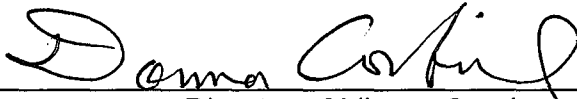


**Notice of Regular Meeting of the
Board of Library Trustees
of the City of Berkeley**

Notice is hereby given that a regular meeting of the Board of Library Trustees of the City of Berkeley is hereby called to be held on **Wednesday, April 18, 2007**, commencing at **7:00 p.m.** at the **South Branch Library, 1901 Russell Street, Berkeley, California.**

Date Issued: April 13, 2007



Director of Library Services

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To request a meeting agenda in large print, Braille, or on cassette, or to request a sign language interpreter, assistive-listening device or other accommodation for the meeting, call 510-981-6195 (Voice) or 510-548-1240 (TDD). Providing at least five (5) working days' notice prior to the meeting will help to ensure availability.

Please refrain from wearing scented products at public meetings.

For further information, call 510-981-6195.



BERKELEY PUBLIC LIBRARY BOARD OF LIBRARY TRUSTEES

Regular Meeting
April 18, 2007

AGENDA
7:00 p.m.

South Branch Library
1901 Russell Street

*Please refrain from wearing scented products at public meetings.
The Board of Library Trustees may act on any item on this agenda.*

I. CALL TO ORDER

II. PUBLIC COMMENTS (7:00 – 7:30 p.m.)

(Proposed 30-minute time limit, with speakers allowed 3 minutes each)

III. APPROVAL OF AGENDA

IV. CONSENT CALENDAR

- A. Approve minutes of March 21, 2007 regular meeting
- B. Approval to accept grant funds in the amount of \$62,141 for FY2006/2007 and to apply for the FY2007/2008 California Library Literacy Services grant program for approximately \$62,000

V. REPORTS FOR DISCUSSION AND POSSIBLE ACTION

- A. Discussion from the ad-hoc committee on the process and criteria to appoint Board of Library trustees (Oral Report)
- B. Discussion and recommendation to the City Council on appointment of trustee to serve a four-year term commencing May 14, 2007 to include recommending reappointment of Trustee Susan Kupfer or appointment of other applicant
- C. Preliminary budget presentation and follow-up on the budget workshop in preparation for approval of the FY2008/09 Library budget
- D. Adopt a resolution to approve conducting a public hearing to discuss the FY2008 & 2009 Library budget on May 9, 2007

VI. REPORTS FOR INFORMATION

- A. Report from library employees and unions, discussion of staff issues (15 minutes)
 - 1. Comments / responses to reports in packets and recent processes taking place at the Library
- B. Berkeley Public Library's South Berkeley Community's Library Needs and Ed Roberts Campus (ERC) Discussion Group Report
- C. April 2007 Monthly Report from Library Director Donna Corbeil
 - 1. *Personnel*
 - a. Update on Circulation Services Manager and Deputy Director Interview Process
 - 2. *Library Development*
 - a. ERC / Southwest Berkeley

- b. Self-Check / RFID / Checkpoint Update
- 3. *Professional Activities*
- 4. *Programs, Services and Collections*
- D. Update on the proposed stucco repairs at the Central Library
- E. Information regarding presentation by Stephen Abram on the future of libraries, i.e. Library 2.0
- F. Library events: Flyers and press releases for various Library programs

VII. AGENDA BUILDING

A special budget meeting will be held at 7:00 p.m. on Wednesday, May 9, 2007 at the **West Berkeley Senior Center**, 1900 Sixth Street, Berkeley.

Next regular meeting will be held at 7:00 p.m. on Wednesday, May 16, 2007 at the South Branch Library, 1901 Russell Street, Berkeley.

- A. Tracking Chart

VIII. ADJOURN

Berkeley Public Library Board of Library Trustees
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Regular Meeting
March 21, 2007

Minutes
7:00 p.m.

South Branch Library
1901 Russell Street

I. CALL TO ORDER

The regular meeting of March 21, 2007 was called to order at 7:03 p.m.

Present: Trustees Laura Anderson, Susan Kupfer, Ying Lee, Darryl Moore, and Terry Powell

Absent: None

Also present: Director of Library Services Donna Corbeil, Acting Deputy Director Linda Perkins, Library Financial Manager Beverli Marshall, and Administrative Secretary Alisa Somera

II. PUBLIC COMMENTS

There were two speakers: Reed Schmidt with the Berkeley Public Library Foundation, and Ruth Grimes who introduced herself as the Friends Board Member Liaison.

III. APPROVAL OF AGENDA

R07-19 Moved by Trustee Lee, seconded by Trustee Moore, to approve the agenda as amended.
Motion carried unanimously.

IV. CONSENT CALENDAR

Trustee Lee requested that Item IV.C (Ratification of FY2006 expenditures in excess of \$50,000) be moved for Discussion and Possible Action.

Trustee Anderson requested that Item IV.B (Recommended changes to service fees for overdue materials) be moved for Discussion and Possible Action.

R07-20 Moved by Trustee Lee, seconded by Trustee Anderson, to approve the Consent Calendar as amended. Motion carried unanimously.

R07-21 Approved minutes of February 21, 2007 regular meeting.

R07-22 Authorization to apply for The Big Read grant for the program period of September through December 2007.

R07-23 Authorization to close the Tool Lending Library for annual tool maintenance from April 16 through 28, 2007 and reopening on May 1, 2007

Consent Items Moved for Discussion

B. Recommended changes to service fees for overdue materials

Trustee Anderson noted that the resolution did not coincide with the information and recommendation that was in the staff report. After some discussion it was decided that the last portion of the resolution heading needed to be stricken to reflect the correct wording: "Authorization to change the charge or service fees for overdue materials and Interlibrary Loan materials."

Trustee Anderson also noted a typo in the title of the resolution with an extra "r" in front of "fee", which needed to be corrected.

R07-24 Moved by Trustee Anderson, seconded by Trustee Lee, to adopt the amended resolution that gives authorization to change the charges or service fees for overdue materials and Interlibrary Loan materials. Motion carried unanimously.

C. Ratification of FY2006 expenditures in excess of \$50,000

Trustee Lee voiced her concern over the number of items that did not meet the standard that was established by the Board that any supplies contract over \$50,000 must receive Board approval. Ms. Corbeil explained that these amounts were cumulative and that staff had approved smaller amounts without noting that the total amount paid to certain vendors was above the set \$50,000. Beverli Marshall, Library Financial Manager, explained that at the end of FY2006 the proper reports were not run due to the resignation of the previous director at the end of the fiscal year.

Trustee Lee wanted to know whether there was a way to show how much is being spent on each of these vendors without having to run reports on each vendor. Ms. Marshall stated that the accounting system is set up in a way that a report needs to be run in order to find out how much money was spent year-to-date. Trustees Kupfer and Moore suggested that reports be run monthly. Ms. Marshall explained that this year they've already projected their expenditures and the Board approved the spending in September based on those estimated costs. In the future, if those costs do appear to be running over the amount already approved, staff will come back for approval at that time. Trustee Kupfer asked that the reports be run monthly so that the Board could be apprised of issues that needed to be addressed.

Trustee Anderson asked whether the amounts they approved in September 2007, when special authorization was granted, were all amounts over \$50,000. Ms. Marshall replied that in September the Interim Director did not have authority to approve any expenditure; at this time the Director does have authority to approve expenditures for services up to \$25,000 and \$50,000 for supplies. Trustee Anderson then asked what the practical path-forward should be regarding authorization of expenditures. Ms. Marshall suggested that with the approvals in place now, staff would come back with projections of costs that may exceed the Director's approval and ask for the Board's authorization prior to spending those amounts. Trustee Powell added that she would like to see staff come back mid-budget with an update of expenditures. Ms. Marshall agreed.

It was agreed that there will be a more stringent plan in place to track expenditures and to ensure that staff will come before the Board prior to any item exceeding budget.

R07-25 Moved by Trustee Lee, seconded by Trustee Moore, to adopt the resolution ratifying expenditures made in FY06 by staff to vendors that exceeded the Director's Board authorized purchasing authority of \$50,000 per vendor. Motion carried unanimously.

V. REPORTS FOR DISCUSSION AND POSSIBLE ACTION

A. Delegation of authority to Director of Library Services to appoint the most qualified candidate to the position of Deputy Director of the Berkeley Public Library and to determine an appropriate start date, salary step, and otherwise finalize the appointment

Trustee Kupfer introduced the item and discussed the prior action taken by the Board that gave the Director authority to appoint new employees, but for the Deputy Director position many of the Trustees felt it was important that the Board be more involved in the process. Trustee Kupfer explained it was necessary to give the Director authority because of the timeline and necessity to fill the position as soon as possible. Trustee Kupfer asked which Trustees wanted to sit on the executive panel for the Deputy Director interviews, Trustees Lee and Kupfer volunteered to participate.

Ms. Corbeil spoke on the range of applicants received and that four have been asked back to interview. She also spoke on the timeline for the interview day and informed the Board of the "meet and greet" taking place in the morning, which the Trustees and staff are invited to attend in order to

informally meet the candidates. After the interview process Ms. Corbeil said she would share information about the interviews with the Board.

Trustee Anderson requested that the resolution be amended to include the phrase "... the authority to develop the process ..."

R07-26 Moved by Trustee Anderson, seconded by Trustee Lee, to adopt the amended resolution delegating authority to Director of Library Services to develop the process and appoint the most qualified candidate to the career position of Deputy Director of Library Services for the Berkeley Public Library and to determine an appropriate start date, salary step, and otherwise finalize the appointment. Motion carried unanimously.

B. Proposed Berkeley Public Library budget priorities for FY2008

Trustee Moore went over the background of the item. He and Trustee Powell met to discuss budget priorities for FY2008 for the Board to consider. Trustees Moore and Powell took last year's priorities and figured out which ones were completed and which they would like to have continued. The priorities they recommended were: 1) to continue to pursue restoring hours of service at the Branches; 2) to continue to pursue the potential of moving South Branch to the Ed Roberts Campus (ERC); 3) to continue to pursue the implementation of WiFi at all branches, including Central; 4) continue to identify and meet the needs of Southwest Berkeley with a bookmobile or other collaborative action; and 5) to add two planning studies, one for services and one for facilities, including community engagement.

Trustee Lee voiced her agreement with the priorities but had a concern on the shelving backlog and staffing issues related to the priority to add positions recommended by the Shelving Task Force during FY2007, which the other Trustees believed to have been completed and was dropped from the FY2008 priorities. Ms. Corbeil indicated that the number of vacancies and the fact that there is no permanent manager in place, has contributed to the backlog of shelving. Ms. Corbeil stated that she has met with the Supervising Library Assistants in Central and the acting General Services Manager to come up with short-term solutions and agreed to give the Board an update on the situation once the new Circulation Services Manager is hired so that their input can assist in any next steps that may be considered for the long-term.

Trustee Lee relayed that she supported any changes, but wanted to ensure that any improvements implemented did not come at the expense of the presently well-functioning Library and that standards be upheld.

Trustees Moore and Powell stated that the priorities listed were not in any particular order or rank. The priorities were given as a group, to assist the Director in forming the budget work plan for the upcoming year and are inter-related in the formation of the budget.

There was a discussion between Trustee Kupfer and Ms. Corbeil as to the placement of WiFi and where it fits in to the budget. Ms. Corbeil will confirm if the funding is in the current year budget or if it needs to be in next year's budget.

Trustee Kupfer commented on the planning studies, both for services and for facilities, and her praise on the inclusion of the community during the process. She also pointed out the three separate issues: ERC, Southwest Berkeley needs, and the bookmobile. She suggested that Ms. Corbeil come back in the next three months or so with options and funding possibilities for a move to the ERC. There was some discussion as to whether this should be added as a priority, but Trustee Lee stated that it should not be added until the ERC discussion group has had a chance to come back to the Board with their findings, which will include the input from a community meeting and financing possibilities.

R07-27 Moved by Trustee Moore, seconded by Trustee Powell, to adopt the recommended FY2008 budget priorities. Motion carried unanimously.

C. Budget Workshop in preparation for development of the FY2008 and FY2009 Library budget

Ms. Corbeil began by pointing out two corrections to the report. One was the Organizational Chart Narrative attachment, which did not have all the departments included, so a revised version was handed out at the meeting. Second correction was in page 3, paragraph 5 of the report, which says "...FY2009 negotiations will occur..." and it should be FY2008. Ms. Corbeil explained that some of the information given in the report or attached to it is in response to previous questions and/or requests for more detailed information.

Trustee Lee asked for clarification about the \$35,000 under Equipment Maintenance – Checkpoint Maintenance Contract on the first page of the Expenditure Detail Sheet and the \$60,000 under Materials & Supplies - Checkpoint Systems on the second page. She wanted to know why the \$35,000 line did not appear on the February version. Ms. Corbeil explained that the \$60,000 is for the materials and supplies used for processing, tags, and cases for new books and CDs that come into the library system, not for the labor involved. She further explained that the \$35,000 is for a proposed contract for ongoing maintenance for the equipment and hardware, which was placed there as a placeholder. An item regarding this maintenance contract will be brought before the Board and no monies will be expended until the expense is approved by the Board.

Trustee Powell had questions regarding whether the intermittent staffing can be shown on a separate line item so that the Board can differentiate between intermittent and hourly levels. Ms. Marshall explained to her that the accounting system does not differentiate between the two and since we are the only City department who has these part-time career employees we have not been able to find a solution to this issue and we cannot separate them in the accounting system as they are not coded differently. What is needed is a third category for 15-hour employees.

It was determined that the Trustee Powell would work with Ms. Marshall to would send a letter to the City Manager requesting an element object be created to track these personnel expenditures.

Trustee Lee commented on item #8 (Youth Employees) and stated that she believed historically this was one way for the Library to expand its diversity program, as well as encourage youth to pursue librarianship as a possible career.

Regarding the "All Other Funds" section of the Personnel Budget Modification sheet, Ms. Corbeil said that they are anticipating an increase in direct loans revenue. These funds are used to pay for the delivery of materials between the various agencies. Ms. Marshall pointed out that we get state funds for the direct loan and ILL program, which includes Link+ and the estimates were based on those. BPL has had an increase in usage with more people taking advantage of these loan programs, which has resulted in an increase in our revenue from that program. That increase has also created in an increase in workflow with more items going in and out through deliveries. This is why it is being recommended that a new .75 position be hired to run a second trip from Tuesday through Friday and an additional run on Saturdays. The cost would be nominal after the increase in revenue and there is no need for an additional vehicle.

The last personnel item being recommended is the .50 Literacy Assistant who is a graduate from the Literacy program and is an advocate for the students. This individual has been working for years, but has been getting paid as an hourly employee. This change will allow her to be a half-time benefited employee being totally funded by the grant. If the grant were to go away then the Board would determine whether to continue funding the position through Library tax or allow it to lapse. Ms. Corbeil and Ms. Marshall both relayed that they do not anticipate this grant going away since the State is extremely committed to adult literacy.

The "Items Not Recommended at This Time" section includes items that were suggested by staff, but current funding will not allow. Ms. Corbeil included all suggestions from staff for the Board to review since they may want to revisit them should funding become available.

For the last few years the Foundation has given the Library \$100,000 per year for three years, for a total of \$300,000. This was part of a specific fundraising campaign that was in response to the Library's material budget being cut in anticipation of the shortfall. These payments were never meant to be permanent and were done in the hope that the financial situation would improve and the Library would then take over the \$100,000 budget. The proposed \$50,000 material budget increase is a step toward that. The second half of the \$100,000 is found under the "Items not recommended at this time" section. Trustee Powell pointed out that in the YTD expenditures it says that the Library is at 44% of their library materials, but Ms. Corbeil clarified that we've actually already spent a much larger percentage of the budget and anticipate spending all of it by the end of the year. The percentage indicates actual funds spent but not encumbered.

The final attachment is a listing of the amounts that have been requested from the Friends of the Berkeley Public Library. This is not an itemized list and is being given as a summary of what types of programs are included.

The Board praised Ms. Corbeil and Ms. Marshall on creating such a readable report that is easy to understand and follow.

VI. REPORTS FOR INFORMATION

A. Report from library employees and unions, discussion of staff issues

1. Continuation of Checkpoint report
2. Additional comments / responses to reports in packet

Andrea Segall spoke about the previous reports and introduced herself as a representative of SEIU, 1021. She spoke about the elimination of a librarian position in Reference and concerns the Union has had about the number of supervising positions as opposed to line staff. Ms. Segall also touched on RFID and the Union's ongoing concern that any money being allocated elsewhere is money being taken away from union workers.

Anes Lewis Partridge, Business Agent for SEIU 1021, wanted to make an announcement that, with the formation of 1021, she has been reassigned to be the Chief Negotiator for Solano County area. She also announced that her replacement will be Aaron "AJ" Jackson who is an experienced Business Agent coming from Alameda County.

B. Berkeley Public Library's South Berkeley Community's Library Needs and Ed Roberts Campus (ERC) Discussion Group Report

Trustee Powell explained that this is a monthly status report on what they've been talking about in their discussion group.

C. Monthly Report, February 2007, from Library Director Donna Corbeil

- Ms. Corbeil reported on two staff committees that have been recently formed. The first is the ERC / Southwest Berkeley Committee, which has met once to discuss the two Requests for Proposals (RFP) to be written to solicit consultants to assist with 1) the architectural services at the Ed Roberts Campus and 2) Southwest Berkeley's library needs assessment. The first RFP (architectural) has been developed and will be going out tomorrow. The second RFP (needs) should be going out within the next two weeks.

The second staff committee is the RFID/Checkpoint/Self-Check Task Force that will be formed to evaluate all of the issues encompassing RFID. The task force will have its first meeting within the next week or so. There will be staff volunteers and also members suggested by the union; at least two members will be from the union's suggested list.

- Ms. Corbeil announced the retirement of Elizabeth Overmyer, who is the Acting Children's Services Manager, in May 2007. Ms. Corbeil expressed how much Ms. Overmyer will be missed, not just in the Berkeley Public Library but also in the profession.
 - D. Report on Collection Development Standards, Processes, Allocations and Electronic Resources
 - E. Report on Northern California Grantmakers grant for Children's Services
 - F. Library Information Technology FY2008 Budget Estimate
 - G. Library events: Flyers and press releases for various Library programs

VII. AGENDA BUILDING

- RFID Task Force report
- Update on the Deputy Director
- Discussion with City Attorney on evaluating the public comment period policy in light of the changes at Council. Trustee Moore would like to have the City Attorney attend the meeting to talk to the Board about the policy.
- Trustee Moore announced that Kriss Worthington and Betty Olds were appointed to serve on the Ad-hoc Committee for the development of a process to fill Library Trustee vacancies. Trustees Kupfer and Lee have already been appointed.

VIII. ADJOURNMENT

R07-28 Moved by Trustee Moore, seconded by Trustee Powell, to adjourn the meeting at 9:07 p.m.
Motion carried unanimously.



BERKELEY PUBLIC LIBRARY

CONSENT CALENDAR

April 18, 2007

TO: Board of Library Trustees

FROM: Linda Sakamoto-Jahnke, Library Literacy Coordinator

SUBJECT: Approval to accept grant funds in the amount of \$62,141 for FY2006/2007 and to apply for the FY2007/2008 California Library Literacy Services Grant Program for approximately \$62,000

RECOMMENDATION

Adopt the attached resolution authorizing the Library Services Director to accept the CLLS grant funds in the amount of \$62,141 for FY2006/2007, to apply for the FY2007/2008 CLLS grant program for approximately \$62,000, and to accept the grant if awarded.

INTRODUCTION

On July 14, 2006 the California State Library informed the Library of the approval for their initial baseline award of \$20,000 and on October 26, 2006 the Library was informed of the final payment of \$42,141, which amounts to a total award of \$62,141 for FY2006/2007.

The California State Library has announced their May 11, 2007 deadline for the FY2007/2008 CLLS Adult Literacy and Families for Literacy funding application.

FISCAL IMPACTS

This annual grant provides baseline amounts for CLLS approved programs, including Adult Literacy and Families for Literacy, which reflects the importance of each library having enough funds to provide at least a minimum level of local literacy staffing and service. The amount of funding is determined by a CLLS funding formula based on: a per capita amount per adult learner served at your library in the previous fiscal year and a match on local funds raised and expended for adult literacy services—reflecting a commitment to a continuing State/Local partnership, and to provide an incentive for increased local support for adult literacy.

BACKGROUND

The Berkeley READS program was seeded in 1987 with CLLS funding and has continued to receive this grant on a fiscal year schedule. The Library Tax funds 1 FTE Library Literacy Coordinator, 1 FTE Library Specialist I (Program Assistant) and .50 PT Library Assistant. In previous fiscal years, the CLLS grant funded one or two contractual or project staff. Since the beginning of fiscal year 2005/06 with an increase in the number of students served, CLLS funding has been dedicated to adult and family literacy staffing positions including: Family



Literacy Coordinator; Computer Lab Coordinator; Drop-In/Outreach Tutor; Small-Group Instructor; Student Advocate/Learner-on-Staff; and a Tutor Trainer. The amount of CLLS grant funding for fiscal year 2006/07 reflected the increase in client population; the funding increased \$15,000 from the previous \$47,000 to current \$62,000. Two additional staff members including a Learner-On-Staff assistant and English Literacy for Immigrants instructor were sponsored by an AmeriCorps partnership and will continue in the 2008 calendar year. In partnership with Berkeley City Community College, a Cal-Works (federal work/study program) student will be sponsored for 20 hours a week as a member of the literacy staff for the remainder of the fiscal year.

CURRENT SITUATION AND ITS EFFECTS

The CLLS grant for FY2007/2008 is predicted to be maintained at \$62,000 (depending on their funding formula) and will continue to be dedicated to funding six part-time, hourly staff positions which provide direct-client service in meeting the needs of the 200+ Berkeley READS adult and family literacy students and those of community outreach partner sites. For FY2007/08, three additional staff positions will be sponsored by AmeriCorps and Cal-Works Federal Work/Study Program. Operational expenses will be supported by donations from private individuals and groups such as the Friends of the Library.

FUTURE ACTION

No future action is necessary.

DOCUMENTS ATTACHED

Resolution

CONTACT PERSON

Linda Sakamoto-Jahnke, Library Literacy Coordinator

(510) 981-6275

RESOLUTION NO.: R07-___

AUTHORIZING THE LIBRARY SERVICES DIRECTOR TO ACCEPT GRANT FUNDS IN THE AMOUNT OF \$62,141 FOR FY2006/2007 CALIFORNIA LIBRARY LITERACY SERVICES (CLLS) GRANT PROGRAM AND TO APPLY FOR THE FY2007/2008 CLLS GRANT PROGRAM FOR APPROXIMATELY \$62,000

WHEREAS, the California Library Literacy Services (CLLS) Grant Program seeded the Berkeley READS adult and family literacy program in 1987; and

WHEREAS, the CLLS program has continued to fund the literacy program through an annual grant; and

WHEREAS, the grant amount is determined by a CLLS funding formula and is available to those libraries which reflect a commitment to a continued State/Local partnership and support for adult literacy; and

WHEREAS, the CLLS program awarded the Berkeley Public Library a total of \$62,141 for FY2006/2007; and

WHEREAS, the California State Library has announced the May 11, 2007 deadline for submission of the FY2007/2008 CLLS grant application.

NOW, THEREFORE, BE IT RESOLVED that the Board of Library Trustees of the City of Berkeley hereby authorizes the Director of Library Services to accept the FY2006/2007 grant funds awarded by the California Library Literacy Services Grant Program in the amount of \$62,141.

BE IT FURTHER RESOLVED that the Board of Library Trustees of the City of Berkeley hereby authorizes the Director of Library Services to apply for the FY2007/2008 California Library Literacy Services Grant Program for approximately \$62,000 and to accept the amount when awarded.



BERKELEY PUBLIC LIBRARY

DISCUSSION CALENDAR

April 18, 2007

To: Board of Library Trustees

From: Terry Powell, Board of Library Trustee

Subject: Discussion and recommendation to the City Council on appointment of trustee to serve a four-year term commencing May 14, 2007 to include recommending reappointment of Trustee Susan Kupfer or appointment of other applicant

BACKGROUND

The Board of Library Trustees consists of five members appointed by the City Council upon recommendation of the Board of Library Trustees. Board members are appointed for terms of four years, serve without compensation, and must be Berkeley residents.

Trustee Susan Kupfer's first four year term will end on May 13, 2007. The Board may choose to recommend to the City Council reappointment of Trustee Kupfer to a second term or select an applicant. The appointment will be for the period ending May 14, 2011.

FISCAL IMPACT

There is no fiscal impact.

CURRENT SITUATION AND ITS EFFECTS

The Board may either recommend reappointment of Trustee Kupfer to a second term or select a new person to recommend to the City Council for this vacancy. Trustee Kupfer has indicated a willingness and desire to serve a second term. The Board will consider applicants that have submitted an application and supplemental questionnaire with the City Clerk. Interested applicants may access the application form and a supplemental questionnaire by contacting the City Clerk or by downloading it from the City's website. The deadline for submittal was 2:00 p.m. on April 18, 2007.

Consideration of new applicants for this vacancy will occur on April 18, 2007 at the regular Board of Library Trustees meeting. Interested applicants must be in attendance in order to be considered for this vacancy.

An Ad Hoc Committee of two members each from the City Council and Library Board is in the process of examining the public process and criteria for Board selection and appointment. The completion of recommendations and approval of the new process is not expected to be finalized prior to the April Board meeting.

Following discussion the Board will make a recommendation for appointment to the City Council.

FUTURE ACTION

There is no action required.



BERKELEY PUBLIC LIBRARY

DISCUSSION CALENDAR

April 18, 2007

TO: Board of Library Trustees

FROM: Donna Corbeil, Director of Library Services

SUBJECT: Preliminary budget presentation and follow-up on the budget workshop in preparation for approval of the FY2008/09 Library budget

FISCAL IMPACT

There is no fiscal impact from this report; however, the actions taken as part of the budget process will have an impact on the Library's finances.

BACKGROUND

PLANNING PROCESS

In February and March the Board held budget workshops as part of the regular Board meetings. As part of this process the Board accomplished the following:

- Established a budget timeline and review process
- Reviewed detailed expenditure categories of both personnel costs and non-personnel costs
- Adopted budget priorities for FY2008
- Reviewed proposed budget modifications, including baseline reconciliation and preliminary budget recommendations.

The FY2008 budget timeline has been modified to include details from the February and March meetings to indicate the supplemental March 14, 2007 meeting was canceled and to add the May 9, 2007 public hearing on the budget. In order to meet the timeline for approval of the final Library budget prior to the end of the fiscal year and to ensure the recommended Library Tax vote is approved by the City Council, a final FY2008 budget will be brought for adoption on May 16, 2007.

PRIORITIES

The adopted budget priorities for FY2008 (R07-27) will serve as a guide to match resources with Board priorities. These are:

- Continue to pursue restoring hours of service at the branches.
- Continue to pursue the potential of moving South Branch to the Ed Roberts Campus.



- Continue to pursue the implementation of WiFi at all branches, including Central.
- Continue to identify and meet the needs of Southwest Berkeley with a bookmobile or other collaborative action.
- Undertake two planning studies for services and facilities, including community engagement.

CURRENT SITUATION AND ITS EFFECTS

FY2008 PROPOSED SUMMARY

Proposed budget modifications in the area of both personnel and non-personnel were presented at the March meeting in chart form and discussed in the budget memo narrative. Following that discussion and clarification with staff, further recommendations are recommended: in the area of personnel, the elimination of the 1.0 FTE Librarian position in Reference is withdrawn until the new Deputy Director has an opportunity to familiarize himself with Adult Services operations at Central. One position will be eliminated, the Librarian I or Supervising Librarian in FY2008; until this is determined the exact savings cannot be determined. In the area of non-personnel, the budget of \$25,000 for wireless equipment, a one-time expense, is no longer needed. Staff is confident that this project can be completed with funds in the FY2007 budget. An update on this project will be given in May 2007.

EXPENDITURES

The year-to-date expenditure for all funds as of March 30, 2007 indicates spending for FY2007 is on track (Attachment B). In summary:

- In the area of salaries and benefits the percent expended is lower than the third quarter projections. While the Library is actively filling vacancies, it is expected that a fund balance in this area will occur.
- While staff is negotiating with Checkpoint Systems, a proposed maintenance contract will not be initiated in the current fiscal year, thereby resulting in the savings of the \$35,000 placeholder in the adjusted 2007 budget.
- Expenditures in the area of capital projects are expected to be fully encumbered, though they are currently at 29%.
- The same will be true of computers, printers and software, which are expended at 19.6% at the end of the third quarter.

The City's Finance office has set the year-end ordering deadline for requisitions for services and supplies as May 17, 2007. In the Library we have set an internal date of May 10, 2007 to ensure the City deadline will be met. In effect, all normal purchasing done by purchase order and new transactions will end May 31st with all FY2007 invoices due to accounts payable by July 16, 2007. Not meeting the later deadline results in expenditures encumbered against FY2008 funds.

REVENUE

Updated revenue projections will be available for the May 18th Board meeting. The Library receives Library Tax payments in December and April. The April 30th Library Tax Fund 5-Year Fund Analysis Report will reflect the revised FY2007 actuals, the projected surplus and revised gross fund balances. The projected Library Tax revenues for FY2008 proposed will reflect the proposed tax rate increase, based on the greater of the two indexes. Under the category of



Grants, the annual gifts from the Friends of the Library and the Library Foundation will be included. While no official notice has been received, the Library Foundation Board has indicated a desire to fund the capital projects included in the FY2008 budget proposal totaling \$50,000.

As presented in the February and March budget reports, five-year forecast future uncertainties are the assumption of no COLA increases in FY2009 and the continuation of an adequate tax rate increase to meet increased costs. In order to adequately prepare for unanticipated expenses, maintaining an adequate reserve and fund balance is highly recommended.

FUTURE ACTION

At the May 18, 2007 meeting, the Board should make final revisions to the FY2008/2009 Library budget. At that time the Board can consider public comments heard at the May 9, 2007 special meeting that will be devoted to gathering input from the community on Library budget-related issues.

Information regarding the two indexes (the cost of living in the immediate San Francisco Bay Area (CPI) and per capita personal income growth (PIG) in California should be available in early May. The Board will then be in a position to recommend a percentage adjustment of the Library Tax (Library Relief Act of 1980) to the City Council.

Staff will include a Year-To-Date (Y-T-D) expenditure detail for all funds as of April 30, 2007 at that time. An estimate of unexpended funds (i.e. those unencumbered, unallocated, and the anticipated fund balance) will be detailed. In addition, any final budget adjustments or expenditures for FY2007 will be recommended at that time.

This cumulative information, the projected tax rate increase, fund balance carry-forward, and FY2007 unexpended funds will allow staff to propose a spending plan based on projected revenues and Board priorities for the coming fiscal year.

DOCUMENTS ATTACHED

- Attachment A - FY08 Budget Timeline
- Attachment B - Y-T-D Expenditure Details for All Funds: FY07
- Attachment C - FY2008 City Council Budget Calendar

**BERKELEY PUBLIC LIBRARY
FY08 Budget Timeline**

Date	Item	Documents
January 17, 2007	FY07 Annual Budget Update - 2nd Quarter	<ol style="list-style-type: none"> 1. Y-T-D Expenditure Details: FY07 as of 12/29/06 2. Library Tax Fund: 5-Year Fund Analysis (1/10/07) 3. Gift Fund: 5-Year Fund Analysis (12/29/06) 4. All Other Funds: 5-Year Fund Analysis (12/29/06)
February 21, 2007	Budget Workshop in Preparation for Development and Approval of the FY08 Library Budget	<p><u>FY2008 Budget Binder</u></p> <ol style="list-style-type: none"> 1. Y-T-D Exenditure Details: FY07 as of 2/9/07 2. Expenditure Category Descriptions 3. Pie Chart: FY07 Adjusted Budget 4. Pie Chart: FY07 Materials Allocation 5. Pie Chart: FY07 Revenue 6. Pie Chart: FY08 Revenue 7. Library Tax Fund: 5-Year Fund Analysis (2/13/07) 8. Gift Fund: 5-Year Fund Analysis (2/12/07) 9. All Other Funds: 5-Year Fund Analysis (2/12/07) 10. FY08 Position Summary by Classification (2/12/07) 11. FY08 Position Summary (12/29/06) 12. FY08 Baseline Organizational Charts
March 14, 2007	Supplemental Budget Meeting, if necessary	Canceled
March 21, 2007	FY08 Baseline Budget and preliminary proposed changes; personnel expenditures; adopt priorities	<ol style="list-style-type: none"> 1. Y-T-D Expenditure Details: FY07 as of 3/9/07 2. Organizational Chart Narrative 3. Capital Improvements 4. Library Tax Fund: 5-Year Fund Analysis (3/12/07) 5. Personnel Budget Modifications (3/15/07) 6. Non-Personnel Budget Modifications (3/15/07) 7. Friends of BPL: FY08 Grant Request Summary
April 18, 2007	FY07 Annual Budget Update - 3rd Quarter FY08 Proposed Budget submission and discussion	<ol style="list-style-type: none"> 1. Y-T-D Expenditure Details: FY07 as of 3/30/07
May 9, 2007	Public Hearing on the budget	TBD

**BERKELEY PUBLIC LIBRARY
FY08 Budget Timeline**

Date	Item	Documents
May 16, 2007	Adoption of FY08 Budget and recommended Library Tax rate increase	TBD
May 16, 2007	City Council to adopt Library Tax rate for FY08	TBD
June 20, 2007	No budget discussion scheduled	TBD
July 18, 2007	FY07 Annual Budget Update - 4th Quarter	TBD

BERKELEY PUBLIC LIBRARY
Y-T-D Expenditure Details for All Funds: FY07
as of 3/30/07

	Adopted Budget	Adjusted Budget	Y-T-D Actuals	Balance	% Expended	Target
<u>Salaries & Benefits</u>						
Salaried Employees	6,849,347	6,849,347	4,105,782	2,743,565	59.9%	
Hourly Employees	544,886	544,886	490,914	53,972	90.1%	
OT and Additional Hours	4,366	4,366	117,710	(113,344)	2696.1%	
Misc. Wage Payments	-	-	14,873	(14,873)		
Benefits	3,891,623	3,891,623	2,333,739	1,557,884	60.0%	
Target Salary Savings	(195,542)	(195,542)	-	(195,542)		
	<u>11,094,680</u>	<u>11,094,680</u>	<u>7,063,018</u>	<u>4,031,662</u>	<u>63.7%</u>	<u>77.2%</u>
<u>Prof./Tech. Services</u>						
Temporary Agency Services	5,000	12,500	9,154	3,346	73.2%	
AMS Net, Inc.	-	10,794	10,794	-	100.0%	
Critical Solutions	5,688	5,688	-	5,688	0.0%	
Dubberly Garcia	-	22,000	21,103	897	95.9%	
Elisa Klevin (tapestry)	6,500	6,500	6,500	-	100.0%	
E.S.B. Management	-	2,840	2,840	-	100.0%	
Hatchuel Tabernik & Assoc.	-	24,952	24,952	-	100.0%	
Innovative Interfaces Inc	86,100	86,100	81,894	4,206	95.1%	
OCLC	25,000	30,000	23,040	6,960	76.8%	
Peninsula Library Systems	-	6,520	6,445	75	98.8%	
Securitas Security Services	70,000	85,000	62,687	22,313	73.7%	
Unique Management	25,000	8,000	5,612	2,388	70.2%	
Misc. Prof/Tech Services	97,112	138,529	(13,710)	152,239	-9.9%	
	<u>320,400</u>	<u>439,423</u>	<u>241,311</u>	<u>198,112</u>	<u>54.9%</u>	<u>75.0%</u>
<u>Bldg/Maint. Services</u>						
Advanced Tile Restoration	25,000	28,000	27,975	25	99.9%	
Agnitsch Electric Co.	8,000	8,000	7,593	407	94.9%	
Bay Alarm	5,000	6,727	6,727	-	100.0%	
Marina Mechanical	20,114	21,000	20,924	76	99.6%	
Orkin Exterminators	15,000	20,000	1,640	18,360	8.2%	
Simplex Grinnel Fire Systems	5,000	5,000	3,725	1,275	74.5%	
Thyssen Krupp Elevators	14,000	14,000	13,469	531	96.2%	
Total DVR	-	14,000	13,359	641	95.4%	
US Alarm System	12,268	12,268	17,430	(5,162)	142.1%	
Misc. Bldg/Maint. Services	89,222	60,893	(15,268)	76,161	-25.1%	
	<u>193,604</u>	<u>189,888</u>	<u>97,574</u>	<u>92,314</u>	<u>51.4%</u>	<u>75.0%</u>
<u>Equipment Maintenance</u>						
Checkpoint Maint. Contract	-	35,000	-	35,000	0.0%	
BMI Imaging Systems	-	11,004	11,004	-	100.0%	
Misc. Equip. Maint. Services	110,091	11,537	(2,429)	13,966	-21.1%	
	<u>110,091</u>	<u>57,541</u>	<u>8,575</u>	<u>48,966</u>	<u>14.9%</u>	<u>75.0%</u>
Grants/Gov. Payments	-	-	2,755	(2,755)		75.0%
<u>Utilities</u>						
Telephones	63,282	115,932	57,840	58,092	49.9%	
Water	18,812	18,812	10,184	8,628	54.1%	
Gas/Electricity	249,000	257,141	173,704	83,437	67.6%	
Refuse	34,251	24,251	12,475	11,776	51.4%	
Sewer	-	-	5,544	(5,544)	-	
	<u>365,345</u>	<u>416,136</u>	<u>259,747</u>	<u>156,389</u>	<u>62.4%</u>	<u>75.0%</u>

BERKELEY PUBLIC LIBRARY
Y-T-D Expenditure Details for All Funds: FY07
as of 3/30/07

	Adopted Budget	Adjusted Budget	Y-T-D Actuals	Balance	% Expended	Target
<u>Purchased Services</u>						
Prof. Dues & Fees	17,970	690	990	(300)	143.5%	
American Libraries Assoc.	2,000	2,000	1,910	90	95.5%	
Bay Area Library Info System	18,000	18,000	17,793	207	98.9%	
California Library Assoc.	1,200	1,200	1,200	-	100.0%	
Urban Libraries Council	-	7,500	7,500	-	100.0%	
Printing & Binding	25,850	22,323	16,675	5,648	74.7%	
Training	41,684	57,582	31,509	26,073	54.7%	
Local Transportation	6,460	6,460	2,627	3,833	40.7%	
Advertising	6,544	10,498	5,386	5,112	51.3%	
Misc. Purchased Services	37,000	2,015	235	1,780	11.7%	
	156,708	128,268	85,825	42,443	66.9%	75.0%
<u>Rentals</u>						
Rental of Land/Buildings	7,090	6,585	3,612	2,973	54.9%	
Rental of Equip/Vehicles	2,200	4,700	1,779	2,921	37.9%	
Rental of Office Equip/Furnitu	11,000	18,219	9,037	9,182	49.6%	
Lease of Software License	-	-	100	(100)		
	20,290	29,504	14,528	14,976	49.2%	75.0%
Mail/Delivery Services	8,175	28,775	22,376	6,399	77.8%	75.0%
<u>Materials & Supplies</u>						
Misc. Office Supplies	53,900	12,972	(4,266)	17,238	-32.9%	
Coast to Coast Computer	8,000	8,000	5,090	2,910	63.6%	
Office Depot	25,000	30,000	23,022	6,978	76.7%	
Brodart	8,000	8,000	4,630	3,370	57.9%	
CDW Government	6,000	6,000	4,594	1,406	76.6%	
Checkpoint Systems Inc.	45,000	60,000	39,193	20,807	65.3%	
DEMCO	8,000	8,000	7,655	345	95.7%	
Gaylord Brothers	5,000	7,000	6,802	198	97.2%	
Universal Bldg. Supplies	10,000	15,000	11,301	3,699	75.3%	
Misc. Field Supplies	169,313	207,358	53,128	154,230	25.6%	
Food	14,000	15,800	4,447	11,353	28.1%	
Library Materials	1,318,121	1,231,022	647,129	583,893	52.6%	
Misc. Supplies	45,400	120,058	19,917	100,141	16.6%	
	1,715,734	1,729,210	822,642	906,568	47.6%	75.0%
Janitorial Services	130,000	155,525	103,353	52,172	66.5%	75.0%
Capital Projects	140,000	140,000	40,788	99,212	29.1%	75.0%
<u>Property</u>						
Machinery & Equipment	-	48,714	45,132	3,582	92.6%	
Furniture & Fixtures	15,021	42,044	13,365	28,679	31.8%	
Computers/Printers/Software	100,000	222,791	204,863	17,928	92.0%	
	115,021	313,549	263,360	50,189	84.0%	75.0%
<u>Non-Capitalized Property</u>						
Small Equipment	5,000	27,221	4,667	22,554	17.1%	
Furniture & Fixtures	-	11,121	6,168	4,953	55.5%	
Computers/Printers/Software	-	40,000	7,848	32,152	19.6%	
	5,000	78,342	18,683	59,659	23.8%	75.0%

BERKELEY PUBLIC LIBRARY
Y-T-D Expenditure Details for All Funds: FY07
as of 3/30/07

	Adopted Budget	Adjusted Budget	Y-T-D Actuals	Balance	% Expended	Target
Internal Services	4,012	4,012	4,251	(239)	106.0%	75.0%
Interfund Transfers	50,822	50,822	33,888	16,934	66.7%	75.0%
RFID Loan Repayment	119,337	127,280	83,544	43,736	65.6%	
	<u>3,454,539</u>	<u>3,888,275</u>	<u>2,103,200</u>	<u>1,785,075</u>	<u>54.1%</u>	75.0%
Total Expenditures	14,549,219	14,982,955	9,166,218	5,816,737	61.2%	75.0%

Note: Year-to-Date does not include encumbrances.

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CITY MANAGER

Budget Division, 2180 Milvia St., Berkeley, CA 94704

TEL: (510) 981-7000, Fax: (510) 981-7099,

Office Hours: Mon-Fri 8a.m. - 5p.m., Email: manager@ci.berkeley.ca.us

ANIMAL CARE SERVICES

BUDGET INFORMATION

NEIGHBORHOOD SERVICES

Budget Calendar

› Elected Officials

› City Services

All meetings will be held in Council Chambers, 2136 Martin Luther King Jr. Way.

› Budget Info

› Transportation

› Newsletter

› Legislative Updates

› UC Development

› LBNL

All meetings are public, but only those designated as public hearings will have an opportunity for public comment. The public is also invited to write, call, email and visit their representatives on the City Council before and during the budget process. In addition to the public hearing dates listed above, there may be more public meetings scheduled through May and June. Information about those and other events will be posted as those events are finalized.

April 24

Public Hearing

CDBG/Community Agencies Public Hearing and Council Priorities

7:00 p.m.

May 8

Workshop

FY 2008 & FY 2009 Proposed Biennial Budget

5:00 p.m.

May 22

Public Hearing #1

Budget and Fees

7:00 p.m.

June 12

Workshop

Council budget recommendations due to City Manager; Citywide capital plan

5:00 p.m.

June 19

Public Hearing #2

Budget and Fees

7:00 p.m.

June 26

Adopt Budget Regular 7:00 p.m.

Adopt Tax Rates Regular 7:00 p.m.

If you are unable to access this information online, please participate by contacting us via email webmanager@ci.berkeley.ca.us, telephone (510) 981-7003, or TDD (510) 981-6903.

Comment On The Budget

The City Manager wants to hear from the public regarding the budget process, cost saving ideas, and budget priorities. Please contact the City Manager, Phil Kamlarz, at Manager@ci.berkeley.ca.us.

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BERKELEY PUBLIC LIBRARY

CONSENT CALENDAR

April 18, 2007

To: Board of Library Trustees

From: Darryl Moore, Board of Library Trustee

Subject: Adopt a resolution to approve conducting a public hearing to discuss the FY2008 & 2009 Library budget on May 9, 2007

RECOMMENDATION

Adopt a resolution instructing the Library Director to organize a public hearing to be conducted by the Board of Library Trustees at which the FY2008 & 2009 biennial budget for the Berkeley Public Library will be discussed.

BACKGROUND

At the March 21, 2007 Board meeting Trustee Moore recommended the Board hold a public hearing in order to take public comments regarding the proposed FY2008 & 2009 Library Budget prior to the approval of the budget by the Board. The Library staff has reserved the West Berkeley Senior Center, located at 1900 Sixth Street in Berkeley for May 9, 2007 from 7:00 PM to 9:00 PM.

In preparation for the public meeting the Library will:

- Prepare documents for public distribution prior to the meeting
- Advertise the meeting in the local newspaper, at branch libraries, and on the Library's web site.

FISCAL IMPACT

There is no fiscal impact. The Board may consider the comments heard at the public hearing prior to approving the Library budget at the May meeting.

FUTURE ACTION

No future action is needed at this time.

ATTACHMENTS

Resolution

RESOLUTION NO.: R07-_____

INSTRUCTING THE DIRECTOR OF LIBRARY SERVICES TO ORGANIZE A PUBLIC HEARING TO BE CONDUCTED BY THE BOARD OF LIBRARY TRUSTEES AT WHICH THE FY2008 & 2009 BIENNIAL BUDGET FOR THE BERKELEY PUBLIC LIBRARY WILL BE DISCUSSED

WHEREAS, on February 21, 2007 at the regular meeting of the Board of Library Trustees, a Budget Workshop was held for the FY2008 Library budget and the Board requested revisions and additional information; and

WHEREAS, on March 21, 2007 at the regular meeting of the Board of Library Trustees, the Director of Library Services organized the second Budget Workshop, this time including FY2009 in the discussion; and

WHEREAS, at the March regular meeting it was recommended that the Board hold a public hearing to take public comments regarding the FY2008 and 2009 biennial budget for the Berkeley Public Library; and

WHEREAS, the Board anticipates approving the final FY2008 Library budget during their regular June 2007 Board meeting.

NOW, THEREFORE, BE IT RESOLVED by the Board of Library Trustees of the City of Berkeley that they hereby instruct the Director of Library Services to organize a Public Hearing to be conducted by the Board of Library Trustees at which the FY2008 and 2009 biennial Berkeley Public Library budget will be discussed during a special meeting to be held on May 9, 2007.



BERKELEY PUBLIC LIBRARY

INFORMATION CALENDAR

Date: April 18, 2007

TO: Board of Library Trustees

FROM: Trustee Ying Lee
Trustee Terry Powell

SUBJECT: Berkeley Public Library's South Berkeley Community's Library Needs and Ed Roberts Campus (ERC) Discussion Group Report

BACKGROUND

At their October 18, 2006, meeting the Board of Library Trustees appointed members Ying Lee and Terry Powell to continue to study the library needs of South Berkeley and the issues of the possibility of Berkeley Public Library's participation in the Ed Roberts Campus. Alan Bern, Berkeley Public Library's Community Relations Librarian, and Christopher Adams, Vice President of the Board of Directors of the Berkeley Public Library Foundation, are also in this discussion group. Director of Library Services Donna Corbeil has joined the group as well.

Although no decision has been made regarding actions to meet the library needs of the South Berkeley Community, we are continuing in the information-gathering stage in order to narrow our foci.

SOUTH BERKELEY COMMUNITY'S LIBRARY NEEDS AND ERC DISCUSSION GROUP GOALS

- (1) Further investigate library needs of the South and Southwest Berkeley communities, with specific outreach to leaders and active members.
- (2) Continue to investigate the Ed Roberts Campus possibility for South Branch.
- (3) Develop additional information on a bookmobile, primarily for Southwest Berkeley, given the interest of the Berkeley Public Library Foundation and the possibility of a collaboration with the City of Emeryville and its School District and, perhaps, others.
- (4) Give the Berkeley Public Library Foundation a focused, near-term fund-raising project. Further investigate library needs of the South and Southwest Berkeley communities, with specific outreach to leaders and active members.
- (5) Continue to investigate the Ed Roberts Campus possibility for South Branch.
- (6) Develop additional information on a bookmobile, primarily for Southwest Berkeley, given the interest of the Berkeley Public Library Foundation and the possibility of a collaboration with the City of Emeryville and its School District and, perhaps, others.
- (7) Give the Berkeley Public Library Foundation a focused, near-term fund-raising project.



UPDATE OF MEETINGS OF ED ROBERTS CAMPUS DISCUSSION GROUP AND IDEAS THAT SURFACED

- The Discussion Group has been informed by ERC partners that at 50% completion of construction documents, there appears to be a larger deficit in budget than previously though, which may set back ground-breaking. The City of Berkeley has, so far, not offered a loan, but talks are still going on with congressional representatives about more help. The ERC has between 16-18 thousand square feet space to lease or sell in its building, and from the City of Berkeley they are most positive about the Berkeley Public Library being a partner or tenant. Donna pointed out that general study of needs for all branches becomes even more important if ERC and possible move of South Branch are postponed.
- Ying Lee has reserved the St. Paul African Methodist Episcopal Church (A.M.E.) at 2024 Ashby Avenue in Berkeley for a *Community Forum on Improving Library Services in South Berkeley* on Saturday, June 9, 2007, 10:30 am to noon. The Community is invited to a public-input discussion of possible future directions for library services in South Berkeley, hosted by the Berkeley Public Library.
- The Discussion Group will create a poster for the Community Forum. The summarized content: a) history of former facilities (which include at least one site very close to proposed ERC); b) condition of present facility ; and c) the ERC proposal (which will be prepared by the ERC partners). Photos will be taken of the South Branch.
- Donna reported on the status of the two RFPs: the RFP for study of Southwest Berkeley will go out the week of April 9. There is a timeline set for the space RFP and selection and interview panels have been firmed up.

NEXT STEPS

- Discuss with Michael Caplan the South Berkeley funds that may (or may not) be available to the library.
- Continue to explore possibility of borrowing funds for ERC.
- Follow up with Foundation when appropriate: it was a vote of support, but not a pledge until BOLT decides next moves.
- Roxanne Figueroa, Executive Director of the Foundation, has volunteered to set up tours of other similar facilities in the Bay Area for the Discussion Group and BPL staff to attend.
- Emeryville Exploration Group (Susan Kupfer, Laura Anderson, Donna Corbeil, and Alan Bern) will meet with Karen Hemphill, City Clerk of Emeryville, and School Director of the Berkeley Unified School District to discuss the possibilities of future collaborations, in terms of library services, between the two cities.

BERKELEY PUBLIC LIBRARY'S STAFF COMMITTEE

- Following the South Berkeley Community's Library Needs and ERC Discussion Group recognition of the benefits of having a Staff Committee to carry forward the investigation of possibilities for fulfilling the library needs of the south and southwest Berkeley communities, a Berkeley Public Library Staff Committee has been formed and has continued to meet regularly.



- Members are:
 - Jeri Ewart, South Branch, Co-Chair
 - Marge Sussman, West Branch, Co-Chair
 - Alicia Abramson, IT
 - Bob Baty, Maintenance
 - Alan Bern, Community Relations
 - Hilda Chavez, North Branch
 - Donna Corbeil, Director of Library Services
 - Vi Dyas, Teen Services, Central and South Branch
 - Erica Glenn, Central Children's Library
 - Linda Sakamoto-Jahnke, Literacy, West Branch
 - Jane Scantlebury, Acting Supervising Librarian, Art & Music
 - Alisa Somera, Administration
 - Vivian Vigil, North Branch

- The Staff Committee will work with the South Berkeley Community's Library Needs and ERC Discussion Group and Emeryville Exploration Group.

- The Staff Committee continued to:
 1. Determine the borders of Southwest Berkeley; edit and distribute the RFP for the four possible building scenarios at the ERC; write and edit the RFP for the Southwest Berkeley Library needs assessment.
 2. The entire group sent in possible candidates for the RFPs; review the RFP for the building scenarios at ERC and the RFP for the Southwest Berkeley Library needs assessment. The building scenarios are RFP will move on a faster timeline, but both RFPs will be expedited quickly.



BERKELEY PUBLIC LIBRARY

INFORMATION CALENDAR

April 18, 2007

TO: Board of Library Trustees
FROM: Donna Corbeil, Director of Library Services
SUBJECT: April 2007 Monthly Report from Library Director Donna Corbeil

INTRODUCTION

Every month the Library Director gives the Board a report on Library activities and updates from the preceding month.

FISCAL IMPACT

This report will have no fiscal impacts.

PERSONNEL

A summary of the positions filled and lists developed in the last month is attached, Berkeley Public Library's Recruitment Timeline.

I am pleased to announce the hiring of a new Deputy Director, Douglas Smith. Mr. Smith, currently Supervising Librarian of the Main Library, Oakland Public Library, will begin his new position on May 14, 2007. Doug has worked in many library settings since 1988. He is a Berkeley resident and completed his Library degree at U.C. Berkeley. He brings a familiarity with the community and knowledge of the issues and services challenging urban libraries. His hiring will greatly support the management and administrative teams at Berkeley Public Library. A total of four candidates were interviewed on Thursday, March 29, 2007, from a pool of seven applicants. The process included: a meet & greet with staff, a library tour, a staff panel, a management panel, and an executive panel. The latter panel included Library Director Corbeil, Trustee Lee, Trustee Kupfer and Jill Bourne, Deputy Director of the San Francisco Public Library.

On Monday, March 26, 2007 interviews were held for the position of General Services Manager. A total of six candidates were interviewed by three panels: a staff panel, manager panel, and executive panel. The three finalists were invited back to a second interview held on April 12, 2007 with Director Corbeil and new Deputy Director Smith.

At the Central library Lynn Murdock has been appointed not-to-exceed six months Supervising Librarian of the Art & Music section and Jane Scantlebury has been appointed not-to-exceed six months Supervising Librarian of the Reference section. Thank you to Bob Saunderson for serving as not-to-exceed six months as Supervising Librarian of the Reference section, he provided leadership with professionalism and dedication.



LIBRARY DEVELOPMENT

ERC/SOUTHWEST BERKELEY

In April, the City Finance Office released two Requests for Proposals (RFPs) on behalf of the Library. Both of these contracts will be funded by Workforce Housing Reward program (WFH) grant funds in the amount of \$50,000. As I previously reported, City staff included a proposal to fund a project that "would provide planning documents, a needs assessment and building program, prior to beginning design work on a new South Branch Library". The issuance of these two RFPs meets the stipulation that funds are to be encumbered by June 30, 2007.

Berkeley Public Library Branch at Ed Roberts Campus Space Planning and Cost Analysis Schedule

- Issue RFP to potential bidders – March 22, 2007
- Proposals due from potential bidders – April 12, 2007
- Interviews of candidates – Week of April 23, 2007
- Complete Selection Process – April 27, 2007
- Award of Contract – April 30, 2007
- Notice to proceed – May 1, 2007
- Completion of Work – May 31, 2007
- Presentation to Board of Library Trustees – June 20, 2007

Berkeley Public Library Southwest Berkeley Library Service Needs Schedule

- Issue RFP to potential bidders – April 10, 2007
- Proposals due from potential bidders – May 1, 2007
- Interviews of candidates – Week of May 14, 2007
- Complete Selection Process – May 18, 2007
- Award of Contract – May 21, 2007
- Notice to proceed – May 22, 2007
- Completion of Work – July 22, 2007
- Presentation to Board of Library Trustees – August 15, 2007

The staff task force will continue to meet to discuss the execution of these contracts, gathering public comment, and discussion of related operational and service topics.

SELF-CHECK/ RFID/CHECKPOINT UPDATE

A call for staff interested in participating on a task force that will examine self-checkout and RFID issues has resulted in a 15 member group to be lead initially by the Director and eventually by the Deputy Director. A final charge for the staff task force will be determined following the first meeting of the group, which is tentatively scheduled for the week of April 16th. Following a general "brainstorming" at the first meeting, a work plan of the issues to be examined will be developed.

The draft charge for this task force is:

- 1) To assess what's working well and what is not.
- 2) To determine what barriers prevent self-checkout.
- 3) To recommend changes to address these issues (problems?).



- 4) To evaluate the effectiveness of the changes.

On March 23rd Library staff and Trustee Kupfer met with Al Skinner, Library Account Manager at Checkpoint System, to discuss service issues and to begin preliminary negotiations for an annual maintenance contract beginning in FY2008. Among the issues discussed were improved communication regarding service response, disc mate technology, scheduling staff training on use of the wands, and software upgrades to allow tracking of checkout numbers by station, among other topics. Library staff will complete an inventory of equipment in anticipation of a detailed quote for the maintenance of each piece of equipment.

Mr. Skinner was asked to address concerns regarding Checkpoint's business commitment to libraries. He reported that Checkpoint Systems is expanding its North American patron services division to better serve evolving needs of libraries in the 21st century. This new group is charged with the development of patron-focused products and services for libraries, complementing Checkpoint's traditional security business, as libraries evolve to meet the increasingly diverse needs of their patrons in the 21st century. A press release on the company's webpage gives additional information: "The Checkpoint Patron Services Division expanded the scope of what was formerly the Library Division at Checkpoint. In addition to several new product development initiatives it will carry out, Patron Services will continue to market, implement and support all of the traditional security based products sold by Checkpoint to libraries, with a special focus on how those products can improve the patron experience. These include Checkpoint's RFID based security products, its new Universal Self-Service platform, the DiscMate digital media security system, and the CheckPASS on-site system that automates the process of how patrons schedule time for computers and use printers." The full text is available at: <http://www.checkpointsystems.com/> for official press releases.

PROFESSIONAL ACTIVITIES

The Library held the fourth session of the staff training class sponsored by Infopeople, "Oil on the Waters: Practical Techniques for Calming Difficult Library Users." The class was held from 9:00 a.m. to 4:00 p.m. on Friday, March 30, 2007 and will be offered to staff again on Friday, September 7, 2007. At the March workshop 19 staff from all classifications and branches attended.

The Innovative Users Group Conference will be held in San Jose on May 15th thru 17th. Eleven staff members will be attending.

Library staff was made aware of the annual opportunity to apply for Library Staff Scholarships from the Friends of the Berkeley Public Library – Lyle Collins Memorial. A flyer with the details is attached.

The Library Director attended the annual Link+ Directors meeting on April 11, 2007 held at Innovative Interfaces' headquarters in Emeryville.

PROGRAMS, SERVICES AND COLLECTIONS

On April 6, 2007 the Library celebrated the 5th birthday party for the Renovated Central Library. Among the more than 50 people in attendance were former Library Director Gina Minudri and former president of the Friends of the Library, Anne Carroll.

BPL and Berkeley City College professor Chuck Wollenberg continue their collaboration presenting a lecture series entitled, Strange Bedfellows: Art and Public Policy in Berkeley—



Past, Present, and...Is There a Future? The class began April 9th and continues on Mondays at 7:00 p.m. through May 21st. There are many notable guest speakers including authors Gray Brechin, Kimi Kodani Hill; artists David Goines, Eduardo Pineda; publisher Malcolm Margolin, and UC Berkeley Art Museum's Peter Selz and Kevin Consey. The first night attendance was over 85 who participated in a lively discussion following the presentation.

The Berkeley Public Library will sponsor the third annual "National Library Workers Day" on Tuesday, April 17th, during National Library Week. National Library Workers Day is a time to honor the contributions of all library workers, including librarians, support staff, and others who make your Berkeley Public Library services possible.

Berkeley Public Library will celebrate its second annual Children's Day/Book Day on Sunday, April 29th, from 2:00-4:00 p.m. in the Central Library. Attendees will enjoy the music of Los Mapaches and the magic of Norman Ng, with Nga Trinh's origami instruction. All children will receive a free book.

The Library will participate in the Berkeley Chamber of Commerce Showcase 2007 to be held May 17, 2007 from 5:00 p.m. to 7:30 p.m. at the Double tree Hotel located at 200 Marina Boulevard.

DOCUMENTS ATTACHED

- Attachment A - Personnel Summary
- Attachment B - Friends of the Berkeley Public Library Lyle Collins Memorial Library staff Scholarship

BPL's Recruitment Timeline

<i>Classification</i>	<i>Posting Date</i>	<i>Closing Date</i>	<i>EXAM Date Tentative</i>	<i>Comments</i>
Library Aide	1/2/2007	2/5/2007	2/15/2007	New List Valid 2/6/07-2/6/08
Administrative Secretary	Berkeley Matters 2/2/07	Closed	Interviews & Testing held wk of 2/5/07.	Alisa Somera selected. Hire Date : 2/27/07
*Circulation Services Manager	1/29/2007	2/26/2007 Closed	2 nd Round of Interviews to be held 4/12/07.	Down to 3 Finalists.
*Deputy Director	2/5/2007	3/5/2007	Interviews held 3/29. [3 Panels, 30 min Reception, Tour of Central & 2 Branches]	Douglas Smith selected. Start Date: 05/14/07
Library Assistant	2/26/2007	04/02/2007 Closed	Exam to be held 4/18/2007.	New list to be established by wk ending 4/28/07.
Supervising Librarian	3/19/2007	4/16/2007 Open	Interviews TBA	
*Library Services Manager	4/23/2007	5/21/2007		Finalization of Brochure in progress.
Library Specialist I & II	5/14/2007	6/11/2007	Competitive	List extended through 9/29/07
Librarian I/II	8/20/2007	9/21/2007	10/4/2007	Lists good through 10/16/07.

*To be posted @ (WEB pages) ALA, CLA(Job Mart), libraryjobpostings.com
(emailing lists) Innovative Users group, BALIS, CALA, REFORMA, BCALA, AILA, APALA
**To be posted @CLA, BALIS, IUG

Friends of the Berkeley Public Library
Lyle Collins Memorial

LIBRARY STAFF SCHOLARSHIPS

These scholarships provide an opportunity for library staff to apply for financial aid so that they may pursue a degree or certificate that will further their careers in public library work in Berkeley.

Application Criteria

1. Applicants will have worked for the Berkeley Public Library in either a full time or part-time capacity for a minimum of two years.
2. Before funds are disbursed, applicants must have been active in a public library degree or certificate program.

Application Process

To apply for a scholarship, send a email announcing your intention to the Friends' Scholarship Chairman Jim Carroll (JBCAR_99@yahoo.com). Include your address (email or PO) and phone number. You will then receive a request for information that will be used to evaluate your application. In the past such information has included...

1. How long and in what position(s) have you worked at Berkeley Public Library? What other work experience have you had?
2. What are your career plans and objectives?
3. To what institution and to what degree or certificate program have you applied, or been accepted? How will this program help you in your current position and in your future career in public library work
4. Include a budget of your estimated expenses, and the times at which they must be paid for the year 2005-2006 (i.e. tuition, books, and other costs associated with you course work).
5. What application deadines, if any, will you need to meet?

Your application must be received by **April 30, 2007**. You will receive a response by May 30, 2007. For further information (or to offer suggestions as to how to improve this process) please call or email Jim Carroll at 510 658-2683. (Please indicate how to contact you.)



BERKELEY PUBLIC LIBRARY

INFORMATION CALENDAR

April 18, 2007

TO: Board of Library Trustees
FROM: Beverli Marshall, Finance Manager
SUBJECT: Update on the Proposed Stucco Repairs at the Central Library

INTRODUCTION

Beginning on April 11, 2007, contractors will be on-site at the Bancroft building of the Central Library to conduct water intrusion testing and to then repair a sample section of the area identified as actively leaking.

FISCAL IMPACTS

There is no fiscal impact from this report.

CURRENT SITUATION AND ITS EFFECTS

Arntz Builders' insurance company has agreed to fund the cost of water testing and repairing a sample section of the stucco in the Bancroft building to evaluate both architectural compatibility and efficacy in stopping the existing leaks. The Library will permit access to Exterior Wall Systems, a separate contractor, to specific work areas on the 2nd and 3rd floors of the Bancroft (Administration) building to set up and conduct testing to begin identification of leaks in the south wall. Once they identify all the leaks in the specific area, Pacific sealants, the sub-contractor, will begin to fix the leaks in that section.

The City's project manager, John Rosenbrock, recommended that a standardized water intrusion testing procedure be performed both before and after the mockup is installed to demonstrate its ability to stop the water penetration. Arntz and the contractors agreed and suggested a chamber test (a negative pressure test) be used instead of a simple spray rack test. After the results of the test are available, it will be determined if further repair is needed, how to make the repairs and from what source the payment will be made.

The following timeline has been agreed to by all involved parties.

- Setup for the test will occur between April 11th and 13th between the hours of 8 a.m. to 5 p.m. The chamber test will be performed on April 14, 2007.
- The mockup repair will start the week of April 30, 2007 and will take approximately three weeks to perform. The repair work will take approximately 10 days to cure before post-repair testing can begin.
- The post-repair testing will occur some time during the following month. Setup for the testing will be similar to that of the initial testing setup. If the repairs are found to work then the process would be repeated all around the Bancroft building if the insurance agrees to fund the remaining work.



They estimate the work will take three months to complete. There may be updates to the work schedule as the process progresses. After the testing, Arntz, the sub-contractors, and the Library will meet to discuss the results and next steps.

BACKGROUND

Leaks in the stucco façade of the Central Library became evident shortly after occupation. The most egregious damage is on the 2nd floor in the Technical Services work area. The water damage necessitated the removal of sheet rock around the entire south and west walls from the floor to approximately three feet high. When a storm front causes wind and rain from the south and/or west to strike the building, water leaks occur. In addition, the lack of insulation and sheet rock causes heat loss in the affected areas.

FUTURE ACTION

After the results of the test are available, it will be determined what further repair is needed, how to make the repairs, and from what source the payment will be made. Repair work will begin only after these matters are settled. It will take approximately three to four months to complete all repairs. The sub-contractor will work with the Library to arrange the work so that it does not disrupt Library service delivery.

Since this matter is a subject of ongoing pending and threatened litigation, any matters relating to the City's remedies and the overall dispute regarding inadequate work should only be discussed in a future closed session with the City Council, City Attorney, and outside counsel. This closed session will be scheduled as the course of litigation dictates.

The logo for SirsiDynix OneSource. It features the SirsiDynix logo (a stylized 'S' inside a circle) followed by the text 'SirsiDynix' in a bold, sans-serif font. Below this, the word 'OneSource' is written in a much larger, bold, sans-serif font. The entire logo is set against a background of faint, overlapping circular patterns.

Monthly e-Newsletter
for the Worldwide
SirsiDynix Community

Monday, April 9, 2007

SirsiDynix OneSource January 2006

VOLUME 2 ISSUE 1

Web 2.0, Library 2.0, and Librarian 2.0: Preparing for the 2.0 World

by Stephen Abram, MLS, SirsiDynix vice president of Innovation

Recently I was asked if some software applications I was involved in were Web 2.0 compliant. This was amusing and distressing on so many levels. It's amusing because what is being called Web 2.0 isn't a "standard" in almost any sense of the word. It's distressing because it shows how quickly a conversation becomes an expectation in today's world. This is a perfect example of the power of the 95 Theses of the Cluetrain Manifesto. You can remind yourself about these at <http://www.cluetrain.com/>. The major thesis to me is number one – "Markets are conversations."

Anyway, I thought it might be useful to devote this month's column to a little information on Web 2.0 and its newborn babies, Library 2.0 and Librarian 2.0. And why should you read this column? You've heard it all before, but in a few years these Web. 2.0 conversations have the power to drive huge transformations in our media landscape and, therefore, our life, work, and play environments. Sigh. As I've noted on [my blog](#), we are entering a period of enormous change – far greater than what we've ever experienced in our lives to date. Both the Gartner Group and Morgan Stanley have noted that this will be transformational on a very global scale. It'll be exciting too, although those of us who care about communities, learning, and information will be tasked with some pretty heavy strategic planning goals.



Web 2.0

According to some sources, the term Web 2.0 has been around since about October 2004. From [Wikipedia](#), the free Web encyclopedia (gotta love the price), it is defined as:

Web 2.0 is a term often applied to a perceived ongoing transition of the World Wide Web from a collection of websites to a full-fledged computing platform serving web applications to end users. Ultimately Web 2.0 services are expected to replace desktop computing applications for many purposes.

I think Web 2.0 goes much further than this, actually beyond an application focus. It's really about the "hot" Web. I am talking here about "hot" in the McLuhanesque sense of the hot and cold or warm and cool aspects of technology. What makes the Web warmer or hotter? [Interactivity](#). Of course the Web is already interactive in a cooler sense. You can click and get results. You can send email and get responses. You can go to Web sites and surf. The old World Wide Web was based on the "Web 1.0" paradigm of Web sites, email, search engines, and surfing. Web 2.0 is about the more human aspects of interactivity. It's about

conversations, interpersonal networking, personalization, and individualism. In the library world this has relevance not just to our public Web portals but also to workplace intranets and the imperative for greater social cohesiveness in virtual teams and global content engagement. Plain intranets and plain Web sites are fast becoming old stuff – just so last century. The emerging modern user needs the experience of the Web, and not just content, to learn and succeed. We can see some of these modalities emerging in the gaming environment. Context is the word of the day here. Such technologies as are listed below serve as the emerging foundation for Web. 2.0:

- RSS (really simple syndication)
- Wikis
- New and revised programming methods like AJAX and APIs
- Blogs and blogging
- Commentary and comments functionality
- Personalization and "My Profile" features
- Personal media such as Podcasting and MP3 files
- Streaming media audio and video formats
- Reviews and user driven ratings
- Personalized Alerts
- Web Services
- Instant messaging and virtual reference including co-browsing
- Folksonomies, Tagging, and tag clouds
- Photos (e.g. Flickr, Picasa)
- Social networking software
- Open Access, Open Source, Open Content
- Socially driven content
- Social bookmarking (such as Delic.io.us)



The technology infrastructure of Web 2.0 is complex, constantly in flux, and really in a Renaissance mode. It includes server software, content syndication, messaging protocols, standards-based browsers, and various client applications.

This is fundamentally about a transition of the Web site and email-centric world from one that

is mostly about information (and largely textual information) to one where the content is combined with functionality and targeted applications. Web 2.0 could be seen as the Web becoming a computing platform for serving up Web applications to end users, but I believe that this is a too geek-centric point of view. It's primarily about a much higher level of interactivity and deeper user experiences, which are enabled by the recent advances in Web software combined with insights into the transformational aspects of the Internet. Web 2.0 is ultimately about a social phenomenon - not just about networked social experiences but about the distribution and creation of Web content itself, "characterized by open communication, decentralization of authority, freedom to share and reuse, and the market as a conversation." To enable this new world, we will see a more organized Web with a plethora of new modalities of categorized content, more developed deep-linking Web architecture, and a greater variety of Web display modes like visualization. Ultimately this will result in another shift in economic value of the Web, potentially equaling that of the dotcom boom, and probably driving an even higher level of social, political, institutional, and economic disruption.

What is truly exciting is that Web 2.0 is just the title of a conversation. There is no standard (at least not just a single one). We can all participate and influence the development of the next generation of the Web. To the detail oriented, this conversation may be too high in the stratosphere without enough concrete recommendations, and to the theoretically inclined, it may remain too visionary for real implementation. Among all of us, it is worth following. Web 2.0 is probably the series title of the most important conversation of our age - and one whose impacts can be truly transformational on a global scale.

Web 3.0

There is even discussion and dreaming about a "Web 3.0." One could speculate that the Google / Sun Microsystems alliance to create a Web-based operating system for applications like word processing and spreadsheets is an early indicator of this trend. Perhaps it will look something like the Croquet Project, which is very exciting and worth looking at reviewing as a potential scenario of what Web 3.0 might look like. Web 3.0 will probably be even more distributed in form than Web 2.0, and maybe some of the Web 2.0 applications will disappear or merge with a new integrated whole. Web Services or the emerging semantic Web may replace such things as social networking sites and repositories.

Library 2.0

In the library and information professional world, I believe that we generally deal with a savvier audience of users relative to the general consumer. We also tend to the digital divide issues of the more challenged user. This means that what our most critical users don't know about or use, we can often inform them about and train them in the newest technologies that can have an impact on their success. For those users that can quickly become comfortable using technologies such as Wikis, RSS, instant messaging, news aggregators and blogs, we can help them to leverage these in making a difference in reaching their goals and your institutional or enterprise goals. For those libraries that block access to the newest applications, they are positioning their technological presence as one which is poor. This is not a good position to take as a bridge in the digital divide for their communities.

Clearly, every one of the technologies listed in Web 2.0



above – RSS, Wikis, blogging, personalization, podcasting, streaming media, ratings, alerts, folksonomies, tagging, social networking software, and the rest – could be useful in an enterprise, institutional, or community environment and could be driven or introduced by the library. Yes, I know that many of these are already used individually in many of your environments. The beauty of Web 2.0 and Library 2.0 is the level of integration and interoperability that is designed into the interface through your portal or intranet. That's where the real power to enhance the user experience is. In order to take advantage of the concepts inherent in Library 2.0 is the imperative to not shy away from adding advanced functionality and features directly into the content. This would provide the context and workflow-oriented features that users will demand or are demanding already. Recently there has been a blog-based discussion about the need for renewed functionality in the ILS (integrated library system) and the OPAC.

John Blyberg, at Ann Arbor District Library, has promulgated an *ILS Customer Bill of Rights*, which asks for four things:

1. Open, read-only, direct access to the database
2. A full-blown, W3C standards-based API to all read-write functions
3. The option to run the ILS on hardware of our choosing, on servers that we administer
4. High security standards

Many of the requested aspects of Library 2.0 are already available in the SirsiDynix ILS interfaces for those who choose to update to current versions. SirsiDynix systems (Unicorn and Horizon) are well prepared to adapt to the 2.0 world. SirsiDynix has for many years offered open and allowed read-only, direct access to the database.

SirsiDynix systems ([Unicorn](#) and [Horizon](#)) have a library of APIs, and we have offered API training for years for any client to write anything they can imagine or for which they need customization for their particular environment. Loads of our clients do APIs, and they share APIs among themselves all the time and present them to each other at the user group meetings and big CODI and SuperConferences. It's not full blown W3C compliant yet, but we will be after the standard gets out there more fully.

SirsiDynix allows clients to use the hardware of their choosing, on servers that clients administer. Of course, there is no such thing as open hardware (yet?), but we try not to straightjacket our clients too much. We have always encouraged our customers to choose their own hardware within the specifications we have tested. We can't promise the software will work on everything – especially those platforms and hardware we haven't tested, but we're pretty flexible. We do offer hosted solutions especially for those smaller libraries that don't have the internal systems expertise. It's a useful option.

Lastly, we have pretty high security standards, but we don't think they're high enough, especially in today's challenging systems environments. Horizon 8.0 and Corinthian will be released in 2006 and have much higher security and two-way encryption standards. Unicorn 3.X has plans to implement higher security options as well.

While this list is largely focused on the systems librarian's needs, it does provide a foundation for Library 2.0 for end-users as long as we have Librarian 2.0 in place.

SirsiDynix also has the 2.0 foundation being developed. Both the [Enterprise Portal Solution™](#)

(EPS) and the Horizon Information Portal (HIP) were developed to allow both specialized proprietary solutions and open source or free applications to be integrated into the interfaces, portals, and portlets. These are the beginnings of the next generation of interfaces to move beyond the OPAC and integrate our content and tools into the overall information ecologies of communities and learning.



On the content side of the house, SirsiDynix's Rooms™ production and tools provide the opportunity to create and deliver content in context. You can also integrate many useful applications into the Room that empowers the user and places the librarian into the virtual learning and discovery space. The launch of School Rooms™ is a transformational approach to the world of schools, homework, and learning.

Librarian 2.0

Librarian 2.0 is the guru of the information age. Librarian 2.0 strives to

- Understand the power of the Web 2.0 opportunities
- Learn the major tools of Web 2.0 and Library 2.0
- Combine e-resources and print formats and is container and format agnostic
- Is device independent and uses and delivers to everything from laptops to PDAs to iPods
- Develop targeted federated search and adopts the OpenURL standard
- Connect people and technology and information in context
- Doesn't shy away from non-traditional cataloging and classification and chooses tagging, tag clouds, folksonomies, and user-driven content descriptions and classifications where appropriate
- Embrace non-textual information and the power of pictures, moving images, sight, and sound
- Understand the "long tail" and leverages the power of old and new content
- See the potential in using content sources like the Open Content Alliance, Google Print, and Open WorldCat
- Connect users to expert discussions, conversations, and communities of practice and participates there as well
- Use the latest tools of communication (such as Skype) to connect content, expertise, information coaching, and people
- Use and develops advanced social networks to enterprise advantage

- Connect with everyone using their communication mode of choice – telephone, Skype, IM, SMS, texting, email, virtual reference, etc.
- Encourage user driven metadata and user developed content and commentary
- Understand the wisdom of crowds and the emerging roles and impacts of the blogosphere, Web syndicasphere and wikisphere

First and foremost, Librarian 2.0 understands his or her users at a deep level – not just as pointers and clickers. Librarian 2.0 understands end users deeply in terms of their goals and aspirations, workflows, social and content needs, and more. Librarian 2.0 is where the user is, when the user is there. This is an immersion environment that librarians are eminently qualified to contribute to. Aspects of librarian influenced e-learning and distance education as implemented by our institutions and communities should allow us to contribute to the preparation of our users to acquire and improve their skills and competencies.

It is essential that we start preparing to become Librarian 2.0 now. The Web 2.0 movement is laying the groundwork for exponential business growth and another major shift in the way our users live, work, and play. We have the ability, insight, and knowledge to influence the creation of this new dynamic – and guarantee the future of our profession. **Librarian 2.0 – now.**

Stephen Abram, MLS is vice president, Innovation for SirsiDynix. He is an SLA Fellow and the past president of the Ontario Library Association and the immediate past president of the Canadian Library Association. In June 2003 he was awarded SLA's John Cotton Dana Award. Stephen would love to hear from you at stephen.abram@sirsidynix.com.

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Stephen Abram Book Published by ALA Editions

Collection of writings by library visionary is a guide for information leaders

HUNTSVILLE, Ala., Feb. 7, 2007 – SirsiDynix, the global leader in strategic technology solutions for libraries bringing knowledge to people and communities, announced today the publication by ALA Editions of “Out Front with Stephen Abram: A Guide for Information Leaders.” The book is a collection of Abram’s writings compiled by Judith A. Siess and Jonathan Lorig with a foreword by Jane Dysart.

Abram is the vice president of innovation at SirsiDynix and chief strategist for the SirsiDynix Institute. His expertise in foreseeing and predicting industry trends and challenges has made him one of the most popular writers and speakers in the library industry. Addressing the many audiences within the library profession – public, K-12, academic and special libraries, corporate librarians and technology specialists – Abram’s book offers a clear-sighted overview of the complexities of the information landscape of the 21st century.

Abram said: “I am so grateful to Judith Siess and Jonathan Loring for their work on this book. I hope readers will be inspired to think outside the box and explore the many ways that technology can be used in libraries today.”

Abram’s articles are organized under four themes in the book: advocacy, technology, communities and generations, and the future. The book also includes an extensive bibliography of works, as well as a list of Abram’s recommended readings.

Luke Rosenberger, technology librarian for North Harris Montgomery Community College in The Woodlands, Texas, said: “When Stephen Abram has something to say, particularly about ideas and innovation in our field, you can bet it will be worth paying attention to.”

Books will be for sale at an author signing with Abram at the SirsiDynix Institute Executive Conference at The Broadmoor Hotel in Colorado Springs, Colo., on Sunday, Feb. 18, 2007. For more information on the conference, visit http://www.sirsidynixinstitute.com/exec_2007.php.

Books are also available online at www.alastore.ala.org.

"Q & A With Stephen Abram"

YALSA's journal *Young Adult Library Services*.

The issue of YALS focuses on ways to advocate for teens through library services and we think your contribution will really highlight the theme.

YALS 1. What are the essential library services we should be offering to Millennials?

SA Essential is a difficult word. Thinking skills, information literacy training and great collections are essential. However, I suspect that the questions really lead to helping us to understand what technologies actually align with Millennial skills and behaviors and enhance learning and development. So, in that context, essential would include:

1. Offer advanced web access with decent broadband speed. You can't support all learners if your access is worse than most of their peers home systems. Wireless is becoming essential. Rural and remote areas are not exempt from this.
2. Place few limits placed on the browser's functionality. Try to avoid thinking that control trumps exploration.
3. Use instant messaging with fellow students, peers, teachers, librarians, etc. E-mail is so last century. This is a mainstream technology.
4. Blog. Both ways. Leave comments on.
5. Develop learning portals that support classroom activities, curriculum and homework. Partner between public and school libraries. We're in the same business and serve the same users. Serve parents as well as teens for homework helper applications.
6. Ensure that there is community adoption of electronic content sources, best of the web lists, streaming media, online courseware, etc. Then make the world aware of it. Go beyond just marketing article databases.
7. Support community-wide experiments to understand the roles played by new technologies like gaming, iPod, iTunes servers, etc.

YALS 2. What is the best thing we can do to advocate for our teen library customers?

SA Again 'best' is such a situational word. Every child or learner is different and every school and community has different strengths, challenges and initiatives. That said, of course I have an opinion! So here goes:

1. Advocate for light (or even no) filtering. Teens can't learn how to deal with the world of information if they never see examples of the range.

2. Advocate for tools that align with their comfort levels. For example disabling IM on library PC's just makes the library appear dysfunctional or, worse, lame.
3. Advocate for tools that support the full range learning styles and technology that plays it. Our text-based collections are totally necessary but many (maybe most) learners need interactivity, visuals, sound, etc. Public library and school PC's that don't support these formats or restrict their use, are misaligned with the needs of teens.
4. Advocate to teens in their spaces. Learning happens in social environments as much as in formal environments. Some environments straddle both. So, review how you might work with or be present or available in such spaces as MySpace.com, The Facebook or Second Life. As of March 1, MySpace was headed to be the most visited site on the web by ALA 2006 with 2.5 times the traffic of Google.
5. In public libraries reduce friction points that add nothing to the user experience. Do we really need to have so many rules that disrupt our image with teens. Let's advocate for better relationships with this huge market. Consider building a teen advisory council and maybe even have them develop training sessions for your teen facing staff.

YALS 3. In your article, "Born with the Chip," you discuss collaboration as a key characteristic of the way NextGens learn. How can we as librarians capitalize on this trait?

SA Kids are brought up in what is essentially a collaboration-oriented education. They do much of their work in teams. They carry their high comfort levels with collaboration into their social and work lives. Librarians can capitalize on this by offering services through the tools that support teens' collaboration behaviors. That means not only being comfortable with instant messaging clients. You can't just choose one like MSN, AIM or Yahoo! You need to support it all. This can be done using clients like Trillian and GAIM or web based services like Meebo that aggregate the major IM services and clients. Then you're cooking with gas. Those libraries that have adopted full or limited IM reference are seeing the pay-offs. As these grow you can add collaboration services like professional virtual reference that lets you track transcripts and mine the data for insights into user behaviors or simple co-browsing software like Jybe. For educational purposes public libraries can offer information literacy training in MS LiveMeeting or Webex to align with school based programs in Blackboard/WebCT, etc. Lastly, you should review your physical space. Are there too many carrels and too few round tables? Can the tables support group technology? Are there social spaces? Is it built to control sound and limit annoyances for other users? Are they given a respectful distance from others for privacy or are teens treated to a fishbowl environment?

YALS 4. What are the implications of the self-service model for traditional librarian-delivered services?

SA Self-service is a huge opportunity. There is not a librarian or library worker in the world today who will tell you that have enough hours to accomplish everything they need to do. So, given that fact, why would we continue to waste time buried in non value-added tasks when they can be automated to free up our time to do programming that makes an impact? Self checkout, circulation tools on PDA's, RFID, PC booking software, online holds, e-reserves, e-books circulation, etc. all offer the opportunity to serve more patrons at lower costs. Then we can focus on what is actually strategic. What programs engage the kids and bring them into the library? How many messages can we deliver at once? When a library offers a Rock the Stacks local band night after hours, it isn't really just about the teens and music. You engage them in the library, link between teens and the library, improve the relationship with current and future users and even circulate a few items. No one leaves without a transformed opinion. The same things happen when libraries have gaming collections and gaming events. Some of our traditional services are fantastic. Some are musty. Rita Mae Brown wrote that insanity is doing the same things in the same way that we have always done and expecting different results. If we want better results, we have to experiment with some new ideas.

YALS 5. What are some ways the "Librarian 2.0" can facilitate communication between Millennials and reluctant librarians and administrators?

SA Call them on it. Ask if the library is serious in gaining the attention of the largest demographic cohort in history? This generation of Millennials is larger than the Boomers – and it's growing through immigration. All other markets are shrinking. Are libraries ready to leave them behind? What about when they're voting for library budgets? It's just a foolish attitude to take. Society needs them and they're an amazing generation of smart talented kids. So here are a few small techniques that can help n the journey to respecting this major group of users:

- Have a teen advisory board. And, don't just pick friendly, local users. Make it reflect your community of teens. Listen to them. Don't just talk at them. Don't be defensive. Respect their experience.
- Demonstrate that you listen. Take action on what they say about their needs. Be open about changing some of your 'rules'.
- Have annual panels of teen users interact with all staff. I have done this many times and it never ceases to transform opinion. It can work like a minor intervention.
- Play with their tools. Just play. You'll start to understand. Don't kill understanding with policies, committees, and the like before you understand the overall dynamic. Don't study it to death though. That's not your goal either. Lose control for just a little while and start to learn anew.

- Have people on staff be assigned to talk to a half dozen teens in the family or neighborhood. Bring it back to the ranch for brown bags sessions. Ask questions that explore their behaviors rather than judge them.
- Serve as an example and role model – blog, IM, podcast. Model the behaviors and share them. Change will happen.

YALS 6. How can we retain the "magic of librarianship" virtually or through digital devices?

SA A lot of the conversations for the past few years have talked about our 'bricks' and 'clicks' strategies. I have added talking about 'tricks' to this in the past few years. The magic of librarianship cannot be allowed to go away in the virtual world. If the majority of our traffic and services being delivered through a presence now, we have to make sure that the librarian is there too. That means more virtual reference, more IM, more ASK A LIBRARIAN buttons, etc. It's necessary for survival and evolution. It's also about understanding what our 'magic' is. Some librarians spend a great deal of their efforts defining themselves as information professionals, people who deliver information and organize it. I prefer to think that's a means to an end. I like to think librarians are 'question' professionals. We improve the quality of the question and everything else flows from that. Excitingly, we can now start to more deeply understand our role in the experience economy. As we create new and revitalized experiences in our physical and virtual presences, we generate the magic that creates the knowledge-based society. Teens will experience more of this new world than us. It's incumbent on us to lay a great foundation.

Stephen Abram, MLS, is the immediate President of the Canadian Library Association, past president of the Ontario Library Association, and is Vice President of Innovation for SirsiDynix. He would love to hear from you at stephen.abram@sirsidynix.com.

Any mediagraphy for this session should include the *Library Journal* article: *Born With A Chip* by Stephen Abram and Judy Luther

<http://www.libraryjournal.com/article/CA411572.html?display=searchResults&stt=001&text=born+with+the+chip>

All of my other articles and presentations are hosted at:

Stephen Abram's Articles and Presentations
http://www.sirsi.com/Resources/abram_articles.html

Folks could also be directed to my blog, Stephen's Lighthouse
<http://stephenslighthouse.sirsi.com/>

Public Library Geeks Take Web 2.0 to the Stacks

Beverly Hanly ✉03.29.07 | 2:00 AM

When the IT director at North Carolina's Charlotte & Mecklenburg County public library began training staff in the latest web technologies, she lured reluctant participants with bribes -- a free MP3 player and the chance to win a laptop.

Six months later, the program they developed is the real prize. Learning 2.0, developed by public services technology director Helene Blowers, has become a surprise grassroots hit, available for free on the web and adopted by dozens of other libraries around the globe.

"The last thing we want is for people to come into our libraries and ask about Flickr or *Second Life* and be met with a blank look," said Christine MacKensie, director of the Yarra Plenty Regional Library in Melbourne, Australia, which just finished a four-month version of Learning 2.0. "And they certainly won't now."

Google and Microsoft are racing into libraries to digitize the world's books, but the success of Learning 2.0 shows that the human problem of retraining workers is often being tackled from the ground up.

Recognizing that librarians need to know how to participate in the new media mix if libraries are to remain relevant, Blowers challenged her 550 staffers to become more web savvy. Using free web tools, she designed the program and gave staff members three months to do 23 things.

They created blogs and podcasts, tried out Flickr, set up RSS feeds, learned about wikis, uploaded video to YouTube, played with image generators and Rollyo, and explored Technorati, tagging and folksonomies.

"Librarian avatars were popping up all over the blogs," said Blowers.

Although her original goals for Learning 2.0 were touchy-feely "E's" -- exposing staff to new tools, encouraging play, empowering individuals, expanding the knowledge toolbox, eliminating fear -- the effects were both practical and financial.

"We don't have to wait for some training company to come along and say, 'For \$20,000 we'll show you how this stuff works,'" said Michael Stephens, who wrote *Web 2.0 and Libraries: Best Practices for Social Software*. "Helene put it on the web so anyone can use that program."

Libraries all over the world are doing just that -- moving the entire Learning 2.0 program to their own websites. The program has been duplicated by university and community library systems in Sweden, Australia, Canada and Denmark. In the United States, programs are underway in South Carolina, Florida, Maryland and California. Even the Combined Arms Research Library, a military repository, is trying it.

Now Blowers' program is spreading beyond libraries (even virtual ones, like the teen library in Second Life teen library in Second Life): A public relations firm wants to set up a Learning 2.0 program for its staff, and several universities and an elementary school want to use the system to educate teachers, she said.

Michael Casey, division director of technology services for the Gwinnett County Public Library in Georgia, calls this movement Library 2.0.

"For libraries, the service aspect makes it as akin to Business 2.0 as to Web 2.0," said Casey, who writes LibraryCrunch. "The 2.0 technology makes it possible to offer a lot without all the licensing and maintenance. It's all free, it's browser-based -- it's a technician's dream."