



Jacksonville Public Library Consolidated/Centralized Services



Start Here. Go Anywhere.

CONSOLIDATION

GOOD FOR LIBRARY SERVICE?



- 2.7 Million choices
- Delivered to the location nearest you.

CONSOLIDATION

GOOD FOR LIBRARY SERVICE?



WATER CONTINUES ON A-6

Jacksonville library to offer instant streaming services

Hoopla Digital system is expected to go live by end of December

By Teresa Stepzinski
teresa.stepzinski@jacksonville.com

A library card soon will give Jacksonville Public Libraries patrons free ac-

cess to instant streaming and temporary downloading of movies, television shows, music and more to their mobile devices and computers.

Hoopla Digital, which is an electronic borrowing service, should go live by the end of December. Jacksonville joins about 25 other public library sys-

tems nationwide that already have it or are in the process of launching the service, which is similar to Netflix.

Jacksonville will be the only library system on the First Coast to offer Hoopla, although the Orange County Library System in Orlando has it and the Lee County Library System in

Fort Myers is testing with the intention of going live also at the end of December.

Barbara Gubbin, Jacksonville library director, said providing access to information is a key priority. Hoopla will allow the library to provide a diverse selection of entertainment as well as educational pro-

grams to customers via smartphones, tablets and computers.

"Customers want information to be available to them anytime, anywhere and in a format they can access easily. ... It's important to us that we stay current with the technology

LIBRARY continues on A-6

Weather
A few more clouds

87 Today's high

67 Monday morning's low

DAILY DEAL!

Carpet steam cleaning: Three areas with free deodorizer for \$89.95 **Details, A-2**

| | | |
|------------|--------|------------|
| Classified | 6 | Legals |
| Comics | Inside | Life |
| Crosswords | F-4 | Money |
| Editorials | E-4 | Obituaries |



Jacksonville Public Library Consolidated/Centralized Services



Start Here. Go Anywhere.

Are Centralized Services
a benefit or detriment
to the library?

CENTRALIZED SERVICES

BENEFIT OR DETRIMENT?



“An independent tax district, governed by elected officials, is the best means for [achieving the goal].”



The Jacksonville Public Library Capacity Plan: Recommendations from the Board of Library Trustees

Introduction

Jacksonville Residents Love Their Libraries. They voted to *tax themselves* to build more libraries when they passed The Better Jacksonville Plan in 2000; they flooded the doors when the ensuing construction was completed in 2005¹; and impassioned citizens write letters to the editor, sign petitions, and protest whenever a branch is threatened.

The Need for a Capacity Plan. Nevertheless, since 2005, library staffing has been cut by **one fourth**, and investment in the materials collection, the life blood of the library, has been cut by a **third**. Consequently, the Board of Library Trustees commissioned Godfrey's Associates Inc. to analyze the capacity of this system to provide quality library service to Jacksonville into the future.² Section 90.104 of the City of Jacksonville Municipal Code directs the board to "provide

FIVE CRITICAL RECOMMENDATIONS

FOR THE FUTURE OF THE
JACKSONVILLE PUBLIC LIBRARY



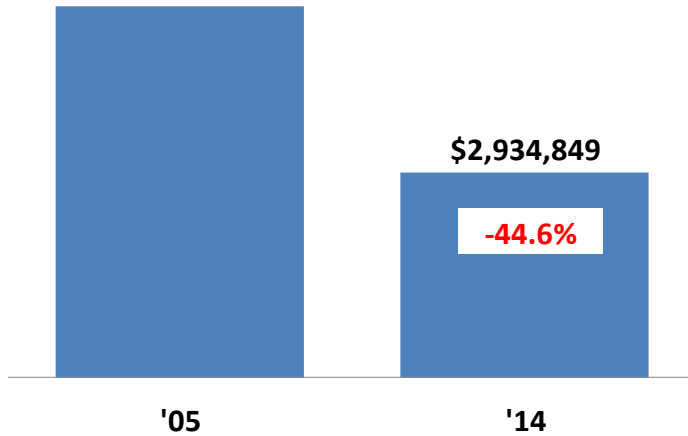
1. STRENGTHEN INFORMATION DELIVERY.
2. MAINTAIN BUILDINGS ADEQUATELY.
3. REMEDY INEQUITIES IN LIBRARY SERVICE.
4. STABILIZE FUNDING.
5. ENSURE FLEXIBILITY IN STAFFING.

THE INCREDIBLE SHRINKING BUDGET



Budget For Library Materials

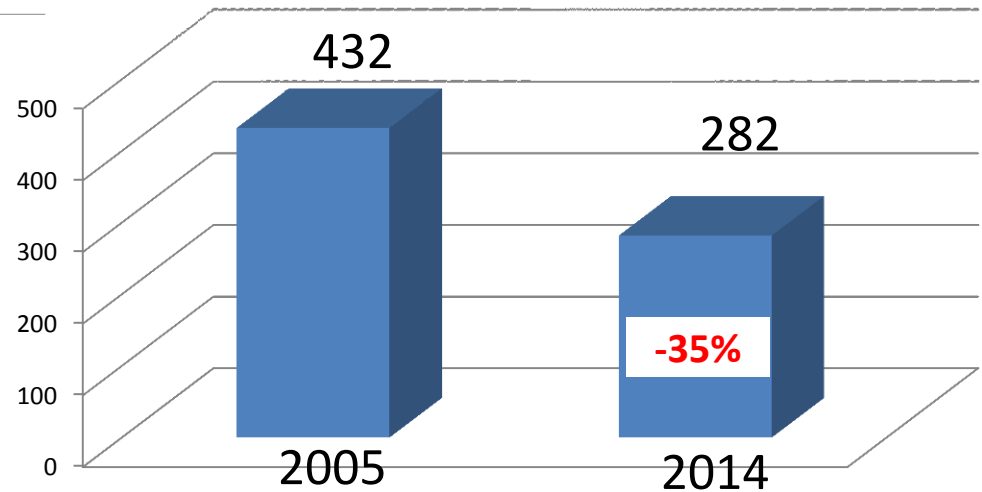
\$5,300,000



\$2,934,849

-44.6%

JPL F/T Staff



432

282

-35%

2005

2014

FIVE CRITICAL RECOMMENDATIONS

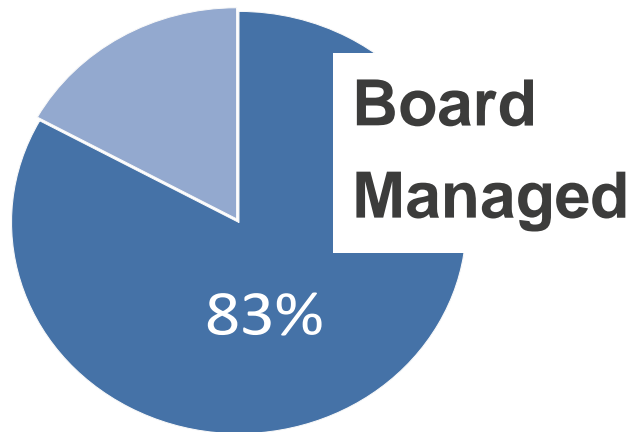
FOR THE FUTURE OF THE JACKSONVILLE PUBLIC LIBRARY



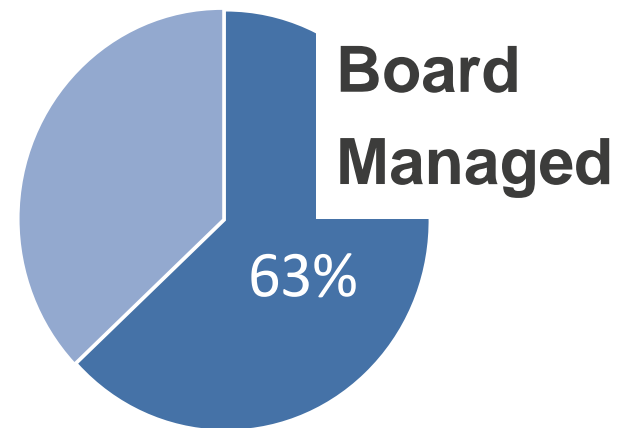
1. STRENGTHEN INFORMATION DELIVERY.
2. MAINTAIN BUILDINGS ADEQUATELY.
3. REMEDY INEQUITIES IN LIBRARY SERVICE.
4. STABILIZE FUNDING.
5. ENSURE FLEXIBILITY IN STAFFING.

THE INCREDIBLE SHRINKING BUDGET

FY 2005

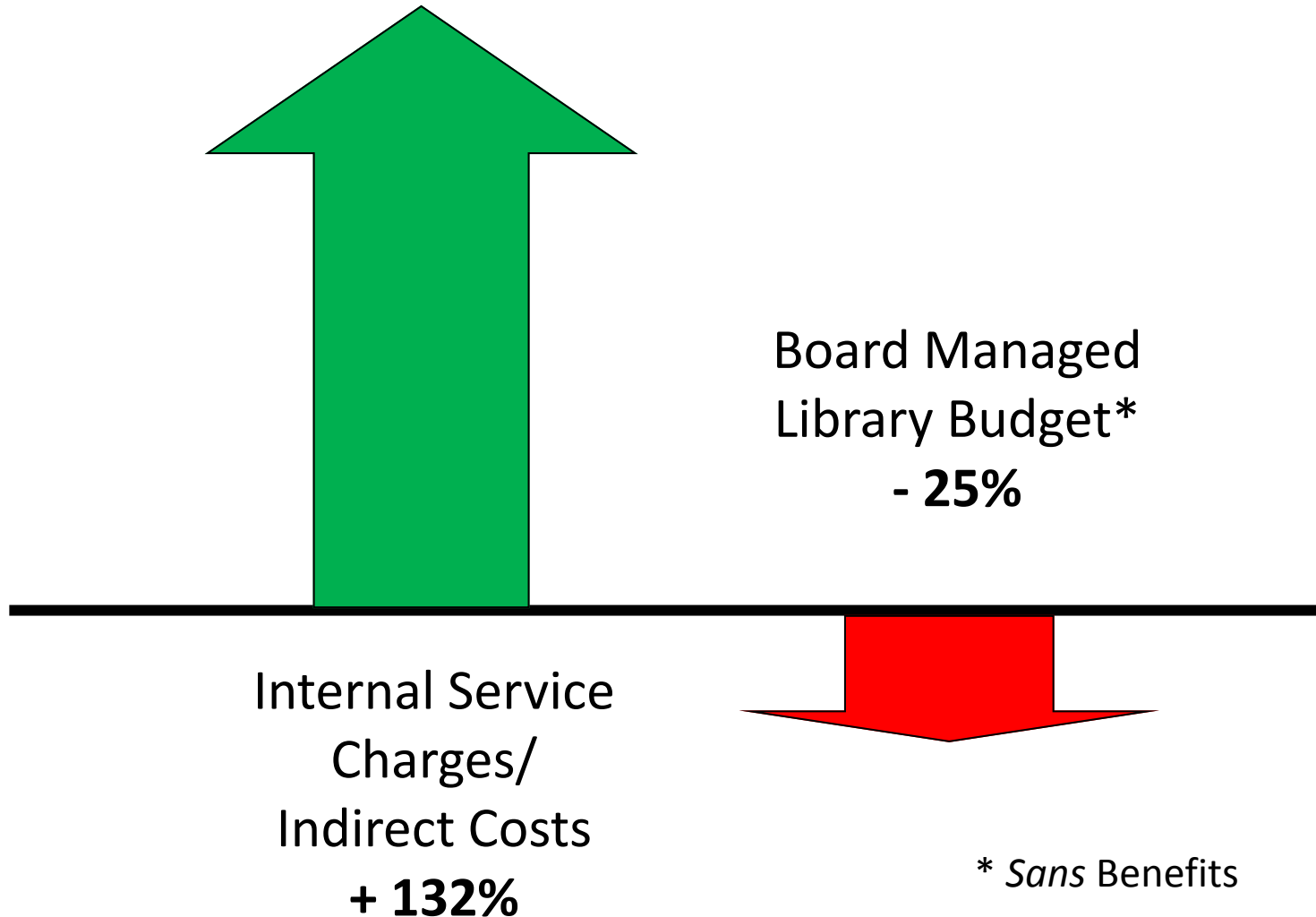


FY 2013



THE INCREDIBLE SHRINKING BUDGET

Change in Budget – 2005 to 2013



“SPECIALIZED NEEDS”

JPL SHOULD BE IN THE CLUB



- JSO
- JPA
- JAA
- JEA
- _____

“SPECIALIZED NEEDS”

JPL SHOULD BE IN THE CLUB



- JSO
- JPA
- JAA
- JEA
- JPL

Little to no input into ...

- Budgets
- Services Provided
- Planning for the Future
- Priorities

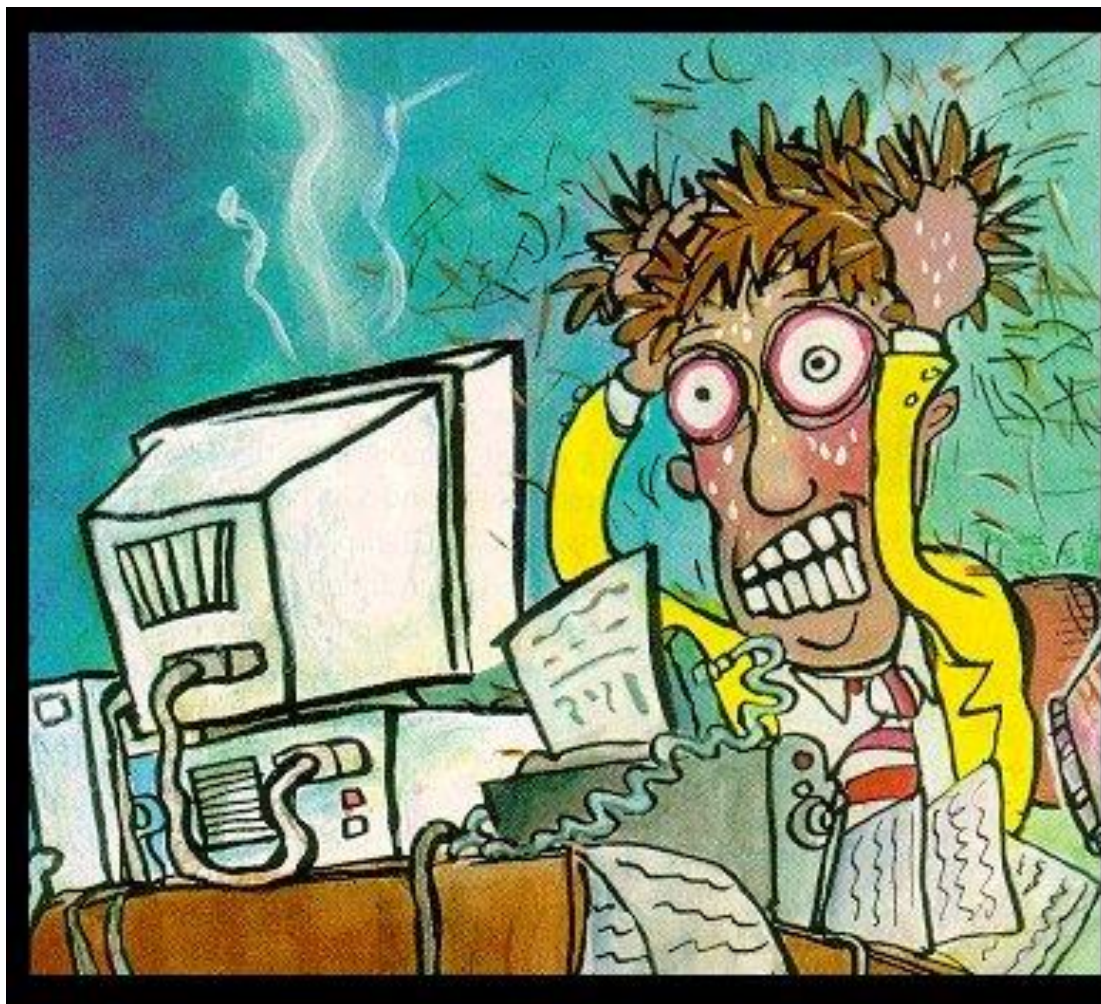
CAPACITY PLAN

CRITICAL ISSUE #1



Strengthen
Information
Delivery





CAPACITY PLAN

CRITICAL ISSUE #2



Maintain
Buildings
Adequately

OBSTACLES TO PLANNING



- No input into plans of centralized svcs.
- Unreliable budgets
- Politics
- No carry-over of funds
- No capital fund

CAPACITY PLAN

CRITICAL ISSUE #3



Remedy Inequities



CAPACITY PLAN

CRITICAL ISSUE #4



Stabilize
Funding

THE \$11.4 MILLION QUESTION

Start Here. Go Anywhere.



jaxpubliclibrary.org



facebook.com/jaxpubliclibrary



twitter.com/jaxlibrary



ilovejpl.com

**The Jacksonville Public Library's
Experience with Consolidated/Centralized Services**

Presentation to the Jacksonville City Council's Task Force on Consolidation
October 17, 2013

Preliminary Remarks

Thank you for the opportunity to present the library's perspective on the issues facing this task force. I would like to express appreciation specifically to City Council President Bill Gulliford and Councilmember Greg Anderson for their participation as ex officio members of the Board of Library Trustees, to Councilmember Lori Boyer, for your leadership in chairing this task force, to all of our trustees, who work diligently to provide thoughtful leadership of the policies and strategic planning of the library. In particular, I would like to thank trustee Guy Anderson, who has represented the library at most of the task force meetings.

The Big Picture: The Effect of Consolidated City-County Government on Library Service to the County's Residents

I understand that most of the Neighborhood representatives who spoke to you last week could not think of one benefit of consolidation for their neighborhoods. I would like to suggest one. Indisputably, all neighborhoods – especially suburban neighborhoods -- have significantly better library service than they would have, had consolidation not occurred.

And while the three beaches city managers were proud of the quality of service they are able to provide their residents as independent cities, I venture to speculate that not one of them would be eager to trade their participation in the Jacksonville Public Library system for the opportunity to provide their own library service. Every card holder in Duval County has access to literally millions of books, movies, music CDs and online products. And, to give just one more example of many of the benefits of consolidated library service, if you read the front page of this week's Sunday paper, you saw that Jacksonville library cardholders, unlike any others on the first coast, will soon have access to a video and music streaming service called Hoopla, as well, thanks to the purchasing power gained by being part a large consolidated city.

Has consolidation been good for library services for residents in Duval County since 1968? Unreservedly yes. However, the answer to the question – “Has it been beneficial to ensuring a library system capable of responding to today's rapid pace of change?” – is very mixed or negative.

Questions Posed by the Task Force

Yesterday afternoon we received the set of questions that you would like to hear addressed today.

Most of the questions fit nicely into the larger picture that I want to paint for you this morning of the library's experience with consolidated City government.

First, though, I will address four of your questions separately:

Governance. First, you asked about our Board and its role. The Board of Library Trustees is composed of 12 volunteers who serve as the policy and planning body for the Jacksonville Public Library system. Trustees are appointed by the Mayor of Jacksonville and confirmed by the City Council. Each trustee serves a four year term and may serve a total of two consecutive terms. The board also includes at least two non-voting members who serve in an ex officio capacity. These include a representative from the Duval County Public Schools, as well as one or two members of the City Council.

This arrangement is similar to some of the other departments, such as the Jacksonville Children's Commission and the Human Rights Commission and allows for important citizen input into library policy. However, the mayor (with the approval of the City Council) has complete control in determining our budget allocation.

Second, you asked about the **Budget Process.**

- Beginning in November or December of each year, the library administration begins reviewing the current budget and planning for the next fiscal year. The Board has a work day each spring that includes consideration of the library's future and budget.
- Sometime in March, the mayor's administration gives us a budget number for the portion of the budget that the Board manages, and asks us to prepare a budget that does not exceed that number. The staff, under the general direction of the Board, prepares a budget, which the Board must approve before it is submitted to the mayor by a deadline in April.
- One of the challenges is the number of revisions of that budget before it is submitted to the Council. In 2010, for example, we wrote six different budgets for FY 2011.
- In August, the library appears before the City Council Finance Committee to answer questions about the budget and to propose any changes.

- As you probably are well aware, it is often not until the last Council meeting in September that the library knows whether or not it will be closing branches, reducing hours, or making other significant changes, which must take effect at the beginning of the new Fiscal Year on October 1.

Thoughtful long-term planning does not fit well into this process. I will comment further on this process later in my presentation when I discuss obstacles to long-range planning. For now I would like to move on to ...

A third question you asked, about **Other Funding Options**. This past year, for the first time, the Main Library Conference Center operated independently of General Fund contributions, generating enough revenue to cover all expenses. This shows that when the library has an opportunity to be entrepreneurial, it is able to compete successfully with private enterprise.

While the library collects late fees and charges customers for lost or damaged books (we collected just under \$1 Million this year), the funds go back to the general city revenue account. Overall, the library has no incentive to generate other revenue or to be entrepreneurial because we are not permitted to retain the funds that are generated.

The Federal E-rate Discount program is another example of a potential funding support. The Federal government offers discounts to libraries for internet bandwidth and telecommunications services. For years, the city left millions of dollars on the table because of non-compliant contracts. Constant library pressure to change this finally achieved results, and the city now qualifies for the discount. Regrettably, though, ITD kept the discount in its own budget and libraries have seen little to no improvement in bandwidth since we began receiving it.

We are fortunate enough to have a Library Foundation, a private nonprofit organization that raises funds on behalf of the library. While for the last three years it has not been active, the Foundation recently hired a new executive director and will soon be actively raising money. The funds raised by the Foundation are only for enhancements to the library and not permitted to be used for basic day-to-day operations (such as to make up a funding shortfall).

Coordination/Integration. A fourth question you asked us to address was about coordination and integration with other tax-funded departments such as the School Board and other City departments. Ms. Mohan and I meet regularly and our head of facilities meets regularly with Public Buildings. But under the current administration there has been no liaison for the library (until the appointment of Paul Martinez last month) or meetings with other department heads which makes coordination of activities difficult.

However, we do have a close partnership with the Jacksonville Children's Commission and the Duval County Public Schools. As I mentioned earlier, a member of the DCPS administration serves as an ex officio trustee on our Board. Of many collaborations I could name, I will mention our partnership on the new Parent Academy, for which JPL serves as a host site, as well as offers sessions; and we provide field trip opportunities as part of the school system's major STEAM Passport initiative, which encourages children's development in science, technology, engineering, the arts and mathematics.

Central Services

I'd like to spend the rest of my time this morning taking a broader view of this question: *On balance, are Centralized Services a benefit or detriment to the Library?*

JCCI Study Recommendation: Independence for the Library. To introduce my response, I would like to call your attention to a JCCI Community Inquiry that concluded, in June of last year, that the current funding and governance relationship of the Jacksonville Public Library to the City of Jacksonville was degrading the ability of the library to serve the public. The recommendation of that study was the establishment of an independent taxing district for the library similar to such districts in Florida and across the United States. Volunteer library supporters are close to gathering the number of petitions needed to put this issue on a straw ballot when we hold elections in 2014. They turned in another 4,000 petitions to the Supervisor of Elections office yesterday.

2011 Capacity Plan: Five Critical Recommendations. Why has there been so much support for an independent taxing district, a goal that must seem quixotic to many? The short answer is that many library supporters, including the Board of Library Trustees, have become convinced that keeping the library bound to the city government – including its centralized services – was significantly handicapping its ability to serve this community. For a longer answer, I would refer you to a set of recommendations made by the Board of Library Trustees as

the outgrowth of a Capacity Plan completed for the library system in 2011. This report is a strategic plan which assessed the capacity of the library to serve our community. Five key recommendations rising out of the plan have been shared with the mayor and members of his administration and with the members of the City Council.

Each of the five recommendations addresses a critical shortcoming of the library's dependence on the City Government apparatus. Taken together, they describe a library system in a straitjacket, held back from being as efficient, effective and innovative as Jacksonville residents deserve – with funding for the delivery of library services declining every year for the last nine years.

- Funding for the library materials budget has reduced from \$5.3 Million in 2005 to \$2.9 Million in FY '14, a 45% reduction
- Full-time staffing levels have been reduced from 432 positions to 282, a 35% reduction (See chart, Slide #9)
- Hours were reduced by 22% just last year.
- These cuts began in 2006, before the recession began.

The first two recommendations growing out of the Capacity Plan highlight the failing of Centralized Services to be responsive to the needs of the Jacksonville Public Library so I will focus my attention there.

Background on Central Services and the Library. To give some background, as you may know, operating today, the library manages only a portion of its budget, while the rest – and a growing proportion – is completely under the control of the various Central Service Departments.

The library participates in virtually all of the city's centralized services: legal, IT, procurement, fleet management, human resources, copy services, janitorial, building maintenance, etc. *These relationships are not optional for the library.* As any other city department, we are obliged to use them. In fact, the city seeks to prevent dependent departments from encroaching on the roles of centralized departments, in part by prohibiting the hiring of staff with job classifications exclusive to a centralized department. The library, for example, could not hire anyone with a civil service classification requiring an IT background through normal channels, despite information technology being critical to library services.

That portion of the library budget that is controlled by Central Services is growing. In 2005, the Board managed 83% of the library's annual budget; by 2013

that amount had shrunk to 63%. As I mentioned, the segment of the budget which actually provides library services – staff, materials, the integrated library system, management of meeting rooms and computer services – has been cut year over year while centralized service costs have almost doubled since 2005.

So point number one on Centralized Services is this: They are consuming more and more of the library's budget, leaving the board and library administration control over a decreasing portion of the budget, the part that actually *delivers library services*.

Let me try and explain why this is such a problem.

“Specialized Needs.” Many of the agencies who have addressed this Task Force have appealed to their “specialized needs,” for which they should be exempted from Centralization; representatives of the Sheriff's Office, the Port Authority, the Jacksonville Aviation Authority, and JEA *all* made this appeal in their presentations to you. At your September 5 meeting, Kerri Stewart described some “super users” who may have very specialized needs that the central service operations have trouble recognizing or serving. “Perhaps the rigid centralization of all services may not work for everyone,” she said.

I couldn't have put it better myself. None of these agencies want to be forced into a “one size fits all” system. JPL is one of those organizations that needs more flexibility and management authority over delivery of its services.

The reason is this: With Centralized Services, the departments dependent on them have little input into centralized budgets, into the services that are provided, into planning for the future, into priorities.

Capacity Plan Recommendation #1: Strengthen Information Delivery. The effect of this arrangement can be illustrated by the number one critical issue in the Capacity Plan report. The first recommendation the Board made based on the Capacity Plan was that the library be allowed to manage its own IT.

More than any other city department, information technology is fundamental to our service to the community. Increasingly, our product *is* information technology in one form or another, and yet we are increasingly hamstrung in our efforts to provide customers the service, the access and the convenience they need.

To illustrate: The library has sought to give customers the ability to pay bills online since 2006. This project was delayed for years by ITD. Finally, this year we gave up on IT, and the library will pay for a platform and ongoing maintenance fees – from its *own* budget -- to make this possible. Other public libraries have been providing such a service for 10 years or more.

I could cite many other examples, such as website redesign and a library app for mobile devices – all with the same story – delay after delay after delay. Library services are not a priority for IT so our needs are not met. I give credit to Usha Mohan, who has been more responsive than previous heads of IT, but, even so, her priorities are not the library's priorities.

In an earlier task force meeting, Councilmember Boyer recognized the ability of independent authorities to be nimble, to act quickly to respond to needs. The world of libraries is changing rapidly and to remain relevant, JPL must have that kind of responsiveness. In the current system the library is anything but nimble.

Response by Crisis. There is a tendency of centralized departments to respond by crisis rather than by planning. As far back as 2006, JPL began reporting to ITD complaint after complaint from the public about inadequate number of computers, broken computers, painfully slow computers. The problem was finally addressed *five years later* in 2011, though not in time to avoid an 11% decline in the number of public computer sessions, as many customers gave up on using library computers in frustration. This was at a time when most other libraries throughout the country were seeing *increases* in usage.

Several years ago the library learned that four libraries did not have a fiber connection to the Internet: Regency, University Park, Highlands, and Westbrook.

- In FY 11 *the library* paid for the upgrade at Regency
- In FY 12, ITD funded the upgrade of University Park
- In FY 14, Westbrook and Highlands are still waiting.

The Highlands Branch Library has been at a crisis point for months because it still has only a 4 Megabit copper connection to the internet. Other branches are beginning to max out their bandwidth allotment, as well. Yet the library's hands are tied when it comes to solving these problems.

Capacity Plan Recommendation #2: Maintain Buildings Adequately. Similar issues have hampered the library's ability to provide the community with well-maintained and highly functional facilities. In their Capacity Plan study,

Godfrey's Associates estimated in 2010 approximately \$8.3 million in needed repairs.¹ We have asked Public Works for a maintenance schedule and annual budget so we can hear when repairs and upgrades are planned, among other things, to enable us to handle customer complaints accordingly. None has been forthcoming.

It is the same story with Public Works as with ITD: no budget, no planning, no input into priorities. The library shares the frustrations of Sheriff Rutherford, Supervisor of Elections Jerry Holland, and others from whom you have heard regarding the undefined charges for internal services.

When Council President Gulliford spoke to you, he gave the illustration of JEA saving money by contracting outside the city for their own vehicle maintenance. The ordinance he suggested as a means of introducing competitive pressure on pricing is an appealing one – to authorize departments to purchase services outside of city operations.

To implement such a plan of course would mean departments would have to actually *have budgets that show how much each service was costing*. This is something we do not have currently.

We support and commend Usha Mohan's efforts to implement "a cost model that accurately reflects JPL's true IT costs," but we still receive no budget from either IT or Public Works; no maintenance plan, no knowledge of which projects they will attend to or in what order and no input into their priorities.

Public Works and ITD exercise complete control over the department budgets assigned to them. The departments' role is one of supplicant. The decisions of the central departments are final. There is no obligation to explain the rationale for decisions; no process for appeal if we disagree.

Obstacles to Planning. The library does engage earnestly in strategic planning.

- In 2006, we developed a strategic plan called *DESTINATION:next*, with extensive community input and community leadership.
- In 2011, we completed the Capacity Plan, another kind of strategic plan, again with community input.

¹See Appendix 10 of the capacity plan report for a detailed breakdown of all recommended repairs (<http://jpl.coj.net/lib/capacity-plan-final-report.html>).

- And we have just completed an update of *DESTINATION:next* with goals to carry us through 2017.

Despite these obvious efforts at long-range planning, it is extremely difficult to coordinate our plans and goals to those of the city. We have no meetings to talk about the library's strategic goals and the role IT and Public Works should play in helping us meet those goals or in determining where our projects fit on their timetable and within their priorities.

Centralized Services represents only one of the obstacles to effective long-range planning. This was one of the specific questions posed by the task force, so I would like to take a moment to bring together a few of the other obstacles:

- One is simply the vulnerability of the budget to significant changes from year to year and the very short time frame – sometimes only a few days – between the time the library knows what its budget will be and the time it needs to implement it. In this budget cycle, with the annual uncertainty, and the last-minute decisions, any plans beyond the next September 30 are preliminary at best.
- Second, is the occasional conflict between good politics and good policy. This Task Force discussed earlier the “difficult balancing act” of independent boards, which are “supposed to be independent and non-political, but then criticized if their decisions don't align w/ the visions of elected officials...” To illustrate this point, compare the political difficulty of closing an inefficient library to the political ease of cutting the materials budget, which has been such an easy perennial target that it is now barely more than half what it was in 2005.
- An additional challenge for planning is the lack of ability to retain unspent funds for the next year. In his presentation on Sep. 19, Sheriff Rutherford called attention to the frustrations of “budgetary cost savings that have gotten swept back into the General Fund balance at year-end to help balance the rest of the City's budget.” When the economic downturn hit several years ago, *independent* library systems were able to anticipate the drop in funds to come and make immediate cuts and put projects on hold in order to generate savings to mitigate the impact of the budget cuts that they knew were coming. The library has no capacity to do anything like this because any unspent funds at the end of the year are turned over to the general fund. Many of these independent libraries also make a practice

of setting aside money in reserve in the prosperous times in order to mitigate the impact of the lean times – another option we do not have.

Capacity Plan Recommendation #3: Remedy Inequities in Library Service and #4: Stabilize Funding. Finally, I would like to touch on two other critical issues identified in the Capacity Plan. The urban core libraries, most more than 40 years old, are the least functional in the system, with the most intractable problems. As part of BJP, wealthier suburban neighborhoods got state of the art facilities. In many respects consolidation did not benefit the delivery of library services to the inner city as little was done to address the small and inadequate facilities. In addition, nothing has been done to provide full library service to the far north side. In response, the board recommended establishing a new, state of the art, library in the urban core and another in the northeast.

However, under centralized services the library has no clear mechanism to move either of these recommendations forward. No capital improvement funds are available to the library and while we have put the “Oceanway Library” in our Capital Improvement Plan (CIP) request every year since 2006 there has been no serious discussion with anyone as to how this could be planned for and financed. The library has no seat at the table when it comes to decisions about the CIP and no mechanism to “save” funds to place in a capital budget for major expenditures for equipment.

I mentioned earlier that the revenue we collect in fines and fees is returned to the general city fund. Critical Issue #4 included a recommendation to address the absence of a capital fund by establishing a *Library for the Future Fund* where such library revenues could be deposited. This fund would not be large enough for capital projects like new buildings, but for more modest capital improvements, it would fill a great need.

Conclusion

Let me be clear: These problems span administrations. They are endemic, in part due to the way the system is structured and in part to the culture in which we operate – all made more pronounced, of course, by the challenging budgetary times the City has endured.

The bottom line question for Centralized Services is: If the city wrote the library a check for \$11.4 Million – the amount we are currently charged in indirect costs and internal service allocations -- could we provide more value for

these funds? We are convinced that we could. Our studies of peer libraries indicate they are able to get much greater bang for their buck for some of those major services. There is no reason we should not be able to be at least as efficient as our peers.

The library is indeed the beneficiary of economies of scale derived from being part of a much larger organization. We benefit from a centralized contract for desktop computer support; we are pleased to store our data on IT servers and contribute to its cost; we are presently satisfied with the city-wide security and custodial contracts; we enjoy the benefits of volume purchasing. If given a choice, we would choose to take advantage of many quality services and economies of scale offered by Centralized Departments.

But how wonderful it would be to have a choice -- to be able to redesign our website if that is a priority, to budget for our own priorities, to increase the bandwidth at struggling libraries, to implement a maintenance plan for all facilities.

If a budget ran short, which it no doubt would, then we would have the ability to weigh our priorities, and make decisions about where and what to cut in order to do the things that matter most. The ability to make those decisions, based on our intimate knowledge of library service and attentiveness to the needs of our customers, is completely out of our hands in the current system. In order to provide quality library service efficiently in the 21st Century, it is an ability the Jacksonville Public Library clearly needs.