projects, the State Legislature has seized and borrowed billions of dollars in local government and transportation funds in the past few years; and

WHEREAS, this year's borrowing and raids of local government, redevelopment and transit funds, as well as previous, ongoing raids of local government and transportation funds, have lead to severe consequences, such as layoffs of police, fire and paramedic first responders, fire station closures, stalled economic development, healthcare cutbacks, delays in road safety improvements, public transit fare increases and cutbacks in public transit services; and

WHEREAS, State politicians in Sacramento have continued to ignore the will of the voters, and current law provides no penalties when state politicians take or borrow these dedicated funds; and

WHEREAS, a coalition of local government, transportation and transit advocates recently filed a constitutional amendment with the California Attorney General, called the Local Taxpayer, Public Safety, and Transportation Protection Act of 2010, for potential placement on California's November 2010 statewide ballot; and

WHEREAS, approval of this ballot initiative would close loopholes and change the Constitution to further prevent State politicians in Sacramento from seizing, diverting, shifting, borrowing, transferring, suspending or otherwise taking or interfering with tax revenues dedicated to funding local government services, including redevelopment, or dedicated to transportation improvement projects and mass transit.

THEREFORE, BE IT RESOLVED that the Santa Cruz Public Libraries Joint Powers Board formally endorses the Local Taxpayer, Public Safety, and Transportation Protection Act of 2010, a proposed constitutional amendment.

BE IT FURTHER RESOLVED that we hereby authorize the listing of the Santa Cruz Public Libraries Joint Powers Board in support of the Local Taxpayer, Public Safety, and Transportation Protection Act of 2010 and instruct staff to fax a copy of this resolution to campaign offices at 916.442.3510.

PASSED AND ADOPTED this ___ day of _____, 2009 by the following vote:

