



BERKELEY PUBLIC LIBRARY BOARD OF LIBRARY TRUSTEES

REGULAR MEETING
Wednesday, 06/06/2018

AGENDA
6:30 PM

Tarea Hall Pittman South Branch
1901 Russell Street

I. PRELIMINARY MATTERS

- A. **Call to Order**
- B. **Public Comments** – Speakers are allowed 3 minutes each for up to 10 speakers; if more than 10 individuals have filled out and submitted cards to speak, the time for all speakers will be reduced to 2 minutes per person and if more than 20 individuals have submitted speaker's cards, the time per person will be reduced to one minute each, for a maximum of one hour of public comment.
- C. **Comments from Library Unions** – For regular meetings of the BOLT, representatives from the three unions representing Library employees may address BOLT, with a total time limit of 15 minutes. If all three (3) unions have representatives present and wish to speak, each union shall receive 5 minutes to address BOLT. If only two (2) unions have representatives present and wishing to speak, each union shall receive 7.5 minutes to address BOLT, for a total of 15 minutes. If only one (1) union has representatives present and wishing to speak, that union shall receive 15 minutes to address BOLT. The Secretary shall, at the start of the Comment from Library Union item, ask union representatives who wish to speak to identify themselves and which union they represent. The Secretary shall then determine the appropriate allocation of speaking time according to the rules stated herein.
 - i. Public Employees Union, LOCAL 1
 - ii. SEIU, LOCAL 1021 (Maintenance and Clerical Units)
 - iii. SEIU, LOCAL 1021 (Community Services and PTRLA Units)
- D. **Comments from Board of Library Trustees**

II. CONSENT CALENDAR

*The Board will consider removal and addition of items to the Consent Calendar prior to voting on the Consent Calendar.
All items remaining on the Consent Calendar will be approved in one motion.*

- A. **Approve Minutes of the May 2, 2018 Regular Meeting**
Recommendation: Approve the minutes of the May 2, 2018 Regular Meeting of the Board of Library Trustees.
- B. **Contract Amendment: No. 8852 Stuart's Clear Choice**
Recommendation: Adopt the resolution authorizing the Director of Library Services to execute an amendment to Contract No. 8852 with Stuart's Clear Choice Cleaning, Inc. to increase the contracted not-to-exceed amount to \$75,000 for cleaning of solar panels, clerestory windows, skylights and other exterior windows, as well as the power washing of external entry areas, and to extend the term of the Contract to December 31, 2020.
- C. **Library Community Meeting Room Use Policy & Guidelines**
Recommendation: Adopt the revised Berkeley Public Library *Rules and Regulations for Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events* Policy.
- D. **RFP: Public PC Time and Print Management System**
Recommendation: Adopt the resolution to authorize the Library to issue a Request for Proposals for a new Public PC Time and Print Management System.

III. Action Calendar

- A. **Recommendation to City Council on FY 2019 Library Tax Rate**
Recommendation: Adopt a resolution to recommend that the Berkeley City Council set the FY 2019 tax rate for the Library Services Tax at \$0.2185 (21.85 cents) per square foot for dwelling units and \$0.3303 (33.03 cents) per square foot for industrial, commercial, and institutional buildings, based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67%.
- B. **Revision to Biennial Budget FY 2019 and FY 2020 – Library Tax Fund (301)**
Recommendation: Adopt a resolution revising the adopted Library Tax Fund (301) biennial budget for fiscal years 2019 and 2020 to incorporate projected revenue based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67%.

C. Circulation Policies Update

Recommendation: Adopt the resolution approving update and simplification of the Library fee schedule. The new schedule expands fine free practices at Berkeley Public Library to include all items except for tools, laptops, Cornerstone Kits, and Link+ materials. Furthermore, fines for late return of tools will be simplified into three categories. The proposal also includes removal of the \$10 Processing Fee that is charged when people lose materials and the \$5 Maximum Late Fee that is applied when an item goes to "Billed" status after 42 days of being overdue. Patrons will continue to be billed the replacement cost of items that they do not return.

IV. INFORMATION REPORTS

- A. **FY18 – 3rd Quarter YTD Budget Report** – Dennis Dang
- B. **Bylaws Sub Commission Oral Report** – Sophie Hahn and Judy Hunt
- C. **Organizational Review Oral Report** – Elliot Warren, Acting Director of Library Services
- D. **Monthly Library Director's Report** – Elliot Warren, Acting Director of Library Services
- E. **Library Events** – Calendar of events and press releases for various Library programs are posted at <http://www.berkeleypubliclibrary.org>

V. AGENDA BUILDING

The next meeting will be a Regular Meeting held at 6:30 PM on Wednesday, July 18, 2018 at the **Tarea Hall Pittman South Branch, 1901 Russell Street, Berkeley.**

VI. ADJOURNMENT

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Communication Access Information



This meeting is being held in a wheelchair accessible location. To request a disability-related accommodation(s) to participate in the meeting, including auxiliary aids or services, please contact the Disability Services specialist at 510-981-6418 (V) or 510-981-6347 (TDD) at least three business days before the meeting date. Please refrain from wearing scented products to this meeting.

I hereby certify that this amended agenda for the special meeting of the Board of Library Trustees of the City of Berkeley was posted in the display cases located at 2134 Martin Luther King, Jr. Way and in front of the Central Public Library at 2090 Kittredge Street as well as on the Berkeley Public Library's website on May 31, 2018.

//s//

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustees

For further information, please call (510) 981-6195.

COMMUNICATIONS

Communications to Berkeley boards, commissions or committees are public record and will become part of the City's records. **Please note: e-mail addresses, names, addresses, and other contact information are not required, but if included in any communication to a City board, commission or committee, will become part of the public record.** If you do not want your e-mail address or any other contact information to be made public, you may deliver communications via U.S. Postal Service or in person to the secretary of the relevant board, commission or committee. If you do not want your contact information included in the public record, please do not include that information in your communication. Please contact the secretary to the relevant board, commission or committee for further information.

Any writings or documents provided to a majority of the Commission regarding any item on this agenda will be made available for public inspection at Berkeley Public Library Administration Office located at 2090 Kittredge Street, 3rd Floor Admin Wing, Berkeley, CA 94704.

Agendas and agenda reports may be accessed via the Internet at www.berkeleypubliclibrary.org/about/board-library-trustees and may be read at reference desks at the following locations:

Central Library - 2090 Kittredge Street
Claremont Branch – 2940 Benvenue Avenue
West Branch – 1125 University Avenue
North Branch – 1170 The Alameda
South Branch – 1901 Russell Street



MINUTES
Berkeley Public Library - Board of Library Trustees Regular Meeting
Wednesday, May 2, 2018 6:30 PM

Tarea Hall Pittman South Branch – 1901 Russell Street

Board of Library Trustees:

Diane Davenport, President	Sophie Hahn
John Selawsky, Vice President	Judy Hunt
	Amy Roth

I. PRELIMINARY MATTERS

A copy of the agenda packet can be found at <http://www.berkeleypubliclibrary.org/about/board-library-trustees>

1. Call to Order: 6:32pm.

Present: Trustees Davenport, Hahn, Hunt and Selawsky.

Absent: Trustee Roth.

Also Present: Elliot Warren, Acting Director of Library Services; Sarah Dentan, Library Services Manager; Anna Gonzalez, Library Services Manager; Dennis Dang, Admin and Fiscal Services Manager; Jay Dickinson, Circulation Services Manager; Alicia Abramson, Information Technology Manager; Danielle McMillian, Assoc. Human Resources Analyst; Linda Sakamoto-Jahnke, Literacy Program Coordinator; Dan Beringhele, Librarian II; Eve Franklin, Administrative Secretary.

2. Public Comments: 0 speakers.

3. Comments from Library Unions:

- A. SEIU, LOCAL 1021 (Community Services and PTRLA Units) – 0 speaker.
- B. Public Employees Union, LOCAL 1 – 0 speakers
- C. SEIU, LOCAL 1021 (Maintenance and Clerical Units) – 3 speaker

4. Comments from Board of Library Trustees

- A. Trustee Hahn – Spoke about sticking to rules about discussing non-agendized items.
- B. Trustee Selawsky – Spoke about using the Tool Lending Library and the knowledgeable staff. Thank you to staff for the work on ongoing stucco project and protecting safety of staff, patrons and neighborhood.
- C. President Davenport – Friends of the Library Big Book Sale is this weekend.
- D. Trustee Hunt – Reported on her visit to the Claremont Branch.

II. CONSENT CALENDAR

Action: M/S/C Trustee Hunt / Trustee Selawsky to adopt resolution # R18-019 to approve the consent calendar as presented.

Vote: Ayes: Trustees Davenport, Hahn, Hunt, and Selawsky. Noes: None. Absent: Trustee Roth. Abstentions: None.

A. Approve Minutes of the April 4, 2018 Regular Meeting

From: Acting Director of Library Services

Recommendation: Adopt a resolution to approve the minutes of the April 4, 2018 Regular Meeting of the Board of Library Trustees as corrected.

Financial Implications: None.

Contact: Elliot Warren, Acting Director of Library Services

Action: Adopted resolution # R18-020.

B. Contract Amendment: No. 9883 Califa Group for Advanced Network Data Services

From: Alicia Abramson, Library Information Systems Administrator

Recommendation: Adopt a resolution authorizing the Director of Library Services to execute Contract No. 9883 with Califa Group ("Califa"), a California public benefit corporation, to increase the contracted not-to-exceed amount to \$400,000 for the continued provision and maintenance of the Library's connection to the "CalREN" high-speed broadband fiber network, and to extend the term of the Contract to June 30, 2020.

Financial Implications: see report.

Action: Adopted resolution # R18-021

III. INFORMATION CALENDAR

A. Central Library Remediation Work Report

Stucco removal will cost more than Director and City Manager can approve, and will need to be approved by City Council.

From: Acting Director of Library Services

Contact: Elliot Warren, Acting Director of Library Services

Action: Received

B. Bylaws Sub Commission Oral Report

Bylaws Sub Commission Meeting will be held on May 3 and will include a first draft for review.

From: Sophie Hahn and Judy Hunt

Contact: Trustees Sophie Hahn and Judy Hunt

Action: Received

C. Organizational Review Oral Report

Communications Training sessions will take place in June; all BPL staff will be expected to attend one 1/2 day session.

The contract for the formal organization review is in a holding pattern. The City of Berkeley contract boilerplate language is very strict and we are negotiating with the vendor.

From: Acting Director of Library Services

Contact: Elliot Warren, Acting Director of Library Services

Action: Received

D. Staff Report – Literacy Services

Linda Sakamoto-Jahnke, Literacy Program Coordinator provided a presentation (Attachment 1)

From: Literacy Program Coordinator

Contact: Linda Sakamoto, Literacy Program Coordinator

Action: Received

E. Staff Report –ESL Conversation Club Program

Dan Beringhele, Librarian II provided a presentation (Attachment 2)

From: Librarian

Contact: Dan Beringhele, Librarian

Action: Received

F. Monthly Library Director's Report

From: Acting Director of Library Services

Contact: Elliot Warren, Acting Director of Library Services

Action: Received

G. Library Events

From: Acting Director of Library Services

Contact: Elliot Warren, Acting Director of Library Services

Action: Received

IV. AGENDA BUILDING

- BOLT responsibility during Public and Union Comment periods.
- Tool Lending Library Update
- Annual Surveys

V. ADJOURNMENT

Adjourned at 7:46 PM.

This is to certify that the foregoing is a true and correct copy of the minutes of the regular meeting of May 2, 2018 as approved by the Board of Library Trustees

//s// _____

Elliot Warren, Acting Director of Library Services, acting as secretary to BOLT

Attachments:

1. Literacy Services Presentation
2. ESL Conversation Club Program Presentation

ESL CONVERSATION CLUB











Berkeley READS is a free service of the Berkeley Public Library since 1987. The Mission of the California Library Literacy Services (CLLS) is to enable Californians of all ages to reach their literacy goals and use library services effectively. Hundreds of trained volunteer tutors have served thousands of adult learners through one-on-one and small group instruction for English-speaking adults in reading, writing and computer education, including those from low-income, at-risk and the challenged backgrounds.

The target service areas include West, South and Central Berkeley. Students range from 16 to 84 and reflect economic and social urban diversity, as well as the thriving community of new immigrants.

"I remember your not even trying to read for years. It would be easy to continue to hide your literacy issues but instead, you tell anyone who will listen... Wear your success like a banner because it will encourage someone else to take their first step...."

A Day at Berkeley READS



Tutor helped with the immigration process in getting her children to the USA

Annika is from ToolWorks



Edivan uses the Central 2nd floor magnifying machine



Health Literacy



Family Class

Cultural Arts Literacy



Seeded by a FY BALIS grant
"I wish they had something like this when I was growing up..."

BAM Director of Education and Academic Relations: ***"I cannot tell you how rewarding it was to meet and talk with your group. It was truly the highlight of the whole week for me."***

Berkeley Builds Readers



At eight outreach sites- Head Start, Bahia, Centro Vida, and BUSD Early Childhood Development Centers-serving 23 classrooms and 450 children ages 2-5 years, volunteers conduct monthly story visits, book distributions, on-site tutoring. BPL Foundation and FOL fund volunteer training, operational resources and children's book distribution for staff/parents, and parent workshops.

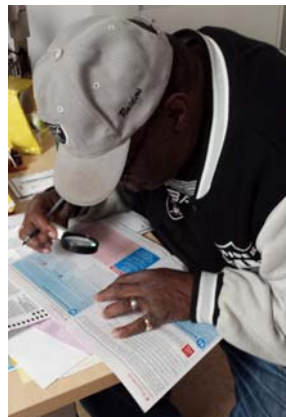
BBR "Daddy and Me" story visit



Special Projects and Partnerships



**League of Women
Voters: Easy
Voter Guide**



Adult Learner Leadership Institute

**2015 Spirit of the
League Award at 16th
Annual Community
Luncheon**



New Resume Project

The New Resume Project

Creating a resume that gets read and noticed is hard for anyone and can be especially challenging for adult literacy students. Program staff have reported that, for many students, searching for a job can be especially discouraging.

A team of adult students at Berkeley READS decided to dig into this situation and see how they could help fellow students. They developed The New Resume Project. Building from their own experiences as job seekers, they developed a customized workshop for adult literacy students and other community members who are job seeking or getting their thoughts together about their career.

One of the key insights of the project is helping adult students claim the value of their lived experience, i.e., their "life certificates." This is the source of the resilience, grit and maturity many employers seek but do not know how to put into job descriptions.

The New Resume Project has a step-by-step workbook that combines best practices for job seekers with the kind of peer-to-peer encouragement that makes a difference. The workshop has been piloted at Berkeley READS, Berkeley Adult School and the Recovery Café in San Jose. Now we're ready to go on the road.

Do you work with a group of adults who would like to better reflect their skills and experience on their resume?

Contact Linda Sakamoto-Jahnke at Berkeley READS to schedule a workshop:
lsakamoto@berkeley-reads.org (708) 961-6273.

BOARD OF LIBRARY TRUSTEES
RESOLUTION NO.: R14-053

CELEBRATION OF ADULT LITERACY AWARENESS MONTH IN SEPTEMBER

The Public Library has operated an adult and family literacy program effectively for many years. This program, which has come to be known as Berkeley READS, has served all of the Berkeley residents who need it. The city's greatest resource is its people; and the stability of our community are significantly affected by the ability of our residents to read. The correlation among literacy, individual self-esteem, and the vitality of our city is clear. The Public Library has utilized the services of volunteer tutors since 1987 to help our residents improve their literacy skills.

**BOLT Proclamation for Adult
Literacy Awareness Month**

FY 15/16 Pacific Library Partnership grant. Presentations at Berkeley Adult School, Recovery Café, Solano County and Oakland Public Libraries

1st Annual Bay Area Book Festival



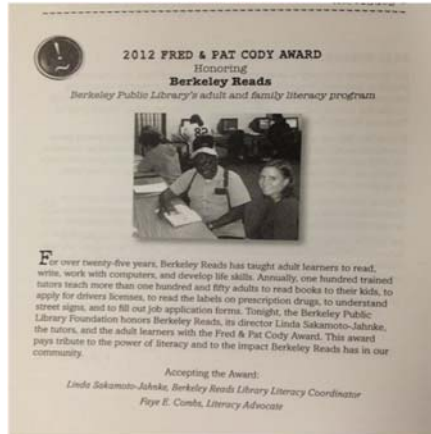
A Journey to Literacy: Adult Learners in Conversation

Listens to a panel of adult learners who share their journeys of reading books that inspired their lives and opened new worlds.

Saturday, June 6th 2015
1:00 PM

Berkeley Public Library
Community Meeting Room / 3rd Floor

Presented by:
Bay Area Library Adult Literacy Programs



Cody Award

66th Annual Conference: Literacy Research Association Berkeley READS volunteers working on their PhDs at U.C. Berkeley: *Language and Literacy Practices at a Public Library*

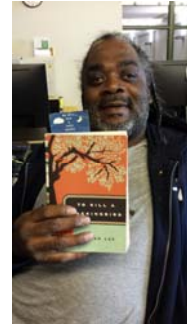
ESL Conversation Club @ West & Central



From an ESL Club and Berkeley READS volunteer: ***"The work you are doing is so important, it has been an honor to participate in the group and see so much positive energy be created at the conversation club."***

Learner Accomplishments

Options Graduation



A new job

Purchased his first book



Selected and checked out books for the first time

Black Infant Health



Ralph, an adult learner leader in his community

New Bridge Residential Treatment Program



Finalist : Writer to Writer CA State Library competition
Odell Stanifer (Berkeley Public Library)
"Monster" by Walter Dean Myers



Hi Walter,

I am writing you in regards to the book *Monster* and I would like to let you know how much it related to me concerning the lawyers, prosecutors, and judges, and being in jail...I am 42 and this is the first book I have ever read on my own. I listened to the story on tape while I read along and it caught my attention immediately because it was so much like my life. Thank you for writing a story regarding a young man being in a situation like mine.

Sincerely,
 Odell Stanifer



Hosea's first library card



Berkeley Adult School library card registration

Cleveland Williams

Title: Alabama Moon

Author: Watt Key

I chose this book because it ties to Martin Luther King who made things better for people...you have to believe in people...Just like when you don't know how to read or write, you feel you are by yourself but you find out there are others...And let someone teach you.





CONSENT CALENDAR

June 6, 2018

TO: Board of Library Trustees

FROM: Dennis Dang, Administrative and Fiscal Services Manager

SUBJECT: Contract Amendment: No. 8852 Stuart's Clear Choice

RECOMMENDATION

Adopt the resolution authorizing the Director of Library Services to execute an amendment to Contract No. 8852 with Stuart's Clear Choice Cleaning, Inc. to increase the contracted not-to-exceed amount to \$75,000 for cleaning of solar panels, clerestory windows, skylights and other exterior windows, as well as the power washing of external entry areas, and to extend the term of the Contract to December 31, 2020.

FISCAL IMPACTS OF RECOMMENDATION

The not-to-exceed amount of the requested amendment is \$75,000. Funding is available from Fund 301 and is budgeted in the Facilities Maintenance division's 2018 and 2019 fiscal years expenditure budgets under budget code 301-9103-450.30-43 (Building and Structures Maintenance Services).

BACKGROUND

The existing contract with Stuart's Clear Choice Cleaning Service, Inc., begun on December 12, 2011, has been amended four times and is scheduled to expire on December 31, 2018. Prior to the existing contract, the Library contracted with Stuart's Clear Choice Cleaning Service, Inc. on Contract No. 8530 for a short term contract that extended from January 3, 2011 through February 11, 2011 with the sole purpose to prepare the Central Library for that year's Berkeley Public Library Foundation Authors Dinner.

Under existing contract terms, Stuart's Clear Choice has provided regularly scheduled and on-call cleaning services at the five Library locations.

CURRENT SITUATION AND ITS EFFECTS

Since execution of the existing contract with Stuart's Clear Choice the Library has engaged this vendor to provide scheduled and on-call services for cleaning of solar panels, clerestory windows, skylights and other exterior windows, as well as the power washing of external entry areas at all Library facilities. To date the contract agreement has been amended four times to increase the not-to-exceed value and or extend the termination date. Prior to amending, the Library's Senior Building Maintenance Supervisor solicited pricing quotes from other local vendors to ensure an amendment's pricing was competitive and current.

The City and Library considers the services contracted with Stuart's Clear Choice as high risk due to necessary equipment, building heights and hazardous conditions for roof and window access, and the location of the rooftop solar panels. The Library considers maintaining the cleanliness of Library facilities and the efficiency of the solar panels as important public indicators reflecting (in part) the overall importance that the board and staff assign to their mission of delivering high quality public library services.

ALTERNATIVE ACTION

Allow contract to expire and pursue a formal public solicitation.

Attachments

1. Resolution

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-___

CONTRACT AMENDMENT: NO. 8852 STUART'S CLEAR CHOICE

WHEREAS, the Library and Stuart's Clear Choice Cleaning Service, Inc., entered into Contract No. 8852 at a not-to-exceed value of \$50,000 and which began on December 12, 2011 and has been amended four times and is scheduled to expire on December 31, 2018; and

WHEREAS, to date Stuart's Clear Choice Cleaning Service, Inc. has successfully fulfilled contracted services to provide scheduled and on-call cleaning of solar panels, clerestory windows, skylights and other exterior windows, as well as power washing of external entry areas at all Library locations.

NOW THEREFORE, BE IT RESOLVED that the Board of Library Trustees of the City of Berkeley hereby authorizes the Director of Library Services to execute an amendment to Contract No. 8852 with Stuart's Clear Choice Cleaning Service, Inc. to increase the contracted not-to-exceed amount to \$75,000 for scheduled and on-call services, and to extend the term of the Contract to December 31, 2020.

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Diane Davenport, President

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustees

BERKELEY PUBLIC LIBRARY POLICIES

**SUBJECT: Rules And Regulations For Use Of Library
Grounds, Buildings, And Equipment For
Meetings And Other Events**

ORIGINAL DATE:	07/13/2005
BOLT Resolution #:	17-072
REVISED DATE:	12/06/2017
PAGE:	1 of 4

I. POLICY

The Berkeley Public Library provides community meeting rooms for the instructional, recreational, and research needs of the Library and the Berkeley community. The American Library Association's Library Bill of Rights states, "Libraries which make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use." This policy is intended to support that principle.

Groups and organizations may use meeting rooms when they are not needed for activities sponsored by the Library. Use of Library facilities by groups and organizations not affiliated with the Library or its official support organizations is restricted to the community meeting rooms and the Central Library Electronic Classroom. A group is defined as six or more people. No group may use the meeting rooms in a way that would be disruptive of Library operations. Permission to use the meeting rooms does not imply Library endorsement of the goals, policies, or activities of any group or organization. The Library reserves the right to revoke permission previously granted if deemed operationally necessary.

Rules for use of the Central Library Electronic Classroom are contained within the Electronic Classroom Use and Reservation Policy.

Information regarding the policy for use of meeting rooms will be available to the public and posted on the Library's public web site.

II. ELIGIBILITY

Permission to use the Library's meeting rooms may be granted to Berkeley-based civic, cultural, educational organizations or businesses, or to locally-operating government agencies, departments or commissions. The Director of Library Services may approve the use of meeting rooms for organizations or groups directly serving libraries, librarians and the interest of the library community but not based locally.

1. To qualify as a Berkeley based group, organization or business, the group leader or person applying for use of the classroom must submit proof of address, such as a photocopy of a utility bill or letter addressed to the individual, group or business, or submit for inspection a driver's license or state issued identification card at the time of application. Organizations not located in Berkeley must submit proof of regular operation or programs within Berkeley such as sample brochures, newsletters, or web site printouts. Informally organized groups of Berkeley residents may apply for meeting room use, as long as all other eligibility rules and conditions for use are followed.
2. Any group or organization applying for the rooms must guarantee via signature or online agreement that their organization does not discriminate in membership, or in service provision, on the basis of race, creed, color, religion, political affiliation, gender, sexual orientation, national origin, or disability, or in employment on a basis prohibited by California law

III. ISSUANCE OF PERMITS

3. Applications for use of the meeting rooms will be made available on the Library's website and at the Library, and will be approved by the Library Director or an authorized representative according to the following priorities:
 - a. Library sponsored or related meetings, programs, etc.,
 - b. Government agency sponsored programs serving the Berkeley community,
 - c. Non-profit public and/or social service organizations offering a free, open-to-the-public event (e.g. job fair, training event, educational series) and located in or operating on a regular basis in the City of Berkeley.
 - d. Berkeley-based for-profit entities offering a free, open-to-the-public event (e.g. job fair, training event, educational series).
4. The Director of Library Services or an authorized representative, e.g. the Deputy Director, Library Manager, or Branch Librarian, has authority to issue permits for the use of Library buildings, or grounds.
5. An authorized representative of the organization should submit the request at least two weeks in advance on an official application form. This policy does not guarantee the applicant the facility or the time requested. Official request forms for meeting room use may be submitted online.
6. Permits may be issued for up to three consecutive months from the date a reservation is requested. Renewal applications can be submitted at the end of the three-month period, but prior use of meeting rooms does not entitle applicants to future use. Groups should not expect to reserve in advance the same time period each month for extended periods. Meeting room use is limited to once a month. These restrictions do not apply to Library functions.

IV. CONDITIONS OF USE

7. Meeting rooms are not intended to be used for private events such as social events, parties, memorial services, or fundraisers, etc.
8. Permits are issued for specific hours and dates. When the authorized function is over, program organizers are responsible for vacating the facilities. Rooms will not be opened before the appointed time. Groups should schedule the reservation to include time for set-up and clean-up.
9. Except for events sponsored by the Library, its official support organizations, another City of Berkeley department with City staff present, or (for the purpose of hosting an official polling place) the Alameda County Registrar of Voters, the meeting rooms may only be used during the Library's open hours. Except for events sponsored by the Library and its official support organizations, the Central Library meeting room may only be used during the Library's open hours. Thirty minutes before closing the meeting room should be cleared, with all furniture replaced as required.
10. Due to fire codes, the room capacity may not be exceeded.
11. Permits for use of Library facilities for meetings shall be granted only on condition that meetings are open to the public unless they are for Library training purposes. The Library reserves the right of library staff to monitor any meetings held in its facilities (except lawful executive sessions of governmental bodies). A list of all meetings booked may be posted in a public area in the Library and on the Library's web site.

12. The following are not allowed in Library meeting rooms:

- a. Fees: No group using the community meeting rooms may charge a fee or ask for donations. The facilities will not be available for fund-raising events, except when the event or program is sponsored by the Friends of the Library or the Library Foundation, and approved in advance by the Director of Library Services. The Director of Library Services may approve the use of meeting rooms when an accredited public educational institution or professional organizations and library service affiliated groups must charge tuition for specific Library-related training courses or other associated costs directly related to the program.
 - b. Sales: No items or services may be sold or advertised, except for during Library sponsored programs in which titles by a featured speaker/performer may be offered for sale by the speaker/performer or by the Friends of the Berkeley Public Library, the Berkeley Public Library Foundation or a vendor acting on behalf of either of those organizations). The speaker/performer must notify the Library when planning to offer titles for sale. In all cases, the speaker/performer or his/her representative collects payment, not library staff. Library support organizations, with the Director of Library Services approval may collect fees from the sale of books and other items in the library during scheduled events, including the sale of books in the meeting room.
 - c. Smoking: Smoking or burning of items (incense, candles, etc.) is prohibited. In compliance with Section 13119 of the Health and Safety Code all decorations must be flame proofed.
 - d. Using tape, tacks, nails, or other fasteners to attach anything to the meeting room walls or furniture.
13. Each group using Library property is responsible for the condition of the room and must remove, after use of the facility, any equipment, materials, utensils, excess refuse, and other items belonging to the organization. Damage to Library property will be paid for by the organization booking the room.
14. Groups are responsible for setting up the meeting room for their own use and must leave the room in the same condition in which it was found, including the placement of chairs and tables.
15. Groups and organizations shall arrange for and provide their own special equipment and supply needs, including but not limited to laptop computers, cables, power cords, slide projectors, and any carts needed to transport such material. Please refer to the instructional pamphlet Berkeley Public Library Community Meeting Room Guide for guidelines and limitations on use of equipment in Library Community Meeting Rooms.
16. All publicity or flyers for the event that includes the name and/or address of the Library must clearly indicate that the event is not sponsored by the Berkeley Public Library.
17. The individual responsible for the meeting room reservation must notify the Library of meeting cancellations no less than 7 days prior to the scheduled reservation. Event scheduling changes require completion of a new application. No-shows or a failure to provide sufficient notice may result in loss of meeting room privileges.

V. REVOCATION OF PERMITS

18. Permits may be revoked by the Library whenever the use of Library facilities and equipment interferes with regular Library use, whenever regulations have been violated, and/or whenever a reallocation of authorized hours is necessary to provide equitable access by all applicants for

BERKELEY PUBLIC LIBRARY POLICIES

Rules and Regulations for use of Library Grounds, Buildings, and Equipment for Meetings and Other Events

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space. A group that has been determined to have violated the conditions of use or who has in any way disrupted Library operations in the course of using a meeting room may be suspended from being permitted to use the Library's meeting rooms for up to twelve months' time. The group will be sent a letter that will specify reason for and length of the suspension period. A group may appeal such suspension by sending an appeal letter to the Library Director within two weeks of receipt of the suspension letter. The Library will respond in writing within two weeks. Prior to hearing the appeal, the suspension will remain valid.

VI. REVIEW

19. This policy regarding the use of Library grounds, buildings, and equipment for meetings and other events will be reviewed every three years by the Board of Library Trustees.

Reviewed by:	<u>Eliot Warr</u>	<u>12/14/17</u>
	Director of Library Services	Date
Approved by:	<u>Diane Lee Dawson</u>	<u>12/6/2017</u>
	President, Board of Library Trustees	Date



CONSENT CALENDAR

June 6, 2018

To: Board of Library Trustees
From: Elliot Warren, Acting Director of Library Services
Subject: Library Community Meeting Room Use Policy & Guidelines

RECOMMENDATION

Adopt the revised Berkeley Public Library *Rules and Regulations for Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events* Policy.

INTRODUCTION

The Library's current Meeting Room Use Policy (Rules and Regulations for use of Library Grounds, Buildings, and Equipment for Meetings and Other Events) was adopted by BOLT on 12/06/2017. That update clarified many elements of the policy. However, it neither mentioned nor complemented the City of Berkeley's restrictions on use of City resources, such as meeting rooms, for purposes of political campaigning. This revision provides necessary clarity that aligns the Library's meeting room practices with state law restrictions on use of City resources for political campaigning.

FISCAL IMPACTS OF RECOMMENDATION

There is no fiscal impact from this report.

CURRENT SITUATION AND ITS EFFECTS

The current policy effectively describes the purpose of the meeting rooms, eligibility requirements, issuance of permits, and conditions of use.

At the September 2012 meeting, the rules of use were revised to formally make the meeting rooms available to the Library Foundation and Friends groups, as well as to other City of Berkeley departments and the Registrar of Voters during non-public hours; expanded use of Library facilities without requiring the presence of staff or hired security officers; and made a few other minor changes.

The February 12, 2014 revision incorporated some language relating to use of the meeting rooms by professional Library organizations and Library support groups such as the Friends and Foundation.

The December 6, 2017 revision incorporated language related to permit suspension and intellectual freedom, and clarified eligibility terms.

This revision addresses the issue of political campaigning restrictions when using the Library's meeting rooms.

BACKGROUND

The Library has five meeting rooms that are available for use by Library staff for public programs, governmental agencies, non-profit organizations, and for-profit businesses at no cost to the user. Four of the meeting rooms were built as part of the Branch Improvement Project. The Library meeting rooms may be booked for free and they provide equitable access to organizations who want to hold such things as informational talks or author events. The Library's Meeting Room Use Policy provides a framework for community members to know the conditions for use and how to obtain access to the rooms. It clarifies to

Library staff who is eligible to use the meeting rooms and under what circumstances permits to use the rooms may be issued.

The policy is designed to uphold the American Library Association's Library Bill of Rights, adopted by BOLT on 4/24/1981, and reaffirmed numerous times by BOLT since then. That document includes the statement that "Libraries which make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use."

The primary purpose of the Berkeley Public Library's facilities is to serve as a venue for fulfilling the Library's mission of meeting the cultural, recreational, informational, and educational needs of its patrons. As part of this mission, the Library offers use of its community meeting rooms to civic, cultural, educational, or governmental organization; and for library hosted events and programs. The *Rules and Regulations for Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events* was last revised and approved on December 6, 2017 at a regular meeting of the board.

California law prohibits using City resources for campaign-related purposes, including supporting or opposing the election of a candidate or passage or defeat of a ballot initiative or measure. (See California Government Code Sections 8314¹ and 54964².) "Public resources" are broadly defined by statute and case law to include any property or asset owned by the City, including, but not limited to, land, buildings, facilities, funds, equipment, supplies, telephones, computers, and vehicles, as well as the paid time of public employees. Providing use of a meeting room free of charge involves numerous City resources, including building maintenance and utility costs associated with use and maintenance of the meeting room, and City staff and/or contractor time related to keeping the building clean and open to the public.

Berkeley Public Library facilities, including its meeting rooms, are City resources and the revised policy is intended to align Library rules for use of meeting rooms in regards to political campaigning with those of other City facilities.

CONTACT PERSON

Elliot Warren, Acting Director of Library Services, 510-981-6195

Attachments:

1. Resolution
2. Existing Rules and Regulations for Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events (December 6, 2017)
3. Proposed Rules and Regulations for Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events

¹

Cal. Govt Code § 8314(a) "It is unlawful for any elected state or local officer, including any state or local appointee, employee, or consultant, to use or permit others to use public resources for a campaign activity, or personal or other purposes which are not authorized by law.

² Cal Govt. Code §54964(a) "An officer, employee, or consultant of a local agency may not expend or authorize the expenditure of any of the funds of the local agency to support or oppose the approval or rejection of a ballot measure, or the election or defeat of a candidate, by the voters."

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-____

ADOPT THE REVISED BERKELEY PUBLIC LIBRARY RULES AND REGULATIONS FOR USE OF LIBRARY GROUNDS, BUILDINGS, AND EQUIPMENT FOR MEETINGS AND OTHER EVENTS

WHEREAS, on an-as-needed basis the Board of Library Trustees reviews and revises library policies and practices to best meet the needs of the community and Library; and

WHEREAS, the policy addressing Use of Library Grounds, Buildings, and Equipment for Meetings and Other Events was approved by the Board in December 2017; and

WHEREAS, as part of its mission, the Library offers use of its community meeting rooms to civic, cultural, educational, or governmental organizations that are Berkeley-based or locally operating government agencies; and

WHEREAS, the proposed revision adds language related to restrictions on use of the Library meeting rooms for political campaign purposes;

NOW THEREFORE, BE IT RESOLVED that the Board of Library Trustees of the City of Berkeley adopts the revised Rules and Regulations for Use of Library Grounds, Buildings and Equipment for Meetings and Other Events (Attachment 3) effective June 6, 2018.

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Diane Davenport, President

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustee

**BERKELEY PUBLIC LIBRARY
POLICIES**

**SUBJECT: Rules And Regulations For Use Of Library
Grounds, Buildings, And Equipment For
Meetings And Other Events**

ORIGINAL DATE:	12/06/2017
BOLT Resolution #:	17-072
REVISED DATE:	06/06/2018
PAGE:	1 of 4

I. POLICY

The Berkeley Public Library provides community meeting rooms for the instructional, recreational, and research needs of the Library and the Berkeley community. The American Library Association's Library Bill of Rights states, "Libraries which make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use." This policy is intended to support that principle.

Groups and organizations may use meeting rooms when they are not needed for activities sponsored by the Library. Use of Library facilities by groups and organizations not affiliated with the Library or its official support organizations is restricted to the community meeting rooms and the Central Library Electronic Classroom. A group is defined as six or more people. No group may use the meeting rooms in a way that would be disruptive of Library operations. Permission to use the meeting rooms does not imply Library endorsement of the goals, policies, or activities of any group or organization. The Library reserves the right to revoke permission previously granted if deemed operationally necessary.

Rules for use of the Central Library Electronic Classroom are contained within the Electronic Classroom Use and Reservation Policy.

Information regarding the policy for use of meeting rooms will be available to the public and posted on the Library's public web site.

II. ELIGIBILITY

Permission to use the Library's meeting rooms may be granted to Berkeley-based civic, cultural, educational organizations or businesses, or to locally-operating government agencies, departments or commissions. The Director of Library Services may approve the use of meeting rooms for organizations or groups directly serving libraries, librarians and the interest of the library community but not based locally.

1. To qualify as a Berkeley based group, organization or business, the group leader or person applying for use of the classroom must submit proof of address, such as a photocopy of a utility bill or letter addressed to the individual, group or business, or submit for inspection a driver's license or state issued identification card at the time of application. Organizations not located in Berkeley must submit proof of regular operation or programs within Berkeley such as sample brochures, newsletters, or web site printouts. Informally organized groups of Berkeley residents may apply for meeting room use, as long as all other eligibility rules and conditions for use are followed.
2. Any group or organization applying for the rooms must guarantee via signature or online agreement that their organization does not discriminate in membership, or in service provision, on the basis of race, creed, color, religion, political affiliation, gender, sexual orientation, national origin, or disability, or in employment on a basis prohibited by California law

III. ISSUANCE OF PERMITS

3. Applications for use of the meeting rooms will be made available on the Library's website and at the Library, and will be approved by the Library Director or an authorized representative according to the following priorities:
 - a. Library sponsored or related meetings, programs, etc.,
 - b. Government agency sponsored programs serving the Berkeley community,
 - c. Non-profit public and/or social service organizations offering a free, open-to-the-public event (e.g. job fair, training event, educational series) and located in or operating on a regular basis in the City of Berkeley.
 - d. Berkeley-based for-profit entities offering a free, open-to-the-public event (e.g. job fair, training event, educational series).
4. The Director of Library Services or an authorized representative, e.g. the Deputy Director, Library Manager, or Branch Librarian, has authority to issue permits for the use of Library buildings, or grounds.
5. An authorized representative of the organization should submit the request at least two weeks in advance on an official application form. This policy does not guarantee the applicant the facility or the time requested. Official request forms for meeting room use may be submitted online.
6. Permits may be issued for up to three consecutive months from the date a reservation is requested. Renewal applications can be submitted at the end of the three-month period, but prior use of meeting rooms does not entitle applicants to future use. Groups should not expect to reserve in advance the same time period each month for extended periods. Meeting room use is limited to once a month. These restrictions do not apply to Library functions.

IV. CONDITIONS OF USE

7. Meeting rooms are not intended to be used for private events such as social events, parties, memorial services, or fundraisers, etc.
8. Permits are issued for specific hours and dates. When the authorized function is over, program organizers are responsible for vacating the facilities. Rooms will not be opened before the appointed time. Groups should schedule the reservation to include time for set-up and clean-up.
9. Except for events sponsored by the Library, its official support organizations, another City of Berkeley department with City staff present, or (for the purpose of hosting an official polling place) the Alameda County Registrar of Voters, the meeting rooms may only be used during the Library's open hours. Except for events sponsored by the Library and its official support organizations, the Central Library meeting room may only be used during the Library's open hours. Thirty minutes before closing the meeting room should be cleared, with all furniture replaced as required.
10. Due to fire codes, the room capacity may not be exceeded.
11. Permits for use of Library facilities for meetings shall be granted only on condition that meetings are open to the public unless they are for Library training purposes. The Library reserves the right of library staff to monitor any meetings held in its facilities (except lawful executive sessions of governmental bodies). A list of all meetings booked may be posted in a public area in the Library and on the Library's web site.

12. The following are not allowed in Library meeting rooms:

- a. Fees: No group using the community meeting rooms may charge a fee or ask for donations. The facilities will not be available for fund-raising events, except when the event or program is sponsored by the Friends of the Library or the Library Foundation, and approved in advance by the Director of Library Services. The Director of Library Services may approve the use of meeting rooms when an accredited public educational institution or professional organizations and library service affiliated groups must charge tuition for specific Library-related training courses or other associated costs directly related to the program.
- b. Sales: No items or services may be sold or advertised, except for during Library sponsored programs in which titles by a featured speaker/performer may be offered for sale by the speaker/performer or by the Friends of the Berkeley Public Library, the Berkeley Public Library Foundation or a vendor acting on behalf of either of those organizations). The speaker/performer must notify the Library when planning to offer titles for sale. In all cases, the speaker/performer or his/her representative collects payment, not library staff. Library support organizations, with the Director of Library Services approval may collect fees from the sale of books and other items in the library during scheduled events, including the sale of books in the meeting room.
- c. Campaign activity: Per California law, City resources may not be used for campaign-related purposes, *including supporting or opposing the election of a candidate or passage or defeat of a ballot initiative or measure*. Therefore, persons, groups, businesses, and organizations are prohibited from using Library's meeting rooms for any campaign-related event or activity.
- d. Smoking: Smoking or burning of items (incense, candles, etc.) is prohibited. In compliance with Section 13119 of the Health and Safety Code all decorations must be flame proofed.
- e. Using tape, tacks, nails, or other fasteners to attach anything to the meeting room walls or furniture.

13. Each group using Library property is responsible for the condition of the room and must remove, after use of the facility, any equipment, materials, utensils, excess refuse, and other items belonging to the organization. Damage to Library property will be paid for by the organization booking the room.

14. Groups are responsible for setting up the meeting room for their own use and must leave the room in the same condition in which it was found, including the placement of chairs and tables.

15. Groups and organizations shall arrange for and provide their own special equipment and supply needs, including but not limited to laptop computers, cables, power cords, slide projectors, and any carts needed to transport such material. Please refer to the instructional pamphlet Berkeley Public Library Community Meeting Room Guide for guidelines and limitations on use of equipment in Library Community Meeting Rooms.

16. All publicity or flyers for the event that includes the name and/or address of the Library must clearly indicate that the event is not sponsored by the Berkeley Public Library.

17. The individual responsible for the meeting room reservation must notify the Library of meeting cancellations no less than 7 days prior to the scheduled reservation. Event scheduling changes require completion of a new application. No-shows or a failure to provide sufficient notice may result in loss of meeting room privileges.

V. REVOCATION OF PERMITS

18. Permits may be revoked by the Library whenever the use of Library facilities and equipment interferes with regular Library use, whenever regulations have been violated, and/or whenever a reallocation of authorized hours is necessary to provide equitable access by all applicants for space. A group that has been determined to have violated the conditions of use or who has in any way disrupted Library operations in the course of using a meeting room may be suspended from being permitted to use the Library's meeting rooms for up to twelve months' time. The group will be sent a letter that will specify reason for and length of the suspension period. A group may appeal such suspension by sending an appeal letter to the Library Director within two weeks of receipt of the suspension letter. The Library will respond in writing within two weeks. Prior to hearing the appeal, the suspension will remain valid.

VI. REVIEW

19. This policy regarding the use of Library grounds, buildings, and equipment for meetings and other events will be reviewed every three years by the Board of Library Trustees.

Reviewed by:	_____	Date	_____
	Director of Library Services		
Approved by:	_____	Date	_____
	Chair, Board of Library Trustees		



CONSENT CALENDAR

June 6, 2018

To: Board of Library Trustees (BOLT)
From: Alicia Abramson, Manager, Library Information Technology
Subject: RFP: Public PC Time and Print Management System

RECOMMENDATION

Adopt the resolution to authorize the Library to issue a Request for Proposals for a new Public PC Time and Print Management System.

FISCAL IMPACT

Estimated costs related to the purchase and installation of a PC Time and Print Management System are \$130,000 over a three year contract period. This includes the initial software and hardware purchase, installation services, annual software license fees, and annual system maintenance fees. This project is funded in the FY 2019 budget and to be charged to 301-9102-450.30-47 (Maintenance Services: Software Maintenance).

BACKGROUND

The Berkeley Public Library currently provides 132 public access computers, including laptops and desktop PCs, for use by Library patrons. These computers are configured with multiple software packages including the Microsoft Office suite of programs including Microsoft Word and Excel, web browsers such as Chrome and Firefox, image editing software, DVD playback software, and several other applications.

Each Library patron can use a public access computer for up to two hours a day, seven days a week. To manage the Library's public access computers, the Library maintains a Public PC Time Management System (the "System") which allows the Library to set time limits for users to ensure fair access to all patrons by balancing computer availability with user demand. The System is primarily self-service but staff are also able to assist patrons as needed.

The current System provides users with the ability to make computer reservations in advance through a web interface, an Interactive Voice Response System, and by walking up and logging in to currently unreserved computers. When making reservations, the System automatically presents users with available times on the selected day, and users can also select specific computers if they like. Computer sessions end either by user initiation or by the System when the user's maximum time limit has been reached. The System has configurable alerts which notify users when they are nearing the end of their time limit so that they can save their work before the System logs them off.

The System also provides a staff interface which allows staff to assist patrons with making or canceling computer reservations, to provide temporary computer passes to walk-in users who do not have Library cards, and to remotely restart unresponsive computers.

The current Public PC Time Management System is 15 years old and has reached its "end of life", meaning that the vendor is no longer supporting the product, and no new improvements or bug fixes are in development. Because the Public PC Time Management System is essential to the management of the Library's public access computer service, the Library must identify and implement a replacement System. This gives the Library the opportunity to acquire a current generation system with all of the above features

as well as a more modern and patron-friendly user interface that is easier for patrons to use and for Library IT staff to support.

In addition, as part of the replacement of the current System, the Library wishes to include an integrated print-management component that will simplify the process of printing from Library computers and that provides a credit/debit card payment option. The current system does not have an integrated solution and requires two separate third-party software applications to enable users to print. This solution is cumbersome for users and frequently requires staff intervention to release print jobs. Patrons are also frustrated by the absence of a credit/debit card payment option. Integration of a printing solution into the system will enable the Library to enhance users' overall experience with public access computers.

CURRENT SITUATION AND ITS EFFECTS

The RFP process is an open process to solicit proposed solutions from the marketplace. Responses are evaluated to determine whether a vendor is able to provide the Library with the required services at the best price. Conducting an RFP for a Public PC Time and Print Management System gives the Library an opportunity to survey the current market for current generation systems, obtain competitive quotes from qualified bidders and to select a customized solution that best meets the requirements for the management of the Library's public access computers.

The Library anticipates releasing an RFP for a Public PC Time and Print Management System in July 2018 following Board approval in June 2018, and awarding a contract in the fall of 2018.

ALTERNATIVE ACTIONS

None.

FUTURE ACTION

Contracts exceeding the Director's authorized threshold will be returned to the Board for final approval.

CONTACT PERSON

Elliot Warren, Acting Director of Library Services, 510-981-6195

Attachments:

1. Resolution

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-____

RECOMMENDATION TO BOARD OF LIBRARY TRUSTEES TO AUTHORIZE REQUEST FOR PROPOSAL FOR CENTRAL LIBRARY DATA ROOM INFRASTRUCTURE UPGRADES

WHEREAS, the Berkeley Public Library operates a PC Time Management System that is essential to managing the Library's 132 public access computers; and

WHEREAS, the current PC Time Management System is no longer supported by the vendor; and

WHEREAS, to improve user experience when using public access computers, the Library seeks to implement a current generation PC Time Management System that includes an integrated Print Management component; and

WHEREAS, City of Berkeley administrative regulations require purchases to be made through a competitive process; and

WHEREAS, there is adequate competition among vendors offering PC Time and Print Management solutions; and

WHEREAS, Berkeley Public Library has not previously issued a Request for Proposal for PC Time and Print Management solutions.

NOW THEREFORE, BE IT RESOLVED that the Board of Library Trustees of the City of Berkeley authorizes the Director of Library Services to issue a Request for Proposal for a Public PC Time and Print Management System.

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Diane Davenport, Chairperson

Elliot Warren, Acting Director of Library Services
Serving as Secretary of the Board of Library Trustees



ACTION CALENDAR

June 6, 2018

To: Board of Library Trustees

From: Dennis Dang, Administrative and Fiscal Services Manager

Subject: Recommendation to City Council on FY 2019 Library Tax Rate

RECOMMENDATION

Adopt a resolution to recommend that the Berkeley City Council set the FY 2019 tax rate for the Library Services Tax at \$0.2185 (21.85 cents) per square foot for dwelling units and \$0.3303 (33.03 cents) per square foot for industrial, commercial, and institutional buildings, based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67%.

FISCAL IMPACTS OF RECOMMENDATION

The total revenue generated by the Library Tax in FY19 is expected to be approximately \$19,746,463 (*net of Alameda County billing and collection fees*). It is estimated that the tax will cost residential taxpayers no more than the following average amounts during Fiscal Year 2019:

Size in Square Feet	Annual Tax for Dwellings	
	FY 2019	FY 2018
1,200	\$262.16	\$252.88
1,500	\$327.70	\$316.10
1,900	\$415.08	\$400.39
3,000	\$655.39	\$632.19
3,900	\$852.01	\$821.85
10,000	\$2184.64	\$2107.30

It is estimated that the cost of the tax for a 1,500 square foot commercial establishment will increase to \$495.43 in FY19 from \$477.89 in FY18.

BACKGROUND

The Central Library and neighborhood branch libraries will have received approximately 98% of 2018 fiscal year funding through a citywide special tax (referred to as the Library Relief Act of 1980) of \$0.2107 per square foot on all improvements to residential real property in the City of Berkeley, and \$0.3186 per square foot on all improvements to industrial, commercial, and institutional real property. The purpose of this voter-approved tax is to provide a stable revenue source to ensure the provision of library services at the level which permits library operations six days a week at branch libraries, seven days a week at the Central Library, and which permits the purchase of library materials at levels which are commensurate with the libraries' hours of service, staffing, and patron needs.

CURRENT SITUATION

For the current fiscal year, Berkeley's Library Tax will raise around \$19.0 million. The tax is indexed to either the Consumer Price Index in the immediate San Francisco Bay Area or the per capita Personal Income Growth factor in California.

The Director of Library Services recommends that the Board of Library Trustees recommend that the City Council adjust the tax rate by the 3.67% increase in the Fiscal Year 2018-19 per capita Personal Income Growth factor in California which is greater than the 3.217% increase in the April 2018 Consumer Price Index in the immediate San Francisco Bay Area. This recommended action will result in a rate increase from \$0.2107 in FY18 to \$0.2185 in FY19 on residential property and from \$0.3186 in FY18 to \$0.3303 in FY19 on industrial, commercial, and institutional property.

ALTERNATIVE ACTIONS

The alternative action of adopting the Consumer Price Index in the immediate San Francisco Bay Area of 3.217% would be a reduction of \$86,264 in projected FY 2019 library tax receipts. This is not recommended due to increased cost factors for personnel, materials, programs, and infrastructure maintenance in the FY 2019 Library budget. Or from another perspective, adoption of the Fiscal Year 2018-19 per capita Personal Income Growth factor in California would result in an increase to the Library Tax Fund of approximately \$603,884 over currently projected FY 2018 receipts.

FUTURE ACTION

The Board's recommendation will be forwarded to the City's Director of Finance for inclusion as a submittal to the City Council for action.

CONTACT PERSON

Dennis Dang, Administrative and Fiscal Services Manager, 510-981-6118

Attachments:

1. Resolution

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-____

RECOMMEND THAT THE BERKELEY CITY COUNCIL SET THE FY 2019 TAX RATE FOR THE LIBRARY SERVICES TAX AT \$0.2185 (21.85 CENTS) PER SQUARE FOOT FOR DWELLING UNITS AND \$0.3303 (33.03 CENTS) PER SQUARE FOOT FOR INDUSTRIAL, COMMERCIAL, AND INSTITUTIONAL BUILDINGS, BASED ON THE FISCAL YEAR 2018-19 PER CAPITA PERSONAL INCOME GROWTH FACTOR IN CALIFORNIA OF 3.67%

WHEREAS, each year the City Council adopts an ordinance to establish the rate for the Library Services Tax, which supports the Library's operations; and

WHEREAS, the increase is based on either the per capita Personal Income Growth factor in California or the Consumer Price Index in the immediate San Francisco Bay Area; and

WHEREAS, the Board of Library Trustees makes a recommendation to the City Council each year on the adoption of a tax rate for Library Services, with a potential increase in the Library Services Tax rate based on either the per capita Personal Income Growth factor in California or the Consumer Price Index in the immediate San Francisco Bay Area; and

WHEREAS, the Fiscal Year 2018-19 per capita Personal Income Growth factor for California is 3.67% and the April 2018 Consumer Price Index in the immediate San Francisco Bay Area is 3.217%.

NOW, THEREFORE, BE IT RESOLVED by the Board of Library Trustees of the City of Berkeley to recommend that the Berkeley City Council set the FY 2019 tax rate for the Library Services Tax at \$0.2185 (21.85 cents) per square foot for dwelling units and \$0.3303 (33.03 cents) per square foot for industrial, commercial, and institutional buildings, based on the Fiscal Year 2018-19 per capita Personal Income Growth factor for California of 3.67%.

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Diane Davenport, President

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustee



CONSENT CALENDAR

June 6, 2018

TO: Board of Library Trustees

FROM: Dennis Dang, Administrative and Fiscal Services Manager

SUBJECT: Revision to Biennial Budget FY 2019 and FY 2020 – Library Tax Fund (301)

RECOMMENDATION

Adopt a resolution revising the adopted Library Tax Fund (301) biennial budget for fiscal years 2019 and 2020 to incorporate projected revenue based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67%.

FISCAL IMPACTS OF RECOMMENDATION

Adjusting projected library tax receipts in the Library Tax Fund (301) revenue budget to reflect the increase in the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67% will result in an additional \$318,092 over the adopted FY 2019 revenue. The total revenue generated by the library tax in FY19 is expected to be approximately \$19,746,463 (*net of Alameda County billing and collection fees*).

The Library is not requesting any change to the adopted expenditures appropriation budgets.

Revenue

Fund	FY 2019			FY 2020		
	P.I.G for CA	R18-018 (April 4, 2018)	Variance f/(u)	P.I.G for CA	R18-018 (April 4, 2018)	Variance f/(u)
Library Tax Fund (301)	\$19,893,213*	\$19,575,121	\$318,092	\$20,375,643^	\$20,051,938	\$323,705

* Estimated library tax receipt during FY 2019 is \$19,746,463.

^ Estimated library tax receipt during FY 2020 is \$20,141,393.

BACKGROUND

The City of Berkeley imposes a citywide special tax (referred to as the Library Relief Act of 1980) on all residential and commercial property in Berkeley based on square footage. This voter-approved tax is intended to provide a stable revenue source to assure the provision of library services and may be adjusted annually based on the recommendation of the Director of Library Services to the Board of Library Trustees that the City Council adjust the tax rates (residential and commercial) by either the per capita Personal Income Growth factor in California or the Consumer Price Index in the immediate San Francisco Bay Area.

For fiscal year 2018, the library tax will have raised around \$19.0 million representing 98% of the Library's total fiscal year funding.

CURRENT SITUATION AND ITS EFFECTS

Adoption of BOLT Resolution No.: R18-018 on April 4, 2018 approving the fiscal years 2019 and 2020 biennial budgets included a provision for revision pending release of the Fiscal Year 2018-19 per capita Personal Income Growth factor in California and the April 2018 Consumer Price Index in the immediate San Francisco Bay Area. At that time, neither of the economic indices had been available and the estimated FY 2019 library tax receipt at \$19,428,371 was derived from the base budget. Consequently, the board stipulated in Resolution No.: R18-018 its intent to reconsider budget adjustments following release of both indices.

On April 30, 2018, the California Department of Finance released the Fiscal Year 2018-19 per capita Personal Income Growth factor in California at 3.67%. On May 10, 2018, the United States Bureau of Labor Statistics released the April 2018 Consumer Price Index in the immediate San Francisco Bay Area at 3.217%. Upon review of both indices the (acting) Director of Library Services has judged it prudent to present before the board an adjustment to the Library Tax Fund (301) biennial budget incorporating the 3.67% increase to the Fiscal Year 2018-19 per capita Personal Income Growth factor in California. The per capita Personal Income Growth factor in California exceeds the Consumer Price Index in the immediate San Francisco Bay Area rate by 45.3 basis points; and so, selection of the more favorable per capita Personal Income Growth factor in California would result in an incremental revenue increase of \$86,284 over that of the Consumer Price Index in the immediate San Francisco Bay Area.

ALTERNATIVE ACTION

Leave the fiscal years 2019 and 2020 biennial budget as adopted by BOLT Resolution: R18-018 on April 4, 2018; thus reducing FY 2019 library tax revenues by \$318,092 from that projected by adoption of the Fiscal Year 2018-19 per capita Personal Income Growth factor in California at 3.67%.

Attachments

1. Resolution
2. Library Tax Fund 5-Year Analysis
3. Other Funds 5-Year Analysis (*is unchanged from prior presentation*)
4. BPL Friends & Gifts Fund 5-Year Analysis (*is unchanged from prior presentation*)
5. Foundation Fund 5-Year Analysis (*is unchanged from prior presentation*)

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-____

REVISE THE LIBRARY TAX FUND BIENNIAL BUDGET FOR REVENUE FOR FY 2019 TO \$19,893,213 AND FOR FY 2020 TO \$20,375,643, WITH NO OTHER CHANGES TO THE ADOPTED BIENNIAL BUDGET

WHEREAS, on April 4, 2018 , the Board of Library Trustees by Resolution No.: R18-018 approved the fiscal years 2019 and 2020 biennial budgets with a provision for revision pending release of the Fiscal Year 2018-19 per capita Personal Income Growth factor in California and the April 2018 Consumer Price Index in the immediate San Francisco Bay Area; and

WHEREAS, on April 30, 2018, the California Department of Finance released the Fiscal Year 2018-19 per capita Personal Income Growth factor in California at 3.67%; and

WHEREAS, on May 10, 2018, the United States Bureau of Labor Statistics released the April 2018 Consumer Price Index in the immediate San Francisco Bay Area at 3.217%; and

WHEREAS, the (acting) Director of Library Services judges it prudent that the Berkley Public Library Biennial Budget for fiscal years 2019 and 2020 incorporate revised revenue projections prior to budget adoption by the City Council; and

WHEREAS, based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California the FY 2019 library tax revenue would increase incrementally \$318,092; and

NOW THEREFORE, BE IT RESOLVED that the Board of Library Trustees of the City of Berkeley hereby adopts the resolution revising the adopted Library Tax Fund (301) biennial budget for fiscal years 2019 and 2020 to incorporate projected revenue based on the Fiscal Year 2018-19 per capita Personal Income Growth factor in California of 3.67% with no other changes to the biennial budget as presented.

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Diane Davenport, President

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustees

LIBRARY TAX FUND 5-YEAR ANALYSIS

	FY 2017 FINAL	FY 2018 ADOPTED	FY 2018 REVISED	FY 2018 PROJECTED	FY 2019 PROJECTED	FY 2020 PROJECTED	FY 2021 PROJECTED
Beginning Fund Balance	\$ 5,787,401	\$ 6,836,082	\$ 6,836,082	\$ 6,836,082	\$ 7,992,549	\$ 5,150,664	\$ 6,821,565
Revenues							
Library Services Tax	\$ 18,077,484	\$ 18,786,687	\$ 18,786,687	\$ 19,142,579	\$ 19,746,463	\$ 20,141,393	\$ 20,544,220
Fines/Fees	200,135	202,250	202,250	202,250	114,750	202,250	202,250
Donations/Private Contributions							
Misc. Revenue / Interest / Refunds	13,864	32,000	32,000	32,000	32,000	32,000	32,000
TOTAL REVENUE	\$ 18,291,483	\$ 19,020,937	\$ 19,020,937	\$ 19,376,829	\$ 19,893,213	\$ 20,375,643	\$ 20,778,470
Expenditures							
Operations							
Salaries, Wages, Benefits	\$ 13,616,344	\$ 15,051,521	\$ 15,051,521	\$ 15,051,521	\$ 15,030,295	\$ 15,481,204	\$ 15,945,640
Salaries, Wages, Benefits							
less: Labor Vacancy Savings		300,000	300,000	1,185,091	300,000	309,624	318,913
Personnel	\$ 13,616,344	\$ 14,751,521	\$ 14,751,521	\$ 13,866,430	\$ 14,730,295	\$ 15,171,580	\$ 15,626,727
Non-Personnel	709,809	888,734	927,516	927,516	1,058,786	575,000	575,000
Library Materials (incl Tool Lndng)	1,331,106	1,345,409	1,545,409	1,545,409	1,780,000	1,400,000	1,400,000
Misc. Professional Services	311,263	791,450	922,683	422,683	737,450		
Utilities+Telephone	434,283	495,902	526,807	526,807	495,902	500,000	500,000
Janitorial	222,763	205,000	206,910	206,910	205,000	225,000	225,000
Software Maintenance	244,660	346,000	357,251	357,251	346,000	350,000	350,000
Computer & Software Purchase	181,079	35,000	168,072	168,072	249,624	50,000	50,000
Building/Infrastructure	162,783	1,300,000	1,222,948	222,948	3,100,000	400,000	400,000
Subtotal:	\$ 17,214,090	\$ 20,159,016	\$ 20,629,117	\$ 18,244,026	\$ 22,703,057	\$ 18,671,580	\$ 19,126,727
Charges From Other Depts							
Finance - Billing (3601)	\$ 17,347	\$ 18,217	\$ 18,217	\$ 18,217	\$ 17,937	\$ 18,475	\$ 19,029
Facilities - Admn (5401) +Txcs (5403)	11,365	14,402	14,402	14,402	14,104	14,687	15,008
Interfund Transfers							
Subtotal:	\$ 28,712	\$ 32,619	\$ 32,619	\$ 32,619	\$ 32,041	\$ 33,162	\$ 34,037
TOTAL EXPENDITURES	\$ 17,242,802	\$ 20,191,635	\$ 20,661,736	\$ 18,276,645	\$ 22,735,098	\$ 18,704,742	\$ 19,160,764
Projected Surplus/(Shortfall)							
{Rev - Exp}	\$ 1,048,681	\$ (1,170,698)	\$ (1,640,799)	\$ 1,100,184	\$ (2,841,885)	\$ 1,670,900	\$ 1,617,706
GROSS FUND BALANCE							
{Bal + Rev - Exp}	\$ 6,836,082	\$ 5,665,384	\$ 5,195,283	\$ 7,936,266	\$ 5,150,664	\$ 6,821,565	\$ 8,439,271
ADD:closure 305; transfer to 301				\$ 56,283			
Revised Gross Fund Balance {Gross Fund Balance and Other Adjustments}	\$ 6,836,082	\$ 5,665,384	\$ 5,195,283	\$ 7,992,549	\$ 5,150,664	\$ 6,821,565	\$ 8,439,271
Annual Committed Reserve	\$ 1,400,000	\$ 1,500,000	\$ 1,500,000	\$ 1,500,000	1,500,000	1,500,000	1,500,000
Uncommitted Fund Balance	\$ 5,436,082	\$ 4,165,384	\$ 3,695,283	\$ 6,492,549	\$ 3,650,664	\$ 5,321,565	\$ 6,939,271
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OTHER FUNDS 5-YEAR ANALYSIS

	FY 2017 FINAL	FY 2018 ADOPTED	FY 2018 REVISED	FY 2018 PROJECTED	FY 2019 PROJECTED	FY 2020 PROJECTED	FY 2021 PROJECTED
Beginning Fund Balance	\$ 214,010	\$ 196,713	\$ 196,713	\$ 196,713	\$ 120,480	\$ 100,530	\$ 84,030
Transaction Based Rmb Fund (302)	124,720	106,601	106,601	106,601	90,101	73,601	57,101
Grants Fund (304)	33,008	33,830	33,830	33,830	30,380	26,930	26,930
Public Library Fund (305)	56,283	56,283	56,283	56,283			
Revenues							
Direct Loan Fund							
Literacy Services & LSTA	61,534	60,000	60,000	60,000	60,000	50,000	50,000
Miscellaneous Grant Revenue	12,000						
Public Library Fund (SB 358)							
Other	22,042	1,500	1,500	1,500	1,500	1,500	1,500
TOTAL REVENUE	\$ 95,576	\$ 61,500	\$ 61,500	\$ 61,500	\$ 61,500	\$ 51,500	\$ 51,500
Expenditures							
Operations							
Personnel	\$ 48,231	\$ 33,000	\$ 33,000	\$ 33,000	\$ 33,000	\$ 35,000	\$ 35,000
Non-Personnel	64,642	48,450	48,450	48,450	48,450	33,000	33,000
Library Materials							
TOTAL EXPENDITURES	\$ 112,873	\$ 81,450	\$ 81,450	\$ 81,450	\$ 81,450	\$ 68,000	\$ 68,000
Projected Surplus/Shortfall (Rev - Exp)	\$ (17,297)	\$ (19,950)	\$ (19,950)	\$ (19,950)	\$ (19,950)	\$ (16,500)	\$ (16,500)
GROSS FUND BALANCE (Bal + Rev - Exp)	\$ 196,713	\$ 176,763	\$ 176,763	\$ 176,763	\$ 100,530	\$ 84,030	\$ 67,530
LESS:closure 305; transfer to 301				\$ (56,283)			
Revised Gross Fund Balance {Gross Fund Balance and Other Adjustments}	\$ 196,713	\$ 176,763	\$ 176,763	\$ 120,480	\$ 100,530	\$ 84,030	\$ 67,530

BPL FRIENDS & GIFTS FUND 5-YEAR ANALYSIS

	FY 2017 FINAL	FY 2018 ADOPTED	FY 2018 REVISED	FY 2018 PROJECTED	FY 2019 PROJECTED	FY 2020 PROJECTED	FY 2021 PROJECTED
Beginning Fund Balance	\$ 331,170	\$ 353,342	\$ 353,342	\$ 353,342	\$ 293,309	\$ 243,309	\$ 243,309
Revenues							
Friends of BPL	\$ 108,639	\$ 90,000	\$ 90,000	\$ 90,000	\$ 100,000		
Donations/Private							
Interest/Misc. Revenues	2,780						
TOTAL REVENUE	\$ 111,419	\$ 90,000	\$ 90,000	\$ 90,000	\$ 100,000	\$ -	\$ -
Expenditures							
Operations							
Personnel							
Non-Personnel	38,151	150,000	120,000	120,033	150,000		
Professional Services	51,096		30,000	30,000			
Library Materials							
Subtotal:	\$ 89,247	\$ 150,000	\$ 150,000	\$ 150,033	\$ 150,000	\$ -	\$ -
TOTAL EXPENDITURES	\$ 89,247	\$ 150,000	\$ 150,000	\$ 150,033	\$ 150,000	\$ -	\$ -
Projected Surplus / (Deficit) (Rev - Exp)	\$ 22,172	\$ (60,000)	\$ (60,000)	\$ (60,033)	\$ (50,000)	\$ -	\$ -
GROSS FUND BALANCE (Bal + Rev - Exp)	\$ 353,342	\$ 293,342	\$ 293,342	\$ 293,309	\$ 243,309	\$ 243,309	\$ 243,309

FOUNDATION FUND 5-YEAR ANALYSIS

	FY 2017 FINAL	FY 2018 ADOPTED	FY 2018 REVISED	FY 2018 PROJECTED	FY 2019 PROJECTED	FY 2020 PROJECTED	FY 2021 PROJECTED
Beginning Fund Balance	\$ 1,027,538	\$ 1,016,771	\$ 1,016,771	\$ 1,016,771	\$ 527,511	\$ 127,511	\$ 127,511
Revenues							
Foundation	\$ 27,100	\$ 211,000	\$ 211,000	\$ 211,000			
Misc./ Interest							
TOTAL REVENUE	\$ 27,100	\$ 211,000	\$ 211,000	\$ 211,000	\$ -	\$ -	\$ -
Expenditures							
Personnel	\$ 320			\$ 733			
Consultants	7,405						
Furniture and Fixtures	457						
Equipment							
Building		500,000	500,000	25,000			
Miscellaneous/Other	29,685	100,000	100,000	100,000	400,000		
TOTAL EXPENDITURES	\$ 37,867	\$ 600,000	\$ 600,000	\$ 125,733	\$ 400,000	\$ -	\$ -
Projected Surplus/Shortfall (Rev - Exp)	\$ (10,767)	\$ (389,000)	\$ (389,000)	\$ 85,267	\$ (400,000)	\$ -	\$ -
GROSS FUND BALANCE (Bal + Rev - Exp)	\$ 1,016,771	\$ 627,771	\$ 627,771	\$ 1,102,038	\$ 127,511	\$ 127,511	\$ 127,511
Other (suspension of Pace Trust)		\$ (574,527)	\$ (574,527)	\$ (574,527)			
Revised Gross Fund Balance {Gross Fund Balance and Other Adjustments}	\$ 1,016,771	\$ 53,244	\$ 53,244	\$ 527,511	\$ 127,511	\$ 127,511	\$ 127,511



ACTION CALENDAR

June 6, 2018

TO: Board of Library Trustees

FROM: Jay Dickinson, Circulation Services Manager

SUBJECT: Circulation Policies Update

RECOMMENDATION

Adopt the resolution approving update and simplification of the Library fee schedule. The new schedule expands fine free practices at Berkeley Public Library to include all items except for tools, laptops, Cornerstone Kits, and Link+ materials. Furthermore, fines for late return of tools will be simplified into three categories. The proposal also includes removal of the \$10 Processing Fee that is charged when people lose materials and the \$5 Maximum Late Fee that is applied when an item goes to “Billed” status after 42 days of being overdue. Patrons will continue to be billed the replacement cost of items that they do not return.

FISCAL IMPACT

In Fiscal year 2019, the Library foresees an approximately \$100,000 reduction in revenue due to removal of late fees. Elimination of some late fees is proposed, but long overdue items will continued to be billed to patrons, as will late fees on tools, laptops, Cornerstone kits, and Link+ materials. Fines for tools (about \$7,500 received annually) may see a slight reduction due to proposed changes in the fines schedule for tools.

BACKGROUND

Berkeley Public Library has historically charged fines and fees for the late return of materials, lost materials, photocopies, etc. Periodically, these charges are reviewed and may be raised, reduced, or discontinued; all changes are brought as agenda items to the Board of Library Trustees for consideration and approval.

Many years ago, the Library decided to remove barriers to access for children by removing late fees for children’s materials. Since then, no late fees have been applied to children’s materials returned past due dates. The following resolution would make Library practices more consistent, equitable, and easy to understand for Library patrons. Our goal is to make the Library services user-friendly for all community members.

Processing Fees and Maximum Late Fees create significant barriers for patrons and Library staff report that they currently often waive such fees because they are prohibitively expensive. However, waiving such fees on a case-by-case basis can create perceptions of favoritism, prejudice, and/or inequity as well. This proposal is designed to ensure consistent practices.

CURRENT SITUATION AND ITS EFFECTS

Berkeley Public Library continually reviews its policies, including circulation policies, in an effort to improve services. The American Library Association's Code of Ethics, which the BOLT affirmed commitment to at the April 19, 2017 Board of Library Trustees meeting, is one of the guiding principles in policy review. The Code of Ethics states "We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests." Berkeley Public Library is committed to this standard, and the annual review of the fines and fees schedule has prompted a reconsideration of the "late fee" model currently in use.

25,929 cardholders at Berkeley Public Library are currently blocked from checking items out because they have accrued fines of \$10 or more. 6,036 have accrued fines in excess of \$100. These numbers fluctuate daily, but this snapshot can be taken as a reliable median over the course of time.

Libraries institute late fees for two primary reasons: to raise revenue and/or to incentivize patrons to return materials on time.

Revenue

Over the course of time, monies taken in as payment of fines and fees have represented less and less of the Library's overall income. In 2010 late fees accounted for 1.8% of overall revenue. That percentage has decreased steadily since then, and in 2017 late fees accounted for no more than .9% of all revenue. In anticipation of this proposal, the 2017/18 budget was written with significant reduction of revenue from late fees. The impact of this minor reduction of revenue is expected to have no negative operational ramifications.

Incentivizing patrons to return materials on time

This proposal would not entirely eliminate fees associated with the late or non-return of materials. Patrons will no longer be charged a *daily* fine for late return. However, any materials not returned within 6 weeks of the due date will automatically be billed to the patron at the publisher designated purchase price of the item when purchased by the Library. The resulting bill will block use of the account when it exceeds \$10 (the vast majority of the time). Materials need to be returned or the bill paid for account use to resume. This acts as an incentive for patrons to return materials on time, and mirrors the practice already in place with the Library's Children's Collection. The absence of late fees has been shown to have no detrimental effect to the availability of Children's materials, and has ensured a high degree of access to the collection because continued use of one's account is dependent solely on the return of books, and not the exchange of money for those items returned past their due date.

As further incentive, the Library will continue to employ the use of a Collection Agency (Unique Management) for accounts with billed items at an amount that exceeds \$50.00.

There are currently six different fine levels for tools (\$1, \$2, \$5, \$6, \$10, \$15, \$18 per day). The proposal will create three levels: \$1, \$5, and \$15 per day. This will serve to simplify communications with the public, and will have no expected affect upon timely return of tools to the Library.

It is important to note that the Library is committed to facilitating access to materials sought by patrons, including newly published titles. As approved by BOLT, the Library has expanded its materials budget significantly for the 2019 year. This will allow a number of things, including expanded purchases of popular titles, expansion of the Lucky Day collections, and expanded participation of Library staff in the selection process to ensure that the right materials are available for community members. We do not anticipate that materials kept longer than prescribed due dates will significantly reduce access to popular materials as a result of these budgetary changes.

For people of lower income, the Library is often the only means by which to access quality print materials inexpensively. The presence of late fees currently serves as a disincentive for Library use, as it is common for busy community members to return a handful of books a week late, which can result in complete blocking of access to reading materials for such individuals. For a person of financial means, such fees are relatively easy to pay, while for a person living on limited income, they are often prohibitively expensive. The proposed policy enables more equitable service delivery.

Increasingly, public libraries throughout the country are recognizing that the use of late fees creates barriers for lower income residents. Many Libraries are reducing or eliminating fines as a result. Public libraries in Ohio, Colorado, Illinois, Massachusetts, California, and many other states have made the change. Most recently, San Diego Public Library (SDPL) proposed eliminating fines, resulting in a radically different structure for circulation and fees. SDPL determined that it cost \$1,000,000 in staff time to collect \$700,000 in fees each year. We have not done a similar study, but the amount of time it takes to collect, count, and account for fairly small amounts of money is something the Library has long been aware of.

Berkeley Public Library strives to remove barriers to access and improve the patron experience however it can. This important policy change will benefit the most disadvantaged members of our community, as well as promote the use of the Library's collections. It will eliminate some of the most challenging interactions between staff and patrons, and will have minimal effect on revenue.

FUTURE ACTION

None

Attachments

1. Resolution
2. Code of Ethics of the American Library Association
3. Current Fee Schedule approved 11/01/2017
4. Proposed Fee Schedule
5. Existing Tool Lending Library Brochure
6. Proposed Tool Lending Library Fines
7. Doing Fine(s)? Article from Library Journal
8. Nashville, Salt Lake City, Columbus Go Fine-Free Article from Library Journal

BOARD OF LIBRARY TRUSTEES

RESOLUTION NO: R18-___

CIRCULATION POLICIES UPDATE

WHEREAS, the Berkeley Public Library has historically charged fines and fees for the late return of adult materials, lost materials, photocopies, etc.; and

WHEREAS, periodically these are brought before the Board of Library Trustees for review and may be raised, reduced, or discontinued; and

WHEREAS, the American Library Association's Code of Ethics commits to providing "the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests."; and

WHEREAS, Berkeley Public Library has been a leader in policies and practices designed to enable equitable access for all residents through such things as not charging late fees for children's materials; and

WHEREAS, the practice of not charging late fees for children's materials has not resulted in lack of access, but has, in fact, successfully increased access to reading materials for community members; and

WHEREAS, the new schedule expands fine free practices at Berkeley Public Library to include all items except for tools, laptops, Cornerstone Kits, and Link+ materials; and

WHEREAS, fines for late return of tools will be simplified into three categories; and

WHEREAS, the \$10 Processing Fee that is charged when people lose materials and the \$5 Maximum Late Fee that is applied when an item goes to "Billed" status after 42 days of being overdue will be removed from the Fees Schedule; and

WHEREAS patrons will continue to be billed the replacement cost of items that they do not return; and

WHEREAS Berkeley Public Library strives to remove barriers to access and improve the patron experience of Library Services.

NOW, THEREFORE, BE IT RESOLVED by the Board of Library Trustees of the City of Berkeley to approve the Library Fee Schedule for Fiscal Year 2019, to take effect July 1, 2018

ADOPTED by the Board of Library Trustees of the City of Berkeley at a regular meeting held on June 6, 2018 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Dianne Davenport, Chairperson

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustees



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FROM: Jay Dickinson, Circulation Services Manager

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FUTURE ACTION

None

Attachments

1. Resolution
2. Code of Ethics of the American Library Association
3. Current Fee Schedule approved 11/01/2017
4. Proposed Fee Schedule
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6. Proposed Tool Lending Library Fines
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AYES:

NOES:

ABSENT:

ABSTENTIONS:

Dianne Davenport, Chairperson

Elliot Warren, Acting Director of Library Services
Serving as Secretary to the Board of Library Trustees

Code of Ethics of the American Library Association

As members of the American Library Association, we recognize the importance of codifying and making known to the profession and to the general public the ethical principles that guide the work of librarians, other professionals providing information services, library trustees and library staffs.

Ethical dilemmas occur when values are in conflict. The American Library Association Code of Ethics states the values to which we are committed, and embodies the ethical responsibilities of the profession in this changing information environment.

We significantly influence or control the selection, organization, preservation, and dissemination of information. In a political system grounded in an informed citizenry, we are members of a profession explicitly committed to intellectual freedom and the freedom of access to information. We have a special obligation to ensure the free flow of information and ideas to present and future generations.

The principles of this Code are expressed in broad statements to guide ethical decision making. These statements provide a framework; they cannot and do not dictate conduct to cover particular situations.

- I. We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.
- II. We uphold the principles of intellectual freedom and resist all efforts to censor library resources.
- III. We protect each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted.
- IV. We respect intellectual property rights and advocate balance between the interests of information users and rights holders.
- V. We treat co-workers and other colleagues with respect, fairness, and good faith, and advocate conditions of employment that safeguard the rights and welfare of all employees of our institutions.
- VI. We do not advance private interests at the expense of library users, colleagues, or our employing institutions.
- VII. We distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.
- VIII. We strive for excellence in the profession by maintaining and enhancing our own knowledge and skills, by encouraging the professional development of coworkers, and by fostering the aspirations of potential members of the profession.

Adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008.

The previous version of this file has long held the **incorrect amendment date of June 28, 1997**; the [Office for Intellectual Freedom](#) regrets and apologizes for the error.

BERKELEY PUBLIC LIBRARY POLICIES

SUBJECT: Circulation Policies (Loan limits, fees and fines)

ORIGINAL DATE:
BOLT Resolution #: R17-063
REVISED DATE: 11/01/2017
PAGE: 1 of 2

All patron types are allowed a maximum of 75 items overall and up to 4 Lucky Day items, except for Shelter and Temporary Patron cards, which are limited to 3 and 1 respectively.

Materials	Fines Per Day	Loan Period in Days	Renewals
Book	\$0.25	21	2 renewals
Book on CD/Cassette/MP3	\$0.25	21	2 renewals
DVD/Blu-Ray	\$0.25	21	2 renewals
Lucky Day	\$0.25	21	Non-Renewable
Magazine	\$0.25	21	2 renewals
Music CD/Vinyl	\$0.25	21	2 renewals
Tool	\$1.00-\$18.00	3 or 7	Yes
Link+	\$1.00	21	1 renewal
Laptop	N/A	2 hours	Non-Renewable

Children's materials have no overdue fines. Extended Services applications are available for patrons with disabilities. Patrons with Senior cards (age 60+) pay \$0.10 per day fines on print and audio material except for Lucky Day materials which are \$0.25 per day.

Holds

All patron types are limited to 25 reserves, except for Shelter and Temporary Patron which are limited to 3 and 1 respectively.

Link+

Link+ materials have a flat fee of **\$115.00**, dependent on the lending institution, which will often times ask for the replacement cost of the book plus local processing fees.

Lost, Stolen and Damaged Materials

The Library charges a replacement fee for items that are not returned. This fee includes the price of the item as indicated in the item record and a non-refundable **\$15.00 fee**. Your account will be blocked when you have not returned an item by the time a bill is sent for it. If the items are still not returned within 8 weeks after the due date, and you owe \$50.00 or more, your account will be referred to a collection agency. If so, the account will be charged a **\$10.00** Collection Agency Fee in addition to the bill. If an item is returned damaged, your account will be charged the replacement cost. If an audiobook is returned with a missing CD, there will be a charge of **\$10.00 per disc**. If an item is returned with a missing case, there will be a charge of **\$5.00**. New replacement copies of lost items are accepted as long as they are the same edition or newer, and in the same format (hardcover, paperback, etc.)

Maximum Fines

The maximum overdue fine for **all materials is \$5.00 for each item**. Library accounts are blocked when fines exceed \$10.00. The maximum overdue fine for Link+ items is \$15.00 for each item.

Tool Lending

Tools have a loan period of 3 or 7 days, as indicated by the attached Tool Fine Schedule.

Reviewed by:	<u><i>Albert Wan</i></u>	<u><i>11/13/17</i></u>
	Director of Library Services	Date
Approved by:	<u><i>Diane Lee Davenport</i></u>	<u><i>11/13/17</i></u>
	Chair, Board of Library Trustees	Date

BERKELEY PUBLIC LIBRARY POLICIES

**SUBJECT: Circulation Policies
(Loan limits, fees and fines)**

ORIGINAL DATE:
BOLT Resolution #: R17-063
REVISED DATE: 06/06/2018
PAGE: 1 of 2

All patron types are allowed a maximum of 75 items overall and up to 4 Lucky Day items, except for Shelter and Temporary Patron cards, which are limited to 3 and 1 respectively.

Materials	Fines Per Day	Loan Period in Days	Renewals
Book	none	21	2 renewals
Book on CD/Cassette/MP3	none	21	2 renewals
Cornerstones Kit	\$1.00	7	non-renewable
DVD/Blu-Ray	none	21	2 renewals
Laptop	\$1.00 (per hour)	2 hours	non-renewable
Link+	\$1.00	21	1 renewal
Lucky Day item	none	21	non-renewable
Magazine	none	21	2 renewals
Music CD/Vinyl	none	21	2 renewals
Tool	\$1.00-\$10.00 (per schedule)	3 or 7 (per schedule)	1 renewal

Library accounts are blocked when fees exceed \$10.00 or when there are three yet-to-be returned overdue items on the account. The maximum overdue fine for Link+ items is \$15.00 for each item.

Holds

All patron types are limited to 25 reserves, except for Shelter and Temporary Patrons who are limited to 3 and 1 respectively.

Replacement Fees

The Library charges a replacement fee for overdue items that are not returned within six weeks of checkout or renewal. The patron is charged the price of the item as indicated in the item record. If an item is returned damaged, the account will be charged the same replacement fee amount. Accounts are blocked from further borrowing when an item has not been returned by the time a bill is sent for it. If the items are not returned within 8 weeks after the due date, and \$50.00 or more is owed, accounts are referred to a collection agency. If so, the account will be charged a \$10.00 Collection Agency Fee in addition to other fees.

A new copy of a lost item is accepted in lieu of payment of the replacement fee as long as the item offered is the same edition or newer, is in the same format (hardcover, paperback, etc.) as the item checked out, and the item is in *new* condition.

Link+ materials have a flat replacement fee of \$115.00, dependent on the discretion of the original lending institution, which will often times merely ask for the cost of the book plus local processing fees.

Tool Lending

Tools have a loan period of 3 or 7 days. Late fees vary by tool-type as indicated in the tool fee schedule. The majority are \$1 per day.

Miscellaneous Fees

Audiobook with missing CD - \$10.00 per disc

Lost/damaged case (DVD/CD) - \$5.00

Torn/Lost RFID Tag - \$5.00

Lost/Damaged Barcode - \$3.00

Returned check fee - \$20.00

Recovery of delinquent accounts (collection agency) - \$10.00

Other damages - as determined by staff

Printing Services

Black and White copies - .25

Color Copies - \$1.50

Reviewed by:

Director of Library Services

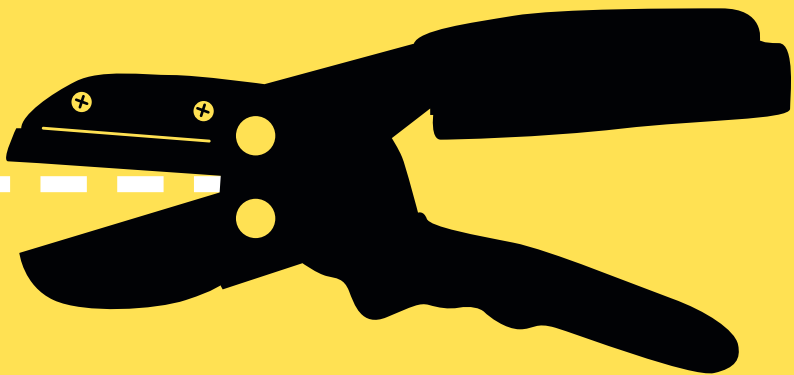
Date

Approved by:

Chair, Board of Library Trustees

Date

DRAFT



DIY WITH BPL

We're more than just hammers. But if you need those, we've got about 30 different kinds of them, along with thousands of other tools you can check out for free, and plenty of knowledgeable, friendly advice on how to get the job done right. Plus there's a sizeable collection of helpful how-to books, videos, and DVDs on construction projects, gardening, plumbing, electrical work, and more, right next door at the South Branch Library, to help you get that weekend project finally finished.

GET BUSY, BERKELEY

Berkeley residents over the age of 18, and people who own property in Berkeley, can check out up to 10 tools at a time from the Tool Lending Library. Tools may be borrowed for 3 or 7 days, depending on the item. All you need is a photo ID, a Berkeley Public Library card, and a recently received utility bill, taxbill or current lease showing your name and Berkeley address. Call us for more information about how to get started.

FINISH THE JOB RIGHT

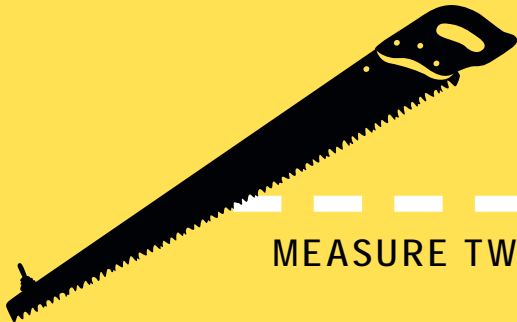
Our tools are in high demand, so it's important to bring them back on time, and only when the Tool Lending Library is open. Fines for overdue tools range from \$1 to \$18 per day. There are additional fines for returning tools dirty or damaged.

ONLINE TOOL SEARCH

www.berkeleypubliclibrary.org/tools

SAWS, SANDERS, AND DRILLS —
BUILD IT, FIX IT, MOVE IT

Weed eaters, hedge trimmers, demolition hammers and electric snakes are some of our most popular items. Ladders, cement mixers, hand trucks and dollies, plumbing tools, pipe threaders, circular saws, sanders, table saws, drills, wheelbarrows, and post-hole diggers are not far behind. But that's just for starters.



MEASURE TWICE, CUT ONCE

TOOL LENDING LIBRARY @ SOUTH BRANCH

1901 Russell Street at MLK
Berkeley, CA 94703
(510) 981-6101

HOURS

Mon	Closed
Tue	10 am – 6 pm
Wed	Noon – 8 pm
Thu	Noon – 8 pm
Fri	10 am – 6 pm
Sat	10 am – 6 pm
Sun	Closed



DIY with BPL

DISCOVER BERKELEY'S TOOL LENDING LIBRARY



BE KIND

- **Clean your tools when finished.**
- **Return on time during open hours.**

CARPENTRY & WOODWORKING

Awl \$1
Butt Hinge Marker \$1
Cabinet Scraper \$1
Chalk Line \$1
Drills (see Power Tools)
Draw Knife \$1
Flat Bar \$1
Hammers, Various \$1
Level, Various Sizes \$1
Mallet, rubber \$1
Miter Box \$1
Nail Puller \$1
Nail Set \$1
Planes, Various \$2
Plumb Bob \$1
Prybars, various \$1
Rasp, Wood \$1
Router, (w/o bits) \$5
Saws, (see Power Tools)
Saw, Dovetail \$1
Saw, hand, Crosscut \$1
Saw, Coping \$1
Saw, Keyhole \$1
Saw Horses (set of 2) \$2
Scribing Tools \$1
Shavehook \$1
Speed Square \$1
Spokeshave \$1
Squares, various \$1
Stud Sensor \$1
Surform Plane \$1
T-Bevel, Sliding \$1
Tack Claw \$1
Tack Hammer \$1
Tape Measure, Various \$1
Utility Knife \$1
Wood Chisels, Various \$1

CLAMPS

Pipe Clamps, 2' - 8' \$2
Spring Clamps \$1
Clamp, Tool Guide \$2
C-Clamps, various \$1
Handscrews \$2
Bar Clamps, Various \$2
Vise Grip Clamps \$1
Corner Clamps \$1

CONCRETE AND MASONRY

Brick, Jointing Tools \$1
Bull Float, Magnesium \$5
Full Float, wood \$5
Bull Float Handles, 6' \$2
Cement Finishing Tools \$1
(Darby, Trowels, Edgers, Groovers)
Cement Mixer, Electric \$15
Cement Mixing Box \$2
Chisels (brick, cold, bull point) \$1
Concrete Vibrator \$15
Demolition Hammer (30 lb Electric) \$18
Float (Magnesium, Wood, Rubber) \$1
Grinder (see Power Tools)
Grout Float, Various \$1
House Jacks, Various \$5
Mortar Hoe \$2
Mortar Mixing Box \$2
Rebar Cutter/Bender \$15
"Berkeley" Benders \$2
Rotary Hammer Drills
SDS \$10
Spline Drive \$15
Rotary Hammer Bits \$1-2

ELECTRICAL

Bx Cable Cutter \$2
Circuit Tester \$1
Conduit Bender, Various \$2
Extension Cords, <50' \$1-2
Fish Tape, Various \$1
Knock-Out Punch Set \$2

MEASURE TWICE, CUT ONCE

Soldering Irons \$2
Trouble Light \$1
Wire Stripper \$1

FLOOR AND WALL

Caulking Gun \$1
Carpet Cutter \$1
Carpet Edge Trimmer \$1
Carpet Knee Kicker \$5
Carpet Power Stretcher \$15
Carpet Seam Iron \$5
Carpet Seam Roller \$1
Carpet Shear \$1
Carpet Stair Tool \$1
Drywall Mudknives, Various \$1
Drywall Corner Knife \$1
Drywall Hand Sander \$1
Drywall Pole Sander \$1
Drywall Mud Pan \$1
Drywall Screwgun \$5
Drywall T-Square \$2
Floor, Roof Scraper \$2
Heat Gun \$5
Paint Scraper \$1
Plaster Darby \$1
Plaster Hawk \$1
Plasterer's Rod \$2
Tile Cutter, Ceramic & Vinyl \$2
Tile Nipper \$1

GARDENING & DIGGING

Bow Saw \$2
Broad Fork \$2
Cultivator \$2
Digging Bar, Various \$2
Fence Post Driver \$2
Garden Trowel \$1
Grass Hook (sickle) \$1
Hedge Shear, Manual \$2
Hedge Trimmer, Electric \$10
Hoe, Planter's \$2
Lawn Mower \$5
Lopping Shear \$2

Picks, Railroad \$2
Picks, Mattock \$2
Pick, Hand \$1
Pitchfork \$2
Pole Pruner \$2
Pole Pruner Ext Handle \$1
Pole Saw \$2
Post Hole Digger \$5
Pruning Saw \$2
Pruning Shear, Hand \$1
Rake (leaf, bow, grading) \$2
Shovel, Round or Square Pt. \$2
Soil Tamper, 8", 10" \$2
Spade, Garden \$2
Spading Fork \$2
Slate Bar \$2
Street Broom \$2
String Trimmer (WeedEater) \$6
Swing Sickle \$2
Telegraph Bar \$2
Trowels, Cultivators (hand) \$1

LADDERS

Extension, 16' \$10
Extension, 24', 28' \$15
Ladder Jacks \$5
Orchard Ladder (8') \$5
Step, 2', 4' \$2
Step, 6', 8', 10' \$5
Roof Jacks \$1

MATERIAL HANDLING

Piano dolly \$5
Hand Trucks (Refrigerator, Delivery) \$5
Wheelbarrow, Contractor's \$5

MECHANICAL TOOLS

Bolt Cutter, 24" \$2
Bolt Cutter, Mini \$1
Cable Cutters, Various \$1
Channellocks, Various \$1
Crimpers, Various \$1
Cutters (side & end) \$1

Impact Screwdriver \$2
Grinder (see Power Tools)
Grommet Kit \$1
Files, Various \$1
Hammer, Sledge (3,4,8,10 lb) \$2
Hacksaw \$1
Hex / Torx Key Set \$1
Nut Drivers, Various \$1
Punches, Various \$1
Pliers, Various \$1
Pop Riveter \$2
Saw, Abrasive Cut-Off \$15
Screwdrivers, Various \$1
Tin Snips, Various \$1
Staple Gun, Various \$2
Swaging Tool \$2
Vise Grips, Various \$1
Wrenches, Allen \$1
Wrench, Crescent \$1
Wrenches, Metric & Standard \$1

PLUMBING AND DRAIN CLEANING

Basin Wrench \$2
Closet (toilet) Auger \$2
Drain Flusher, Various \$1
Drain Snakes, Hand \$5
Drain Snake, Elect., 50' \$15
Faucet Handle Puller \$1
Faucet Seat Wrench \$1
Garbage disp. Wrench \$1
Gas Pressure Tester \$1
Pipe Cutter, Cast Iron \$5
Pipe Cutter, Various \$2
Pipe Reamer, Various \$2
Pipe Vise, Various \$5
Pipe Wrenches, Various \$2
Pipe Threader Die \$2
Pipe Threader Handle \$2

Tube Bender, Spring or Level \$1
Tubing Cutter \$2
Sewer Rods \$5
Shower Valve Sockets \$2
Submersible Pump \$5
Test Plug, Various \$2
Water Meter Key \$2
Water Pressure Tester \$1

POWER TOOLS

DRILLS AND BITS
Drill Motor, VSR, 1/2" \$5
Drill, Right Angle, 1/2" \$15
Drill Bit, Ship Auger \$2
Drill Bit, Bellhanger \$2
Drill Bit, Self-Feed \$2
Drill Bit, Extension \$1
Drill Press, Stationary \$5
Hand Drill \$2
Hole Saw, Various Sizes \$1
Hole Saw Mandrel \$1

SANDERS AND GRINDERS

Angle Grinder, 4-1/2" \$5
Angle Grinder, 7", 9" \$5
Belt Sander, 3x21, 4x24 \$5
Disc Sander, 7" \$5
Random Orbit Sander, 5" & 6" \$5
Vibrating, 1/4, 1/2 Sheet \$5

SAWS

Saw, Circular (Skilsaw) \$6
Saw, Power Miter (Chop) \$15
Saw, Reciprocating (Sawzall) \$5
Saw, Saber (Jigsaw) \$5
Saw, Table, 8" \$15

OR PAY THE FINE

- **The fine amount follows the tool listing.**
- **Lending periods vary from 3-7 days.**
- **Most tools can be renewed once online at berkeleypubliclibrary.org.**

Proposed Tool Lending Library Fees

Late Fees for tools are \$1 per day except for the following:

Angle Grinder, 4.5", 7", 9"	\$	5.00
Belt Sander, 3x21", 4x24"	\$	5.00
Bull Float, Wood	\$	5.00
Bull Float, Magnesium	\$	5.00
Disc Sander, 7"	\$	5.00
Drain Snake, Hand	\$	5.00
Drill Motor, VSR, 1/2"	\$	5.00
Drill Press, Stationary	\$	5.00
Hand Trucks (Refrigerator, Delivery)	\$	5.00
House Jacks	\$	5.00
Ladder Jacks	\$	5.00
Lawn Mower, Push	\$	5.00
Orchard Ladder, 8'	\$	5.00
Piano Dolly	\$	5.00
Pipe Cutter, Cast Iron	\$	5.00
Pipe Vise	\$	5.00
Post Hole Digger	\$	5.00
Random Orbit Sander, 5", 6"	\$	5.00
Saw, Circular (Skillsaw)	\$	5.00
Saw, Reciprocating (Sawzall)	\$	5.00
Saw, Saber (Jigsaw)	\$	5.00
Sewer Rods	\$	5.00
Step, 6', 8', 10'	\$	5.00
String Trimmer (Weed Eater)	\$	5.00
Submersible Pump	\$	5.00
Vibrating Sander, 1/4, 1/2 Sheet	\$	5.00
Wheelbarrow, Contractor's	\$	5.00
Cement Mixer, Electric	\$	10.00
Concrete Vibrator	\$	10.00
Demolition Hammer (30 lb, electric)	\$	10.00
Drain Snake, Electric	\$	10.00
Drill, Right Angle, 1/2"	\$	10.00
Extension, 16'	\$	10.00
Extension, 24', 28'	\$	10.00
Hedge Trimmer, Electric	\$	10.00
Rebar Cutter/Bender	\$	10.00
Rotary Hammer Drills SDS	\$	10.00
Saw, Abrasive Cut-Off	\$	10.00
Saw, Power Miter (Chop)	\$	10.00
Saw, Table, 8"	\$	10.00
Spline Drive	\$	10.00

DOING FINE(S)?

As libraries reassess fines and fees, an *LJ* survey gathers benchmarking data on from institutions across the country

By Jennifer A. Dixon

Fees and fines have traditionally been a fact of life for public libraries in America, even though a nonnegligible proportion of librarians and patrons have long considered fines at best an unpleasant hassle and at worst a serious barrier to access to resources for those unable to pay them. A number of libraries nationwide from High Plains Public Library in Colorado to Columbus, OH, to Ipswich, MA, have recently made news by eliminating charges for late returns. Others are creating fine-free cards for certain categories of patrons, such as California's Peninsula Library System's for kids and teens, or Toledo Lucas County Public Library's for active duty military personnel and veterans.

As many libraries continue to assess and overhaul their fine and fee structures, sponsored by Comprise Technologies, *LJ* surveyed a random selection of public librarians in January 2017 to learn about their libraries' approaches to fines and fees. *LJ* received 454 responses.

Slightly over half of the libraries responding, approximately 60 percent, are classified as "small," serving a population of 25,000 or less. Slightly over 20 percent were midsize, serving a population of 25,000 to 99,000; the remainder are classified as "large." Responses came from lo-

cations across the United States and ranged from suburban branches to rural libraries to a slightly smaller percentage of urban library systems.

OVERDUE FINES STILL IN THE MAJORITY

A substantial majority of public libraries continue to depend on fines and fees for some portion of revenue, with 92 percent

of survey respondents reporting fine collection for late returns. Eighty-eight percent of small libraries collect overdue fees, and 98 percent of large libraries, serving populations over 100,000, do so. Not all libraries charge fines for every type of material—for example, some (five percent) do

not charge fines for juvenile materials—but libraries almost universally charge late fees for DVDs.

Librarians in the *LJ* survey estimated that about 14 percent of borrowed materials are returned late, with patrons in larger library systems slightly more likely to return items after their due date. The vast majority of overdue materials, 88 percent, are returned within one week of the due date. Only three percent of libraries reported an average late period exceeding three weeks. The daily fines for lateness are typically small, approximately 17¢, but can add up to a maximum of \$5 to \$10, or the cost of item replacement.

Monthly revenue from fines was roughly proportionate to the size of the system. Libraries serving populations under

AVERAGE FINE & FEE COLLECTIONS

	TOTAL*	SMALL (<25K)	MIDSIZE (25K–99K)	LARGE (100K+)
Fines	\$3,345	\$449	\$2,691	\$9,788
Fees	\$1,758	\$291	\$1,241	\$6,770

SOURCE: *LJ* FINES & FEES SURVEY 2017; *Weighted

Jennifer A. Dixon is a librarian and recent graduate of the School of Information, Pratt Institute, New York

Can Your Library Go Fine-Free?

By Steven A. Gillis

Many library administrators feel that fines are a barrier to access (especially for low-income families), cost the library significant staff time, are antithetical to our mission and principles, set up an adversarial relationship, or prevent implementation of services such as autorenewal. Nonetheless, they may fear that eliminating fines is impossible owing to funding issues. That is not necessarily the case. In the face of declining budgets and increasing costs, how can a library justify removing a revenue stream? A close look at the business situation may allow for a step-by-step transition, especially as fines collected often represent less than one percent of total budgets. A small trial period may be the answer.

At the Orange Beach Public Library (OBPL), we instituted such a trial, with rigid data tracking. Even if the project were a complete disaster, the board considered six months a minimal risk. We compared collected data to a baseline averaged from our 2010–12 calendar years. Our primary data points were circulation and average time materials stayed off the shelf, but we also examined the cost of the initiative and took note of staff and patron opinions, including patron email surveys in 2013 and 2016 that collected over 2,000 responses. Most important for concerns over revenue reduction, we tracked data on fines plus donations collected in our baseline vs. our donations collected during the experiment.

ALTRUISM VS. PUNISHMENT

Initially, we used a “waive-and-request” method. Fines were unchanged in our library automation software, but we

would inform patrons that we were waiving the charges and asked if they would like to make a donation. While some chose not to donate, others donated at least the fine amount, often rounding up to the nearest dollar rather than receiving change. This method served to advertise our fine-free status, helped tracking, and sparked many questions from patrons. It also changed the tone of the interaction from punitive to altruistic, which was more pleasant for everyone.

Data from the first six months showed an overall decrease of only \$265 compared to our baseline of combined fines and donations after excluding large or organizational gifts. This amounted to a 12 percent loss for these combined revenue streams. Almost 88 percent of fine income was recovered in donations through “waive-and-request” or from increased general giving. Comparing fines actually waived in our ILS reports vs. donations collected showed that 49.9 percent of the fine values were recovered through “waive-and-request.” After six months, the experiment was considered successful enough to go forward. We continued tracking and did see some ongoing falloff. After nine months, our recovery dropped to only 41.8 percent. It may be a good idea to anticipate and plan for a drop once the novelty wears off.

Revenue from the combined streams for the same six-month season of the original experiment did decline slightly. Because our library is located at the beach, our usage can be very seasonal, so we made sure to compare the same six months for each year and included our highest fine-generating months in the snapshot. Losses for

fine incomes compared with donations fluctuated from 15 percent to 32 percent for 2014–16 (\$330–\$713). Even the highest percentage loss in 2016 was actually an increase in small donations by more than 25 percent over 2012, with this increase making up for 68 percent of our previous fine incomes. Our “waive-and-request” period ended in 2015, and in April 2015, we removed all fines at the direction of the library board.

Our test indicates that increases in donations may help mitigate the losses in fine income with the proper framing. Instead of planning for a one to two percent loss in total income, you may experience a surge in donations and goodwill. There is no real way to know if this will occur without trying a test period.

GOODWILL GROWS SUPPORT

At OBPL we were able to leverage increased goodwill with our city council. While there are many reasons for the raises in funding for our library, the goodwill of the community and the change in the overall environment from removing fines is a significant factor.

In the first year of the project, our municipal funding increased by nine percent over funding in 2012. Over the next three years, our municipal support has increased by nearly 30 percent. We currently anticipate a continuing budget of almost \$140,000 greater than our 2012 funding. With this increased revenue and support from our city, we also anticipate remaining fine free.

Steven A. Gillis is Director, Orange Beach Public Library, AL

25,000 reported an average of \$449 in fines collected each month, libraries serving from 25,000 to 99,000 reported an average of \$2,691, and libraries serving over 100,000 reported an average of \$9,788. Based on responses to this survey and the number of libraries in the United States, *LJ* has projected the amount of money collected in monthly fines at approximately \$11.8 million. This calculation is based on the total number of library systems in the United States and not the number of individual library buildings, making this a very conservative estimate.

Larger libraries are far more likely to accept credit or debit cards for fine payments than their smaller counter-

parts, with 88 percent of larger libraries accepting credit or debit cards, 65 percent of midsize, and 39 percent of smaller libraries. Nearly all responding libraries—99.5 percent—accept cash, 95.5 percent take checks.

Sixty-one percent of libraries also accept other ways to satisfy fines without monetary payment, although alternatives are less common in large systems, where just 37 percent offer such approaches. When they do, though, the results can be quite impressive: in recent amnesty programs, Chicago Public Library received at least 20,000 returned items, worth roughly \$500,000; Los Angeles Public Library received 64,633 books, and 13,701 patrons had fines forgiven

and accounts unblocked. Options include activities such as food drives, participation in programs in which patrons—usually children or teens—can “read down” their fines, donations representing a portion of the fine, or through amnesty periods. Multiple survey respondents referenced periodic fine amnesty periods as a powerful means of recovering overdue materials, which patrons may otherwise hang on to for fear of financial consequences. Indeed, the San Francisco Public Library recently held a six-week amnesty and recovered 699,563 overdue items, including 12,246 items that were more than 60 days past due.

WHERE THE MONEY GOES

The money collected is allocated to the general fund in about three-quarters of libraries. According to Jenny Paxson, readers’ advisory librarian at Webster Public Library, NY, “The money we get from fines helps us through the year. We use it as operating costs.” About 15 percent reported that funds go to materials, five percent that the money goes to programming, and six percent wrote in that fine money goes back to the city or county general fund. There have also been examples of libraries using fine revenue for other purposes—in 2016, for example, the Central Arkansas Library System donated a week’s worth of fine collections to help those affected by the extreme flooding in Louisiana earlier that summer.

Fines were originally instituted to dissuade patrons from bringing materials in late, depriving others of limited shared resources. It causes frustration for patrons and librarians alike, respondents noted, when they request items to find they are overdue and unavailable. There is a “responsibility factor,” says an Indiana library director. These are “community materials to be shared with all.”

Libraries will also take steps beyond fines for patrons who consistently hold on to their materials. Almost all libraries—97 percent—will suspend patron borrowing privileges when fines accumulate past a particular threshold, frequently around \$10. Some refer patrons to a collection agency for outstanding fines long past due or over a certain amount. This is true of 67 percent of large libraries, 57 percent of midsize libraries, and 22 percent of small libraries. The typical threshold for such action is \$42, and 54–90 days past due. Some libraries use a combination of dollar amount owed and number of days past due to determine whether they should take tougher action. A small percentage, 12 percent, have taken legal action to recoup overdue fines.

One factor leading to a decline in fine revenue for some libraries is the increasing prevalence of digital materials, which automatically “return” to the library at the end of the borrow-

ing period. Nearly a third of responding libraries stated that digital materials have reduced their fine collections.

FINE COLLECTION STRESS

The majority of libraries (90 percent) have circulation staff communicate with patrons about fines, with fewer using email (67 percent), snail mail (55 percent), or phone calls (40 percent). In some libraries, patrons receive notification via text message, on their checkout slip, or through their online account. For many library staff members, the process of collecting and enforcing fines can prove stressful. The vast majority of libraries train their staff in how to handle it, particularly in libraries serving over 100,000, where 98 percent of staff receive training, although 88 percent of staff in midsize libraries and 79 percent in smaller libraries receive training as well.

Fine collection may also present a barrier to community goodwill toward the library. Said one staffer, “It’s not worth the severed relationships when responsible customers have

a one-time occurrence, when families incur huge fines because of a vacation, or when the word of mouth messaging spreads because of any of these situations. Libraries have enough to combat, this is a matter of hospitality and being supportive of our customer needs.” Staff also feel concern about a negative effect on patrons’ use of their libraries. Says Monica Baughman, deputy director of Worthington Libraries, OH, fines can “impact those who can least afford it.” Bearing out Baughman’s point, when San José Public Library lowered fines and instituted a program for working down the amount owed through volunteering, nearly 100,000 residents had their library access restored.

(For more, see “Jill Bourne: *LJ*’s 2017 Librarian of the Year,” *LJ* 1/17, p. 28.)

The time spent collecting these fees can use up hundreds of dollars in staff time from library budgets. Some libraries have found that the effort expended to enforce fines is not worth the small amount charged per day. Not surprisingly, about a third of librarians contemplate doing away with the practice entirely.

However, with budgets tight, many libraries are concerned about losing that source of revenue. Hollis Helmecki, director, Rusk County Community Library, WI, writes, “We would have to eliminate staff if we cut fines.” In particular, some referenced resistance to such a cutback from administrators, trustees, and local government. Others emphasized a belief that fines facilitate the timely return of library materials and patron accountability, with Mary Geragotelis, director, Scotland Public Library, CT, writing that “we believe that patrons will ignore due dates completely if there is no penalty imposed for late items.”

DOES YOUR LIBRARY CHARGE FINES FOR OVERDUE MATERIALS?

	TOTAL*	SMALL (<25K)	MIDSIZE (25K–99K)	LARGE (100K+)
Yes	92%	88%	95%	98%

HAS YOUR LIBRARY EVER CONSIDERED DOING AWAY WITH FINES?

	TOTAL*	SMALL (<25K)	MIDSIZE (25K–99K)	LARGE (100K+)
Yes	34.3	25.9	31.6	53.5

SOURCE: *LJ* FINES & FEES SURVEY 2017; *Weighted

HOW MUCH DOES IT COST YOUR LIBRARY MONTHLY TO COLLECT FINES?

	TOTAL*	SMALL (<25K)	MIDSIZE (25K–99K)	LARGE (100K+)
Average \$	\$714	\$84	\$594	\$3,265

SOURCE: *LJ* FINES & FEES SURVEY 2017; *Weighted

Some librarians compromise by waiving patron fines for those who cannot pay or restructuring the fines to pose less of a burden. As Cheryl Napsha, former director of the South Fayette Township Library, PA, writes, one deterrent to removing fines entirely is “board/local government expectation that fines are part of library service. It’s easier to waive fines than to deal with the board. While our system blocks people who owe \$10 or more, we just override that or reduce fines to keep it below \$10.”

LIFE WITHOUT FINES

Of those libraries that do not impose overdue fines, 45 percent had done so in the past. Most eliminated fines more than two years prior to the survey. The majority were unsure as to whether this change had impacted their circulation and instead focused on improving customer relations. Napsha observes, “Fines and fees should not be part of a library’s revenue stream,” as they have become “a barrier to service” and to a “cordial, positive atmosphere.”

Lisa Richland, director, Floyd Memorial Library, Greenport, NY, which has done away with fines but does restrict the borrowing privileges of those who have overdue non-renewable items, reports, “folks who are dilatory about returns have not changed their habits, but the interaction at the circulation desk is much less fraught. My staff is not put in the position of punishing those who return items late, and we have a donation box for people who still have a need to pay a fine.” Even without fines, the majority of library materials do make their way back to the library eventually. Not only does this reduce staff stress levels, Richland explains, but it also helps the library maintain a “good name” in the community. “You never know what burdens people have, so we try not to judge or act in a hectoring manner.”

Contrary to concerns that fines are the key to patron accountability, Kathy Dulac of the Milton Public Library, VT, reports that after doing away with fines, more people returned books on time, and others felt more welcome in the library space. She explains, “We also found some patrons that had not been in because of fines were again coming to use the library.” While some patrons take advantage and keep books out, she explains that “we have the best results getting books back by keeping on top of overdue notices.”

To offset the lost revenue from eliminating overdue fines, a small majority of fine-free institutions have started to collect voluntary donations at the circulation desk [see “Can Your Library Go Fine-Free?,” p. 41]. Others simply adjust their operating budget, as the amount collected through fines represented a minimal percentage of the overall budget.

THE INCREASING USE OF FEES

A majority of the responding public libraries—86 percent—also collect fees for library services. Based on survey responses and the number of library systems in the country, *LJ* projected the amount of fees collected by U.S. public libraries

DAILY FINE FOR EACH TYPE OF MATERIAL

	\$ AVERAGE	\$ MEDIAN	\$ MAXIMUM
Adult Print Material	0.17	0.15	5.00
Juvenile Print Material	0.14	0.10	5.00
Adult DVD/Blu-ray/VHS	0.67	1.00	6.00
Music CDs	0.21	0.20	5.00
Audiobooks	0.21	0.20	5.00
Games	0.51	0.25	5.00
Devices	2.23	1.00	10.00

SOURCE: *LJ* FINES & FEES SURVEY 2017

each month as \$6.5 million.

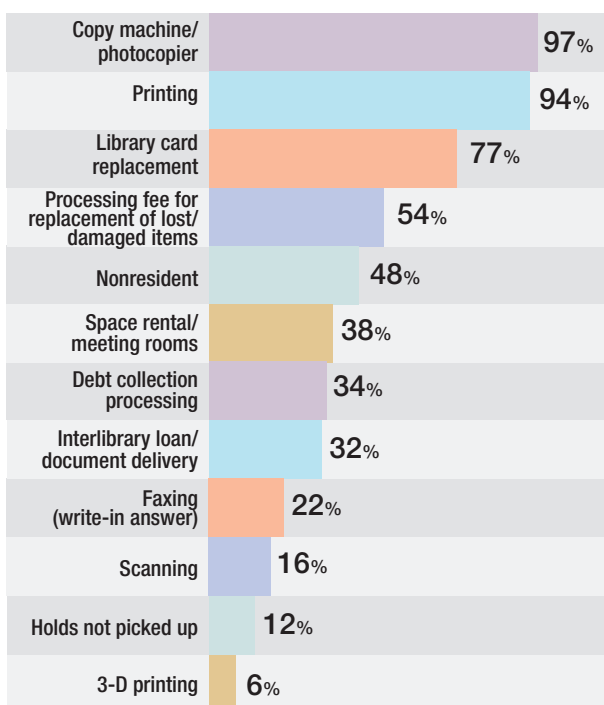
Most of those fees are for in-library copying and printing, with some also charging to replace lost or damaged library cards or damaged materials or to grant access for nonresident users. Of those charging for nonresident use, six percent reported determining the fee based on tax rates. Smaller libraries in particular charge fees for faxing and scanning, while larger li-

braries are more likely to charge for services such as interlibrary loan (ILL) or debt collection processing. For ILL or document delivery, about eight percent will assess the charge from the lending institution, while eight percent will charge the cost of return shipping. Over a third of libraries, particularly larger systems, also charge for the rental of meeting rooms or event spaces. The revenue collected from such fees enables libraries to provide services they might not otherwise be able to offer, for instance, Wi-Fi kits or 3-D printing.

One in five libraries also charges admission fees for programs or events. Common events include classes such as art or yoga, field trips, or author talks. Other examples provided by survey respondents include driver safety courses, genealogy seminars, “paint n’ sip” gatherings, and concerts. Libraries also host free events at which participants pay for materials, like craft classes, or organize fundraisers for which attendees pay a fee or a donation.

Some libraries take a flexible approach to how they charge for common services like printing and copying.

LIBRARY CHARGES A FEE



SOURCE: *LJ* FINES & FEES SURVEY 2017

Steven Harsin, director, Grand Marais Public Library, MN, describes operating “on an honor system, so we don’t know for certain whether patrons pay nor not.... Undoubtedly, some do not pay. On the other hand, there are patrons who print a couple of pages and drop \$5 in the bucket.” The library also will negotiate lower rates for large printing jobs and allows patrons to bring one copy of a tax form to be duplicated for free during tax season. Overall, library staff report efforts to adjust their fee structures in a manner that facilitates the best possible services for patrons and emphasize that these charges are never instituted to make a profit.

Many libraries are still testing what works best for their community when it comes to fee programs. Lisa Eck, Roseville Public Library, CA, notes that her library used to charge for held materials not picked up and for the processing of lost items, damages, and ILLs. However, she writes, “we have dropped [those charges] because we found that they didn’t warrant the staff time, and they caused negative experiences with our customers.”

As is the case with overdue fines, for many libraries the money collected in fees helps to support a tight institutional budget. Explains a public services librarian in Wisconsin, “As our city continues to slash our budget, our meeting room fees (collected for private events usually held on the weekends) are helping to plug the holes.”

The results of the *LJ* survey provide a picture of the ways in which libraries nationwide assess and adjust their approaches to fines and fees in order best to serve their

SERVICE FEES CHARGED

	\$ AVERAGE	\$ MEDIAN
Nonresident (per year)	46.96	32.00
Space rental/Meeting rooms for Businesses (per hour)	40.24	30.00
Debt collection processing fees	12.21	10.00
Space rental/meeting rooms for nonprofits (per hour)	8.48	10.00
Processing fee for replacement of lost/damaged items	5.58	5.00
Interlibrary loan/document delivery	3.27	3.00
Library card replacement	1.92	2.00
Faxing	1.23	1.00
Holds not picked up	1.02	1.00
Scanning	.58	.25
Color printing	.50	.50
B/W printing	.16	.15
Color copies	.49	.50
B/W copies	.16	.15

SOURCE: *LJ* FINES & FEES SURVEY 2017

patrons. The clearest trend from these results is that libraries benefit from open-mindedness about these revenue sources and a willingness to move away from entrenched traditional methods. There is a cost, in staff time and effort particularly, to collecting fines and fees from patrons, and libraries must balance this by collecting in a way that makes sense for the individual library and community. ■



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news+

Branching Out	Industry	Public
Programs That Pop	Office Hours	
Academic	People	Technology

Nashville, Salt Lake City, Columbus Go Fine-Free

Eliminating fines and fees loses some revenue but increases access

Starting the first week of July, the Nashville Public Library (NPL) and the Salt Lake City Public Library system (SLCPL) joined the increasing number of public libraries in the United States that no longer collect overdue fines from patrons. These changes will also wipe out fines that users have already accrued. The SLCPL policy took effect July 1, while the Nashville policy started July 5. For both systems, this shift reflects their missions

to remove a barrier to library borrowing—blocked card privileges owing to fines—and provide equitable access to as many patrons as possible.

According to Emily Waltenbaugh, public information officer with NPL (the 2017 *LJ* Library of the Year), library staff were concerned about the number of accounts that had been blocked because of fines exceeding a \$20 limit. They discovered that as many as 50,000 cards were blocked at any given time,

out of a total of 300,000 cardholders.

Patrons will still receive reminders when a due date approaches and when it has passed. In addition, once 31 days have passed after a due date, the materials will be considered “lost” and patrons will be billed.

The move to a fine-free NPL received overwhelming support from local government as well as from the library board. The change removes approximately \$159,000 collected in fines each year from the local Nashville general fund; Mayor Megan Barry reflected this reduction in the budget approved in June. This amount works out to .02 percent of Metro Nashville government’s \$1 billion budget.

branching out

Prince George’s County Memorial Library System, MD, welcomed the renovated **Bowie Branch** on June 29. The nearly six-month remodel, the first major construction to the 40,449 square foot branch since 1999, includes a Main Street-themed children’s space, eight new study rooms, a bookstore/café, an updated teen zone, new service desks, additional electrical outlets, a meeting room kitchenette, and fresh lighting fixtures. Helmed by Gant Brunnett Architects, with Nardi Construction, Inc., the project is partially funded through the County Library Capital Grant Program, Maryland State Library.

Kentucky is taking part in the grant-making game, with ten libraries supported through \$20 million in construction funds from the Department of Libraries and Archives.

The grant is designed as an annual allotment over 20 years to cover construction debt. Among the libraries is the **Clay County Public Library** in Manchester, which will expand its footprint of 6,789 square feet into an adjoining space that was purchased a year ago and also houses the Clay County Historical Society. An annual annuity of \$18,200 for 20 years will help to cover costs.

The New York Public Library’s main circulating branch, the **Mid-Manhattan Library**, is set to be transformed. The 159,880 square foot building closed on August 1 for a two-year, \$200 million overhaul. Among the amenities will be “a multistory wall of bookshelves,” a business library, dedicated children’s and teen sections that will take up an entire floor, a free public roof



Newberry Library

terrace, and “hundreds of additional seats,” according to a library press release. Patrons will find an interim branch set up on the ground floor of the landmark Schwarzman Building across the street. The design team includes the visionary Dutch firm Mecanoo and New York City-based Beyer Blinder Belle, experts in historical renovation.

The **Newberry Library**, Chicago, an independent research library dating back to 1893, has an \$11 million renovation on its agenda. The Romanesque facility

will undergo a remodel of 26,000 square feet of public space on the ground floor to include new galleries, an enlarged bookstore with a lounge, digital signage, and public workstations. Additionally, the entrance will feature more plantings and less fencing, while the Ruggles Hall event area will get a makeover as well. Ann Beha Architects will lead what is hoped to be a six-month project, to launch in January 2018. The effort has already banked 40 percent of funding through private donations.—**Bette-Lee Fox**

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INFORMATION REPORT

June 6, 2018

To: Board of Library Trustees

From: Dennis Dang, Administrative and Fiscal Services Manager

Subject: FY18 – 3rd Quarter YTD Budget Report

INTRODUCTION

Library fiscal year 2018 3Q results by Fund are as follows:

Fund	Revenue		Expenditures (xcl Encmb)	
	Actual 9-mos	YoY	Actual 9-mos	YoY
Library Tax (301)	\$14,010,110	46.5%	\$12,421,722	0.5%
Transaction Based Reimb (302)	\$899	-94.4%	\$8,008	-73.4%
Grants (304)	\$57,852	-21.3%	\$26,545	-25.1%
Public Library (305)				
Gifts (306)	\$107,322	-3.0%	\$69,851	24.6%
BPL Foundation (307)	\$25,000	-7.7%	\$36,081	25.2%

FISCAL IMPACTS

Not applicable.

BACKGROUND

FY 2018 is the first year of the two-year biennial budget cycle encompassing fiscal years 2018 and 2019. The two year biennial budget was adopted by the Board of Library Trustees on May 31, 2017 by Resolution No.: R17-032. On September 6, 2017, by approval of Resolution No.: 17-043, the board updated the fiscal year 2018 budget to accept into the budget carried over prior-year encumbered values and other budget adjustments as part of the first amendment to the FY 2018 Annual Appropriations Ordinance (AAO). On April 4, 2018, by approval of Resolution No.: 18-014, the board accepted into the budget a second FY 2018 AAO budget adjustment to transfer into the Library Tax Fund (301) the remaining balance in the Public Library Fund (305) and to close the Public Library Fund (305) which has not received revenues since FY 2011.

CURRENT SITUATION AND ITS EFFECTS

LIBRARY TAX FUND

The Library Tax Fund (301) includes revenue derived from the dedicated library tax, fines and fees, and miscellaneous revenue. At the end of the third quarter, Fund revenues stood at \$14,010,110 representing an increase of 46.5% YoY. This rise in receipts amounting to \$4,446,495 is primarily due to timing – 3Q-FY17 receipts were 54.4% of the budget versus current receipts at 73.7% of the FY18 budget – and resulted in period-end library tax collections of \$13,855,335 versus \$9,405,417 in the prior year. Other revenues sources such as fines and fees fell \$11,647 year-to-date; however, miscellaneous revenue was up year-over by \$8,141 resulting from the recording of public-use photocopier receipts in the Library Tax Fund beginning in FY 2018.

Library Tax Fund expenditures excluding encumbrances at \$12,421,722 were essentially flat to the prior year rising only 0.5% and yielding an unfavorable variance of \$62,859. Payroll costs were slightly lower than at this time last year with a favorable variance of \$15,758. Within payroll costs, CalPERS retirement expenses were lower year-over by a favorable \$137,941 offset by \$84,230 in higher salary and wage expenses stemming mainly from hourly staff (pages and intermittents) wages, and additional hours worked by part-time staff. Similar to payroll expenses, other non-labor YoY costs held close to the prior year period at a moderate increase of \$78,617, and tipping total FY 2018 3rd quarter expenses only \$62,859 above the prior year. Library materials spending is markedly up year-over by \$230,247 as the Library aggressively invests in expanding the electronic materials collection subsequent to the \$200,000 in appropriations increase authorized in the first amendment to the FY 2018 Annual Appropriations Ordinance (AAO) on September 6, 2017. Major offsetting savings to non-labor costs derived primarily from one-time projects completed in FY 2017 encompassing the purchase of an additional server and module services for the upgrade to the Innovative Interfaces “Sierra” integrated library system, workstation replacements in the Technical Services and Information Technology divisions, as well as expenses for legal and recruitment services.

BPL FRIENDS & GIFTS FUND

The Friends & Gifts Fund (306) includes monies received through donations from the Friends of the Berkeley Public Library, the generosity of many individuals and organizations, and trusts. During the third quarter the Fund received the second and final installment payment in the amount of \$54,000 of the fiscal year’s \$104,000 commitment from the Friends of the Library. Donations and interest on the Fund’s balance at \$3,322 make up the remainder of revenues received to date.

Actual expenditures (net of encumbrances) at \$69,851 were 0.6% higher than the prior year. Expenses paid for with Friends’ gift funding included approximately \$60,500 for library materials, and \$8,757 in support of library public programs of which \$5,493 was attributable to Childrens’ programming.

LIBRARY FOUNDATION FUND

The Foundation Fund (307) captures all funding support received either directly from the Berkeley Public Library Foundation or passed through the Foundation. To date the Library has received a single in-kind donation of \$25,000 from the Foundation for staff LUMA Institute training that occurred at the West Branch Library in September 2017. Spending in the Fund at \$36,081 supported initiatives such as Berkeley Innovators (LUMA Institute training) at \$26,313, Berkeley Builds Readers for \$2,824, and Cornerstones of Science programs to date at \$5,233. Spending from the Pace Trust (14LB29) was suspended in early FY 2017 but allowed for utility expenditures, this suspension (now inclusive of utilities) is ongoing and consequently did not provide budgeted appropriations for FY 2018 and FY 2019.

ALL OTHER FUNDS

All Other Funds is composed of funding primarily from California State Library administered programs such as the California Library Literacy Services program, and the Library Services and Technology Act.

The Public Library Fund (305) was closed by acceptance of BOLT Resolution No.: 18-014 on April 4, 2018. Any remaining balance in the Public Library Fund (305) was transferred into the Library Tax Fund (301).

TBR Fund (302) revenue ended the third quarter with \$899 in receipts attributable solely to the Link+ program. The TBR Fund’s earnings no longer include revenue derived from public-use photocopiers – effective FY 2018, public-use photocopier revenues and expenses are assigned to the Library Tax Fund (301); consequently, revenues dropped unfavorably \$15,166 or 94.4% year-over. A favorable expense variance of \$22,136, is due to the transfer of public-use photocopier equipment lease payments to the Library Tax Fund (301).

By period-end, the Grants Fund (304) sole revenue received was the full commitment of \$57,852 from the California Library Literacy Services 2018/2019 fiscal year award in support of the BerkeleyREADS adult literacy program. Spending to-date of \$26,545 was entirely for BerkeleyREADS.

SUMMARY OF OPERATIONAL EXPENSES

At the end of the third quarter, actual expenses excluding encumbrances in the operating Funds (301, 302, and 304) were 65.2% to the revised budget – versus the 3rd quarter period benchmark of 75%. In the Library Tax Fund (301), favorable variances are compensation costs \$1,276,388 below the revised budget benchmark and other non-staffing costs \$1,798,192 under the benchmark level. The bulk of savings are due to position vacancies and deferral of the construction phase of the Central Library space planning project now anticipated to be undertaken in FY 2019.

A year-end closing financial report to be presented to the board is projected for the month of October.

CONTACT PERSON

Dennis Dang, Administrative and Fiscal Services Manager, 510-981-6118

Attachment

1: 3Q-FYTD 2018 Revenues by Fund

2: 3Q-FYTD 2018 Expenditures by Fund

3Q-FYTD 2018 REVENUES BY FUND

BERKELEY PUBLIC LIBRARY									data as of:
REVENUE MAR FY18									19-Apr-18
Berkeley Public Library									
Ele/Obj	Account Description	Lib Dscr 301	DL/ILL 302	Grants 304	Frnd/Gift 306	FF&E 307	Mse FF 308	Rfse Coll 820	Revenue FY18
01-01	Refund on Bills	2,000							2,000
05-01	Over and Shorts								
10-01	Collection by City							11,089	11,089
13-15	Library Tax	18,786,687							18,786,687
20-07	Library Svc&Constr Act			60,000					60,000
20-11	Library Fines	175,000							175,000
20-12	Link + Fines		1,500						1,500
20-15	Lost Book Fines	20,000							20,000
20-21	Tool Lending Fines	7,000							7,000
20-99	Private Donations-Miscellaneous								
23-12	BPL Foundation					211,000			211,000
23-13	Friends of BPL				90,000				90,000
30-01	Interest-Investment Pool								
50-02	Inter-Library Book Loan								
50-03	Direct Book Loan								
65-01	Meeting Room Fees	250							250
80-99	1-Time Grant /w Proj Code								
99-01	Carryover/AAO								
99-03	Donations								
99-99	Miscellaneous Revenue	30,000							30,000
Adopted	Berkeley Public Library	19,020,937	1,500	60,000	90,000	211,000		11,089	19,394,526
01-01	Refund on Bills	2,000							2,000
05-01	Over and Shorts								
10-01	Collection by City							11,089	11,089
13-15	Library Tax	18,786,687							18,786,687
20-07	Library Svc&Constr Act			60,000					60,000
20-11	Library Fines	175,000							175,000
20-12	Link + Fines		1,500						1,500
20-15	Lost Book Fines	20,000							20,000
20-21	Tool Lending Fines	7,000							7,000
20-99	Private Donations-Miscellaneous								
23-12	BPL Foundation					211,000			211,000
23-13	Friends of BPL				90,000				90,000
30-01	Interest-Investment Pool								
50-02	Inter-Library Book Loan								
50-03	Direct Book Loan								
65-01	Meeting Room Fees	250							250
80-99	1-Time Grant /w Proj Code								
99-01	Carryover/AAO								
99-03	Donations								
99-99	Miscellaneous Revenue	30,000							30,000
Adjusted	Berkeley Public Library	19,020,937	1,500	60,000	90,000	211,000		11,089	19,394,526
01-01	Refund on Bills								
05-01	Over and Shorts	10							10
10-01	Collection by City							9,731	9,731
13-15	Library Tax	13,855,335							13,855,335
20-07	Library Svc&Constr Act			57,852					57,852
20-11	Library Fines	116,811							116,811
20-12	Link + Fines		899						899
20-15	Lost Book Fines	13,687							13,687
20-21	Tool Lending Fines	5,519							5,519
20-99	Private Donations-Miscellaneous					25,000			25,000
23-12	BPL Foundation	3							3
23-13	Friends of BPL				104,000				104,000
30-01	Interest-Investment Pool				3,042				3,042
50-02	Inter-Library Book Loan								
50-03	Direct Book Loan								
65-01	Meeting Room Fees								
80-99	1-Time Grant /w Proj Code								
99-01	Carryover/AAO	6,836,082	106,601	33,831	353,346	1,016,768	1,333,962		9,736,873
99-03	Donations				280				280
99-99	Miscellaneous Revenue	18,745							18,745
Actl+Upstd	Berkeley Public Library	20,846,192	107,500	91,683	460,668	1,041,768	1,333,962	9,731	23,947,787

3Q-FYTD 2018 EXPENDITURES BY FUND

BERKELEY PUBLIC LIBRARY : EXPENDITURES MAR FY18									9	75.0%
Berkeley Public Library + CoB				Actuals+Encumbrances					YTD MAR	
Elmnt- Object	Description	Bdgt ORG FY18	Bdgt RSV FY18	Lib Dscr 301	DL / ILL 302	Grants 304	Frnd/Gift 306	Fndtn 307	Actual FY18	% RSV Spent
11-01	Monthly Rated Employees	8,747,332	8,747,332	5,598,300					5,598,300	64.0%
11-03	Hourly and Daily Rated Empl	258,799	258,799	173,678		22,661		319	196,658	76.0%
11-04	Monthly Rated - Part Benefitted	108,660	108,660	27,690					27,690	25.5%
11-59	Reg Retro Gross Adjust.			7,689					7,689	
11-60	Excess Hours Pay			259,856					259,856	
13-01	O/T-Monthly Rated Employee	6,771	6,771	140					140	2.1%
13-05	Holiday Pay	5,081	5,081							
Prsnl Svcs-Salaries and Wages		9,126,643	9,126,643	6,067,353		22,661		319	6,090,333	66.7%
20-11	Medical Insurance	1,507,683	1,507,683	932,933					932,933	61.9%
20-12	Dental Insurance	187,373	187,373	105,202					105,202	56.1%
20-13	Life Insurance	7,089	7,089	4,454					4,454	62.8%
20-21	Cash-in-Lieu	138,195	138,195	77,794					77,794	56.3%
20-31	Pers/Misc Other	2,903,651	2,903,651	1,751,601					1,751,601	60.3%
20-34	PARS (3.75%)	14,154	14,154	7,471		850		12	8,333	58.9%
20-36	SRIP	296,089	296,089	195,910					195,910	66.2%
20-40	Medicare Tax	116,698	116,698	79,055		316		4	79,375	68.0%
20-63	Retirement Med: Misc. Emp Medical Trusts	184,971	184,971	123,140					123,140	66.6%
20-71	Workers Comp: Workers Comp Charges	193,543	193,543	135,491		410		6	135,907	70.2%
20-82	Allowances: Shoes Allowance	1,212	1,212	1,212					1,212	100.0%
20-87	Terminal Payouts-Misc.Emp	163,881	163,881	109,939					109,939	67.1%
20-90	Other Employee Benefits	235,247	235,247	201,310					201,310	85.6%
20-91	Commuter Check	24,165	24,165	15,852					15,852	65.6%
27-20	Fringe Benefits (Budget)	12,546	12,546							
Prsnl Svcs-Fringe Benefits		5,986,497	5,986,497	3,741,364		1,576		22	3,742,962	62.5%
20-99	Salary Savings	(300,000)	(300,000)							
Personal Services-Employee		14,813,140	14,813,140	9,808,717		24,237		341	9,833,295	66.4%

3Q-FYTD 2018 EXPENDITURES BY FUND

BERKELEY PUBLIC LIBRARY : EXPENDITURES MAR FY18									9	75.0%
Berkeley Public Library + CoB				Actuals+Encumbrances					YTD MAR	
Elmnt- Object	Description	Bdgt ORG FY18	Bdgt RSV FY18	Lib Dscr 301	DL / ILL 302	Grants 304	Frnd/Gift 306	Fndtn 307	Actual FY18	% RSV Spent
30-35	Professional: Engrng & Architecural Svcs	325,000	269,052	74,052					74,052	27.5%
30-38	Professional: Misc Prof Svcs	466,450	504,527	298,335			5,035	4,900	308,270	61.1%
30-39	Hazardous Materials Handling	2,000	2,000							
30-42	Maint Svcs: Office Equip Maint Svcs	6,500	6,500	1,770					1,770	27.2%
30-43	Maint Svcs: Bldg & Structures Maint Svcs	174,000	271,195	267,381					267,381	98.6%
30-44	Maint Svcs: Field Equip Maint	17,250	23,350	7,000					7,000	30.0%
30-46	Maint Svcs: Computer Maintenance	5,000	5,332	4,600					4,600	86.3%
30-47	Maint Svcs: Software Maintenance	346,000	357,495	341,362					341,362	95.5%
30-51	Bank Credit Card Fees	4,500	4,500	2,967					2,967	65.9%
Purchased Prof & Tech Svcs		1,346,700	1,443,951	997,467			5,035	4,900	1,007,402	69.8%
35-15	Permit Fees		136					136	136	100.0%
35-20	County/State/Fed Pymts.	5,000	5,000	4,007					4,007	80.1%
Grants & Gvrnmntl Payments		5,000	5,136	4,007				136	4,143	80.7%
40-10	Professional Dues and Fee	47,250	47,250	47,052					47,052	99.6%
40-31	Communications: Telephones	112,200	143,105	105,505					105,505	73.7%
40-33	Communications: Cellular	14,550	14,550	3,352					3,352	23.0%
40-41	Utilities: Water	35,000	40,375	34,500					34,500	85.4%
40-42	Utilities: Gas/Electricity	300,000	300,000	270,000					270,000	90.0%
40-43	Utilities: Refuse	34,252	33,177	15,393					15,393	46.4%
40-50	Printing and Binding	15,600	17,129	4,100		1,000			5,100	29.8%
40-61	Travel: Commerical Travel	5,000	5,000	924					924	18.5%
40-62	Travel: Meals & Lodging	9,000	9,000	3,441					3,441	38.2%
40-63	Travel: Registration/Admin Fees	38,500	63,500	13,961				25,000	38,961	61.4%
40-64	Travel: Transportation	3,000	3,000	978					978	32.6%
40-70	Advertising	30,000	20,750	4,332					4,332	20.9%
40-80	Books and Publications		3,500	3,500					3,500	100.0%
40-90	Other	470,000	115,950							
Other Purchased Services		1,114,352	816,286	507,038		1,000		25,000	533,038	65.3%
50-10	Rental of Land/Buildings	1,500	1,500	1,248					1,248	83.2%
50-20	Rental of Equip/Vehicles	46,500	46,700	29,200					29,200	62.5%
50-30	Rental of Office Equipment & Furniture	10,000	11,408	5,000					5,000	43.8%
50-40	Rental of Software & Licenses	75	75							
Rentals / Leases		58,075	59,683	35,448					35,448	59.4%

3Q-FYTD 2018 EXPENDITURES BY FUND

BERKELEY PUBLIC LIBRARY : EXPENDITURES MAR FY18									9	75.0%
Berkeley Public Library + CoB				Actuals+Encumbrances					YTD MAR	
Elmnt- Object	Description	Bdgt ORG FY18	Bdgt RSV FY18	Lib Dscr 301	DL / ILL 302	Grants 304	Frnd/Gift 306	Fndtn 307	Actual FY18	% RSV Spent
51-10	Postage	33,000	31,592	15,332					15,332	48.5%
51-20	Messenger/Deliver	18,000	18,000		12,000				12,000	66.7%
Mail Services		51,000	49,592	15,332	12,000				27,332	55.1%
55-11	Office Supplies	44,815	48,465	24,914		44			24,958	51.5%
55-20	Field Supplies	186,930	247,651	143,590		5,569	424	5,911	155,494	62.8%
55-34	Equip & Veh Supp: Spare Replacement Parts	6,000	3,997	3,262					3,262	81.6%
55-50	Food	2,200	14,630	880		1,100	6,425	1,659	10,064	68.8%
55-60	Library Materials	1,345,409	1,710,909	1,524,870			66,378		1,591,248	93.0%
Supplies		1,585,354	2,025,652	1,697,516		6,713	73,227	7,570	1,785,026	88.1%
60-20	Outside Janitorial Svcs	205,000	206,910	206,910					206,910	100.0%
Purchased Property Services		205,000	206,910	206,910					206,910	100.0%
65-70	Building - Existing Construction	1,600,000	1,512,948	26,135					26,135	1.7%
Infrastructure		1,600,000	1,512,948	26,135					26,135	1.7%
70-41	Machinery and Equipment	4,000	36,981	6,348					6,348	17.2%
70-43	Furniture and Fixtures	75,000	178,639	17,840				119,443	137,283	76.8%
70-44	Computers & Printers	20,000	161,966	56,513					56,513	34.9%
70-47	Computer Softwares & Lic	15,000	15,000	14,717					14,717	98.1%
Property		114,000	392,586	95,418				119,443	214,861	54.7%
71-10	Small Equipment	14,400	14,449	2,694					2,694	18.6%
71-43	Mach & Equip: Furniture And Fixtures		2,108	1,134					1,134	53.8%
71-44	Mach & Equip: Computers And Printers	95,000	93,770	39,201					39,201	41.8%
71-47	Mach & Equip: Software & Licenses	11,000	13,777	12,709					12,709	92.2%
Property Under Cap Limit		120,400	124,104	55,738					55,738	44.9%
75-35	Mail Services	1,764	1,764	1,323					1,323	75.0%
75-40	City Vehicles/Replacement Contribution		3,167	4,433					4,433	140.0%
75-50	City Vehicles/Fuel & Main	7,800	7,800	10,340					10,340	132.6%
75-60	City Parking Permits	500	500							
Internal Services		10,064	13,231	16,096					16,096	121.7%
99-01	Appropriations Ord #1		(250,000)							
99-11	Appropriations Ord #1 Offset Acct		250,000							
Balance Sheet Accounts										
Other Expenses		6,209,945	6,650,079	3,657,105	12,000	7,713	78,262	157,049	3,912,129	58.8%
Berkeley Public Library + CoB		21,023,085	21,463,219	13,465,822	12,000	31,950	78,262	157,390	13,745,424	64.0%



INFORMATION REPORTS

June 6, 2018

To: Board of Library Trustees

From: Elliot Warren, Acting Director of Library Services

Subject: Director's Report

Programming: Free Comic Book Day

Free Comic Book Day is a national celebration of the comics format; it is also one of Berkeley Public Library's most popular initiatives. All five BPL locations participated in this year's Free Comic Book Day on May 5 by offering free comic books to the community along with programming designed to promote reading and creativity. Programming was extremely popular this year, with all locations reporting at higher participation than anticipated: 159 people attended a crafting and cartoons afternoon at Tarea Hall Pittman South Branch; 107 patrons stopped by the Central Children's Room for comics and crafting; at West Branch 65 patrons made buttons while picking up comics; at Claremont, 50 patrons attended a cartooning workshop. At North Branch, 40 patrons met cartoonists and waited patiently for sketches, and more than 100 patrons created their own mini-books. In addition to this well-received programming, the Library distributed 2,400 comic books to at least 800 patrons system-wide.

Programming: Summer Reading Program Preparation

The Summer Reading Program starts June 15, and Library staff are in full promotional swing! Librarians are spreading out across the Berkeley Unified School District, where they will visit every elementary and middle school class in the district, as well as classes at Berkeley High School and Berkeley Technical Academy. Library staff are also working with reading coaches at the elementary schools on family literacy nights, promoting summer reading to families ahead of the summer vacation.

Programming for the whole family starts with Summer Reading Kickoff events, including a special Bonnie Lockhart performance at Tarea Hall Pittman South Branch, a *Magic Fairy Show* at North Branch, and the ever-popular *Elephant and Piggie how* at Claremont Branch. Other events in June include a *Sushi Soiree* at Claremont Branch (June 23) and *Jelly Jam Time Puppets* at West Branch (June 30). This summer, Central Library will be hosting three *Naturalist Nights*, in partnership with East Bay Regional Parks; the first in the series, *Wildlife, Waterfalls, Wildflowers and Migrations*, will be held on June 26.

Everyone signing up for Summer Reading will receive a free book! Patrons of all ages will be able to choose from dozens of award-winning and best-selling titles from authors including Mo Willems, Gene Luen Yang, JK Rowling, Raina Telgemeier, Marie Lu, Daniel José Older and others. This year we've added more adult-interest titles, including bestsellers from Alice Waters, Maria Semple, Jesmyn Ward, and others.

In addition to events at the Library, Berkeley Public Library will be taking Summer Reading on the road, visiting summer learning sites, signing students up for Summer Reading, and distributing books for kids to keep at each visit.

Programming: Friends of the Library Support

The Library requested \$105,000 for fiscal year 2019 public programming from the *Friends of the Berkeley Public Library* and it was unanimously granted via vote by the Friends board in May. In 2018 the Friends

supported public programming and collections refreshing. In 2019, the entirety of Friends gift monies will pay for public programming, including the Summer Reading Program. Thank you, Friends of the Library!

Central Library Space Planning

The Library has initiated the removal of granite table tops, desks, and catalog computers to be replaced by a laptop lending machine, new seating, and tables on the first floor of the Central Library. Public Services Staff have been provided a set of talking points for patrons curious about the continued work. The primary goal of the space is to enable a wide range of seating options for reading, laptop use, collaborating with others, working individually, and group get-togethers. 44 new seats will be added to the Central Library capacity, a net gain of 32 new seats. A secondary goal is to enable expanded access to device charging locations.

Technology Update

Claremont Branch was the first BPL site to receive a Prowise TouchScreen, funded by the *Berkeley Public Library Foundation*. Claremont does not have the audio-visual capabilities present at other library locations, and the touchscreen, a high-definition, interactive screen, and has already been used for programs including film screenings and gaming. Claremont staff are also using the educational software that comes with the Prowise to enhance existing programming, including the Third Grade Bookclub. Future programming plans at Claremont Branch include the CineKids international film series, opening with Japanese fantasy film *Mary and the Witch's Flower* (Meari to Majo no Hana) on July 21.

Thanks to the success of this grant, the Library made a second successful grant request from the Library Foundation for two additional screens (one for West ranch and one for the Central Library) and received them in late May. These devices are currently being set up and staff will be prepared with training to enable them to easily incorporate them into their programming. Central's will also be used for staff meetings and teleconferencing as needed.

Cash Handling and PCI Compliance Trainings

During the months of March, April, and May, Library Administration staff conducted *Cash Handling* and *PCI DSS (Payment Card Industry Data Security Standard)* staff training sessions. All Library (as well as City) staff involved with cash, credit card, and debit card transactions are required to attend these 1.5 hour training sessions annually. The *Cash Handling* training addressed the proper handling of cash, and the *PCI DSS (Payment Card Industry Data Security Standard)* addressed payment card processing risks and is mandated for compliance with PCI Council regulations. The bulk of Library staff elect to attend the Library-provided sessions due to the focus being tailored to the Library environment. Each of the branches and Central Library hosted sessions. 47 staff members attended.

Collections Update - Kanopy Kids

Kanopy Kids is now included in our existing Kanopy Video platform. Users are now be able to navigate to a kid-friendly interface loaded with high-interest video content from a wide array of sources. Kanopy Kids boasts a parent portal that further enables parents to limit access.

CONTACT PERSON

Elliot Warren, Acting Director of Library Services, Library, 510-981-6195

Attachments

1. Central Library Interior Improvements Project Talking Points

Central Library Interior Improvements Project Talking Points:

What are we doing?

- Thanks to the generosity of the Berkeley Public Library Foundation, we are updating the Library's first and second floors.
- The first phase is to add seating to the first floor while also expanding access to electrical outlets and borrowable laptop computers. Over 40 new seats and a good number of tables will be added.
- A new laptop lending machine will allow easy check out of laptop computers.
- Many of the new tables are designed for comfortable laptop use. New seating options will vary, including reading seats, study seats, low seats, and high tabletop seats.
- During the second phase to start in 2019, we will be adding a new, dedicated teen space; modernizing shelving; improving programming spaces; redesigning the public computing and reference room areas; and updating lighting and electrical access.
- Our goal is a building that retains its historical qualities, especially on the second floor; improves access to books and other media; while also improving seating options and programming spaces.

Why?

- In 2002 (16 years ago!), the Central Library was renovated and expanded, creating many new areas of the Library, including a new meeting room, a children's floor, an art & music floor, and much more. That renovation was extremely successful and resulted in a much higher use of the Central Library than previously. However, it was designed prior to the everyday acceptance and use of handheld and laptop devices.
- Beyond supporting patrons' use of personal technology, the Library hopes to enhance access to its book collections and programming spaces.
- The new updates are designed to reflect how people currently use the Library: to meet friends, or for time alone; to work independently on a laptop, or to work collaboratively in quiet discussion with others; to easily find books to read, or to find a place to sit and read books in comfort; to feel like part of a community by attending a participatory program, or for quiet respite from other people; to comfortably use new technology, or to escape from a world of technology. With our new design, we hope to accommodate a multitude of Library uses.

When?

- Phase one is happening in May and June, with planned completion of a new first floor seating area by the end of June.
- We are in design phase for elements of the second floor and teen room. We will likely initiate work on that second phase in mid-2019.