

## Section 8: Moving Forward

Thomas L. Friedman's op ed in the *New York Times*<sup>1</sup> references William Gibson's<sup>2</sup> line, "The future is already here, it's just not evenly distributed." Friedman asserts that the future is here and the distribution has started. One example is 5G, the fifth-generation wireless system. This new technology has significant implications for the "education-to-work pipeline," an old model that was divided into three life time periods – education first, then work for 40 years, then retire. We next thought it would be this – education, work for 20 years, get retrained, work 20 more years, and retire. That second model is fast disappearing, replaced with a third model – "continuous lifelong learning, because when change is accelerating, the fastest-growing companies and most resilient workers will be those who learn faster than their competition."<sup>3</sup>

**The New Age: The Future.** The public library can be – indeed must be – a player in this third model. It can and must be a place that offers a rich collection of resources of all kinds and types – staff, programs, classes, collections, state-of-the-art technology, extended hours of operation, and a minimum of roadblocks to access. The Santa Fe Public Library can be such a place.

<sup>1</sup> Friedman, Thomas L. "New Age Starts in 2020," *Times Digest*, December 5, 2018, p.8.

<sup>2</sup> William Gibson is an American-Canadian fiction writer widely credited with creating a subgenre of science fiction in a futuristic setting that focuses on a combination of lowlife and high tech, featuring advanced technological and scientific achievements such as artificial intelligence and cybernetics, juxtaposed with a degree of radical change or breakdown in the social order.

<sup>3</sup> Friedman, op ed.

### Strategic Priorities for Community Needs & Library Improvements

The contents of this Section are a synthesis of community needs, customer wants, City government goals, and library best practices to create recommendations that form a 21<sup>st</sup> Century Plan for a sustainable Library system. The intended outcome is a Plan that helps leverage resources throughout the greater Santa Fe area via existing channels and viable new partnerships.

To this end, Library stakeholders and the Consultants focused on establishing strategic priorities, and corresponding goals and objectives – intended to meet the most urgent needs of the Santa Fe community – as found in the assessment of existing conditions and documented in Section 7 of this Report.

The Consultants sought information from the Library Board, the Steering Committee, and other Library Stakeholders in attendance concerning answers to each of these five questions – with answers to each question prioritized by most important to lesser importance:

1. What should a Strategic Plan for the Santa Fe Public Library entail?
2. What are important needs of the greater Santa Fe community?
3. What are the strengths of the Santa Fe Public Library?
4. What improvements could be made at the Santa Fe Public Library?
5. What is the Vision for the Santa Fe Public Library in the near future (the next two to five years)?

The Consultants documented all responses, identifying consistent themes, and grouping responses into 17 categories of goals. These goals, listed in priority order as determined by the participants of the Strategic Planning process, were:

#### 1 Outreach

Must be a priority service.

1. Staffing – hire community experts, not necessarily librarians, use volunteers from communities, as possible.
2. Internships – Knowledge River, U of Arizona program for Native American and Latino librarians.
3. Marketing – need language skills, expertise in the field.
4. Go into the community – people to people/language skills, pop-up library, target females.
5. Explore partnerships – other city and organizations marketing programs.

## 2 Library Locations

How many, where, when?

1. Midtown – La Farge vs. SFUAD, main library SFUAD new building or renovate Fogelson.
2. Downtown – library equity with focus on culture/history/art/teens/etc., 24/7 operation.
3. Southside – increase visibility with a big sign, refine FF&E to be more user-friendly.
4. Accessibility – hours open, barrier free, parking, transit, bikeable, walkable.
5. Directional signage – add signs throughout all neighborhoods.

## 3 Education

Early childhood, GED, Literacy.

1. Early childhood education – parental guide, newborn book/library card, traditional
2. GED support – provide on-site tutors/testing
3. Promote literacy, all types, all ages – reading/writing/digital, collaborative programs
4. Provide STREAM programming – coding, robotics, artificial intelligence
5. Explore partnerships – schools/centers, GED accrediting agency, tech companies as advisors
6. Funding – new influx of funds by Legislature/Governor

## 4 Technology

Important for Library operations and as a tool.

1. Infused into everything – add Spanish and Native language media sources.
2. Control your own destiny – website, expert staff, apps, and social media.
3. Customer experience.
4. Automation – material handling systems, room reservations, kiosk with open access 24/7.

## 5 Staffing

A 21<sup>st</sup> century library must have adequate staff.

1. Hiring – position, quantity, skills, desire, flexible job descriptions, recruit language skills.

2. Development – cross-training, culturally competent with experience, courses, and training.
3. Retention – career path, compensation.
4. “Fast, focused, flexible and friendly.”
5. Hire by contract, if skills are not available. Start volunteer/intern programs with stipends from the Friends.

## 6 Affordable Housing

Supportive, perhaps deposit collections.

1. Up-to-date database of resources – online and in print.
2. Explore partnerships – clearinghouse to disseminate each other's information, resources.

## 7 Marketing

Absolutely critical for 21<sup>st</sup> Century Library.

1. Staffing – contract service? multilingual, multicultural
2. Multicultural outreach – multiple languages, cultural media

## 8 Multi-Cultural

Necessary regard to Library staffing and service.

1. Infused into everything – policies, services, programs.
2. Staffing – cultural competency, language skills beyond English.
3. Marketing – use Spanish language and Native media.
4. Collections – non-English emphasis to improve cultural and other languages.
5. Programs – emphasis on cultures.
6. Explore partnerships – museums, artists, cultural organizations.

## 9 Collections

SFPL cannot be viable public library without strong collections.

1. Weeding – right-sizing the collections, make room for new cultural/other language materials.
2. Policies – collection development, accepting donations, City: Friends ability to acquire books.
3. Collection development – outsource to deliver materials shelf-ready/quickly accessible.

4. Shelving – lower shelves/wider aisles for more user-friendly access, movable shelving.
5. Multilingual signage – wayfinding, consistent format and content system-wide, image-based.

**10 Internal Communications**

Good communication is key to good marketing by unifying the SFPL message.

1. Remove barriers – regular staff meetings up and down the line, Director accessible to anyone.
2. Encourage cross-pollination – staff activities, potlucks, holiday projects in the community.
3. Employ tools that foster better dissemination of data – make it easy to work together.

**11 Employment Support**

Important to have valid and supportive data.

1. Support small business – Librarians love working with adults, outreach to businesses
2. Job skills training – resume writing and videos, interview skills, college courses provided at the Library

**12 Efficiency**

Every policy/procedure examined for relevant and need.

1. Policies and procedures – best practices versus the ways things have always been done, e.g. holds.
2. Best practices lead to better practices that are customized to the community and local neighborhoods.
3. Administration – accessible, open to informal conversation.
4. Communication – internal and external, informal, official, often, use food as a draw.

**13 Entrepreneurial Support**

Increase wages by supporting small business locally.

1. Entrepreneurial incubation – participate in Libraries as launch pads to foster innovation/startups.
2. Explore partnerships – Community College/teachers, City departments.

**14 Registered Cardholders**

Important to have validated supportive data.

1. Every 3<sup>rd</sup> grader gets a card – every K-12 student gets a card, re-register past cardholders.
2. Family activities – schools, parks, recreation, museums.
3. Up-to-date database for statistical analysis and performance measurements.

**15 Social Services**

Can have an “always” up-to-date database.

1. Up-to-date database of resources – online and print, courtesy of Santa Fe Public Library, grants?
2. Explore partnerships – use experts to deliver services at the library.

**16 Funding Sources**

Always a priority, ever seeking funds.

1. Equitable County participation.
2. Investigate other potential sources – library district, tax measure is opportunity for financial stability.

**17 Teens**

Santa Fe’s most at risk population.

1. Facility upgrades of teen spaces – with a wow factor, social place, and performance space.
2. Homework help – online, in-person, cooperate with school librarians.
3. Partnerships – Police/Boys and Girls Club, Teen Center, Schools, and Parks and Recreation.
4. Teen Councils – as experts to develop own spaces, services, filmmaking/animation digital lab.

Santa Fe Public Library serves a unique city of cultures and languages and histories, so its direction should have a multicultural and multilingual focus integrated throughout the Library's programs, services, and policies. The Library should mirror the culture and history that make it a destination for tourists and residents alike. Paraphrasing one SFPL staff member: ‘The Library currently resembles a 20th century public library that could be located anywhere.’ So the premises of the improvements sought in this Plan for a 21<sup>st</sup> Century Library System are to:

- Recognize the demographics of the City and County.
- Infuse multi-cultural and multi-lingual into all aspects of the Library system.
- Recruit and develop community-minded staff at all levels.
- Partner with experts to expand the Library's reach, as well as to share Library resources. As an example, school partnerships should include the Santa Fe Indian School.

### Strategic Priorities

The overarching goal of this Plan for a 21<sup>st</sup> Century Library for Santa Fe is to develop a strategic direction that will help ensure that SFPL has the right tools, resources, organizational structure, and facilities. These components are needed to support sustainable library operations and outcomes that continually impact the greater Santa Fe community in a positive way.

**Library Services Reinforce City Goals.** In 2017 and 2018, the City of Santa Fe developed and adopted results-based accountability (RBA) as a framework for planning and action needed to improve outcomes for the Santa Fe community. Consistent with the RBA approach, the City focused on identifying 1) the specific quality of life ambitions and population level results they intend to target across the City; 2) the contributions each unit or department can make in improving those population results; and 3) the performance measures the City will focus on to guide the ongoing practice of performance improvement and measurement of success of their programs and services.

The following portion of this Library Plan outlines the quality of life ambitions and population-level indicators adopted as a working list by the City Council in 2017. It also delineates performance measures identified by each unit of City government, in order to help staff understand how much did they do, how well did they do it, and did they make a difference as a result of their efforts. Each unit identified their primary performance measures as a starting point to evaluate progress and improve effectiveness.

The City will gauge success using the following performance measures:

- Percentage of Divisions/Units who've identified primary performance measures using RBA framework – with a focus on measures that help staff understand how well they are doing and whether anyone is better off or if they made a difference as a result of their efforts.
- Percentage of Divisions/Units who have collected baseline data on primary performance measures.

- Percentage of Divisions/Units who are using RBA Turn the Curve framework to improve performance and efficiencies.
- Percentage of RBA Division/Unit leaders who report they have the support they need to use RBA to improve performance and efficiencies.
- Number and percentage of Divisions/Units that report progress on customer/program results.

**Quality of Life Ambitions & Population Indicators.** The original working list of ambitions and indicators adopted by the City Council in 2017 included seven Ambitions, each with four to five quantifiable indicators. Several of the indicators were based on the most recent National Citizen Survey (NCS ) questions from the survey of Santa FE residents conducted in 2017. Survey results are posted at this web link:

[https://www.santafenm.gov/media/archive\\_center/The\\_NCS\\_Community\\_Livability\\_Report - Santa\\_Fe\\_FINAL\\_2017.pdf](https://www.santafenm.gov/media/archive_center/The_NCS_Community_Livability_Report_-_Santa_Fe_FINAL_2017.pdf)

Of the seven Quality of Life Ambitions, four resonated with the Consultants as being particularly congruent with the Santa Fe Public Library's Mission and activities. These four Ambitions, and their Population Indicators, are:

#### **Santa Fe's Economy is Diverse & Prosperous**

- Employment rate.
- Business starts/ closings.
- Percentage of people that rate employment opportunities as Good or Excellent (NCS question).
- Percentage of people that rate overall quality of business and service establishments as Good or Excellent (NCS question).

#### **People in Santa Fe Achieve Their Full Potential**

- Percentage of people that rate availability of quality child care/preschool as Good or Excellent (NCS question).
- Percentage of people that rate K12 education as Good or Excellent (NCS question).
- Percentage of people that rate adult educational opportunities as Good or Excellent (NCS question).
- Percentage of people that rate opportunities to attend cultural/ arts/music activities as Good or Excellent (NCS).

#### **Santa Fe is a Great Place to Live, Work & Play**

- Percentage of people that rate Santa Fe as a Good or Excellent place to live (NCS question).

- Percentage of people that rate Santa Fe as a Good or Excellent place to raise children (NCS question).
- Percentage of people that rate Santa Fe as a Good or Excellent place to work (NCS question).
- Percentage of people that rate Santa Fe as a Good or Excellent place to visit (NCS question).
- Percentage of people that rate Santa Fe as a Good or Excellent place to retire.

**Santa Fe has a Fair, Just & Equitable Society**

- Percentage of people who rate opportunities to participate in community matters as Good or Excellent (NCS question).
- Percentage of people who rate openness and acceptance of community toward people of diverse backgrounds as Good or Excellent (NCS question).
- Percentage of people who rate availability of affordable housing as Good or Excellent (NCS question).
- Percentage of people who rate availability of affordable quality food as Good or Excellent (NCS question).
- Percentage of people who rate availability of affordable quality mental/preventative health care as Good or Excellent (NCS question).

**Santa Fe Public Library Unit Performance Measures.** As a crucial step in the RBA process, SFPL staff collaborated to conceive and codify 23 primary and secondary performance measures for the Library system. Participants who helped develop these unit performance measures included the Library Director, Library Managers, and staff representing Circulation, Reference, and Children's. Each of these measures are listed in Section 9: Action Plan, as they apply to measuring various goals and objectives.

With this framework in hand, the Consultants recommend that the Library staff and Board members move forward with developing strategic direction that feed into Community Services Department Goals and Objectives.

**LIBRARIES CHANGE LIVES**

**THE CHANGING ROLE OF PUBLIC LIBRARIES**  
INFORMATION, SKILLS AND KNOWLEDGE

LIBRARIES HELP PEOPLE OF ALL AGES LEARN TO LOVE READING

WE EVEN HELP THEM GET USED TO NEW WAYS OF DOING IT

WITHOUT LIBRARIES THERE WOULD BE FEWER PEOPLE BUYING AND ENJOYING BOOKS

4.2M PEOPLE USED THE INTERNET FOR THE FIRST TIME IN A LIBRARY

OVER 24M PEOPLE PARTICIPATE IN NON-FORMAL AND INFORMAL LEARNING ACTIVITIES

OVER 65 000 PUBLIC LIBRARIES IN THE EU WELCOMING OVER 100 MILLION PEOPLE EVERY YEAR

WE ARE INFORMATION PROFESSIONALS - WE RESPECT COPYRIGHT

OH... AND LIBRARIES SPEND €4.2BN A YEAR ON CREATIVE CONTENT

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### Services & Programming

Today's public library must adapt over time. It cannot – it must not – stand still. It should be a prominent source of pride and inspiration, functioning as a community center and a valued destination for all. The local public library should be customer-oriented, equipped with systems that encourage both self-service and independent use.

The cost/benefit analyses that demonstrate the value of public library programs and services come from numerous return on investment (ROI) studies for public libraries, as previously discussed in prior Sections.

Increasingly, it is less about the resources that libraries offer their communities, but rather how libraries combine their resources, services, space, outreach, and expertise to resolve and meet community challenges in the areas of early childhood and lifelong education, workforce development, small business engagement, and various other articulated community needs.

The programs offered by the public library should facilitate public debate and community dialogue, as well as enjoyment and wellbeing. For example:

- Having various sized gathering spaces in each library of various sized audiences.
- “Hoteling” as a way SFPL could assist business startups seeking work space.
- Placing a library kiosk at a transit and/or employment center to add economic value, as substantiated by the low operational costs for unstaffed such library service outlets.
- Delivering services to senior centers so as to add that fast-growing segment of the population as library clientele.
- Providing programs that attract the 18 to 34 age group, the Millennials.

Sound, forward-thinking, and realistic library services will foster these attributes.

### Consultant Conclusions for Services

Several Findings and Conclusions related to feedback on existing and potential Library services from the community and customer analysis is documented in Sections 3, 4, and 7 of this Report. To recapitulate those issues and justification for action:

- SFPL is not serving all at-risk segments of the greater Santa Fe community per feedback from Community Engagement and Customer Analytics.

- Education attainment, home ownership, and children living in the home have traditionally been key indicators of public library usage.
- High school graduation rates are lower than desired among lower income households, and the lowest high school diploma attainment is found in the southern area of Santa Fe.
- The highest number of residents with college degree attainment live around downtown, followed closely by residents in midtown.
- More families with children in the home live on the south side.
- The south side area has the highest percentage of owner-occupied housing.
- Poverty rates are highest toward the south end of Santa Fe.
- A significant number of residents are fluent in languages other than English.
- Multilingual residents primarily speak Spanish and Native American dialects.
- There are a wide range of core Library customers who regularly use SFPL, as defined in Section 4, so no “one size fits all” approach is applicable.
- The two primary core customer segments that use all three existing Santa Fe Public Library locations are B09:Family Fun-tastic, households whose psychographics show they are upscale families with teens in the home; and H26: Progressive Potpourri, mature couples whose psychographics indicate they are bilingual, ethnically diverse, and are technology wizards.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

### Recommended Priorities for Services

Library services need to be conveniently accessible to all Santa Fe residents. Access begins with the hours each Library is open on a weekly basis.

**Hours of Operation.** Ideally, each SFPL location would be open the exact same hours as every other Library – and would open and close the same hour as many days as possible – thereby limiting customer confusion. Currently, the Main Library is open 60 hours per week, La Farge is open 58 hours, and Southside is open 57. Recommended good, better, and best options all have cost implications, potentially scheduled as follows:

- **Good is 62 hours per week:** 9 am to 9 pm Monday through Thursday, 9 am to 6 pm Friday, 10 am to 5 pm Saturday, 1 pm to 5 pm Sunday.
- **Better is 68 hours per week:** 9 am to 9 pm Monday through Thursday, 9 am to 5 pm Friday and Saturday, 1 pm to 5 pm Sunday.
- **Best would be 72 hours per week:** 9 am to 9 pm Monday through Thursday, 9 am to 6 pm Friday and Saturday, 12 noon to 6 pm Sunday.

Equality of access is an issue here, as is customer convenience of consistent hours system-wide. However, in order to optimize access to Library services system-wide, SFPL may want to adjust hours at each location to its demographics. Southside might be open later in the evenings, the Libraries located in midtown and downtown could open early and all day Sundays. The Consultants recommend a data driven analysis that will indicate what hours are needed at each Library based on use. Research should include: 1) a qualitative survey of customer preferences; and 2) a quantitative data analysis of visit count by each actual hour. This two-prong approach will compare and contrast what people say they will do with what they actually do.

It stands to reason that the cost implications for more hours are proportionate to the number of hours added. A simple way to conservatively estimate a cost impact is to take the total annual expenditures for staff salaries, wages, and benefits and divide that cost by the total hours the Library system was opened for an entire year – to determine the cost for SFPL to operate per hour. Based on SFPL statistics from 2018, it cost \$295.80 per hour open to operate the entire system. So in essence, this methodology assumes it takes a little bit of every staff position in the Library to be open, from the Library Director to part-time Library Technician. Therefore, in order to increase hours at Southside and La Farge from 57 and 58 hours per week to match the 60 hours the Main Library is open weekly,  $3 + 2 = 5$  additional hours multiplied by 52 weeks x \$295.80 per hour open = \$77,090, or a 3.0% increase in total annual expenditures.

One potential low-cost solution would be to make the total hours open at each location be consistent via before- and after-hours access when the buildings can be open but unstaffed.

**Outreach Services.** Outreach Services are typically defined as Library services that extend outside the library facility. Outreach services for people who are unable to come into the Library are programs that a for-profit corporation would be unlikely to offer, since they're based on human need rather than sales data. The public library plays a leading role in outreach efforts nationwide, with services for children, their caregivers, local schools, and students at the top of the list. Just as important are outreach offerings which bring library service to the under-served and un-served segments of the community. Public libraries are now incorporating mobile access and outreach into their strategic plans.

The Santa Fe Public Library system should have a strong presence in the community. The Library needs to educate the public about whom they are as an institution and who the Library is as individuals. They need the public to know what resources and services the Library system provides, and where each Library is located. The Consultants recommend initial areas of emphasis should be:

- Develop Outreach Services based on staff capabilities and the Library's strategic goals and objectives.
- Establish a list of targeted services.
- Seek and develop potentially viable partnerships with a variety of organizations in the greater Santa Fe area.
- Implement a multicultural approach to outreach, in order to reach residents for whom English is a second language.
- Get books in the hands of new parents through outreach to hospitals, medical clinics, pediatrician offices, and nurseries – critical to starting early childhood education.
- Outreach to all types of schools, to support the improvement of SFPL's currently robust Children's Services.
- Investigate off-site programming and pop-up library applications as vehicles to temporarily set up outreach activities where the target audience is comfortable.

**Multilingual Resources.** The Consultants recommend the Library infuse cultural competency and language skills into everything it does. The customer expectation should be that SFPL provides multicultural, multilinguistic library services with an external emphasis. Development and cross-training of staff members will be required. Recruit members with language skills, culturally competent with experience and/or through courses and training.

**Education Defined at Santa Fe Public Library.** The educational fabric Santa Fe Public Library, in partnership with others, should be via a program comprised of the following elements:

- **Self-Directed Education.** Use of a collection of library materials in print, audiovisual, and electronic formats plus access to online resources;
- **Research Assistance & Instruction.** Structured for both the individual and groups and will include research assistance, classes, seminars, and workshops for all ages; and
- **Engaging & Enlightening Experiences.** Meaningful events and partnerships that will include cultural and community center concepts.

These definitions apply to all current Libraries and any future buildings. Utilizing these three elements as the foundation for service, the Consultants recommend SFPL focus its efforts on broad subjects that stakeholders believe are keenly important to the Santa Fe community.

**Robust Children’s Services.** Continue to provide early literacy and grade school programming for children and their caregivers:

- Staff of professionals and non-professionals with bilingual skills;
- Child-centered design and décor;
- Continued development of strong collections of high quality print and non-print resources;
- Age-appropriate furniture and equipment including technology for learning and “Read Aloud” seating;
- Encouraging expectant mothers and fathers to read aloud to their unborn child and continue until the child is an accomplished reader;
- A variety of age-specific classes and learning activities for parents with infants to pre-teen years;
- Classes for extended families that address child development, reading skills, educational toys, and more;
- Consistent partnership with the Santa Fe Public Schools (SFPS) to include classes by the Library in the schools, and school trips to SFPL; and
- Developing sound relationships with Santa Fe’s home schooling community.

Outreach to day care centers, nurseries, medical offices, and public and private schools is also an extremely important component of Robust Children’s Services. The Consultants propose consideration be given to forming a small, rotating group of parents/grandparents who would act as both “sounding boards” and “suggesters” for Children’s Services. Additional objectives of this focus include:

- Sensory programming.
- Investigate off-site programming.
- Expanded programming for:
  - Family and intergenerational groups.
  - School-aged children and home schoolers.
  - STEM, STEAM, and STREAM programs.
- Investigate providing library cards to all Third Grade students.
- READY! for Kindergarten and/or similar reading platforms.

**Stronger Teens & Tweens Services.** The Consultants define this group of young people as ages 12 or 13 to 17 or 18 who are primarily, but not exclusively, enrolled in school. A stronger program of service will have a minimum staff of one or two Librarians/Library Assistants who relate to teens and tweens and who want to work with them. Teen/Tween services should include many of the same components described for Children’s Services – collections, space designed to “speak to” the age group, based on input from young people, furniture and equipment, programs, and a space for the creation of art and music and class visits. Formation of a Teen Advisory Board (TAB) comprised of a cross-section of Santa Fe youth that works with Library staff to design spaces and plan activities and programs is essential to the success of Teen Services. Additional objectives of this focus include:

- Investigate current needs of teens in Santa Fe.
- Establish a citywide Teen Advisory Board.
- Provide Teen programming in relevant formats.
- Develop viable Outreach throughout Santa Fe, potentially in partnership with the Santa Fe Police Department.

**Continued Adult Services with Increased Services for Older Customers.**

The adult community will continue to constitute the largest group of SFPL customers. In planning for this segment of the population, it will behoove the Library to consider the following demographic traits:

- Millennials<sup>4</sup>
- Generation Z<sup>5</sup> and
- 80 is the new 40.

A strong program of service for adults has many of the same ingredients as is proposed for children and teens/tweens – staffing, collections, technology, and classes. The distinguishing factors to consider include:

- Hours of service that consider both the traditional early rising habits of seniors and the to and from commuting schedule of many residents.
- Staff stationed at the front door to assist entering customers with their needs.

<sup>4</sup> See the 2019 Pew Research paper “Millennial life: how young adulthood compares with prior generations.”

<sup>5</sup> See “A to Z of GENERATION Z, The” Verelletto, Christine, *Library Journal*, August 2019, pp 26+ and “Five Things Libraries Need to Know About Emerging Adults,” Kagan, Oleg, *Public Libraries*, July/August 2019, pp 11+.

- Displays of materials that are current, eye-catching, and will help save time for customers in their selection of resources.
- Furniture that is comfortable and easy to get into and out of.
- Time constraints of busy individuals and households that can be helped with technologies such as self-check by smart phone, automated materials handling systems (AMHS), after-hours pickups of holds, and placement of 24/7 service kiosks at, for example, Rail Runner stations, grocery stores, etc.
- Other technology needs should include the following:
  - Loanable laptops and/or iPads available within the Libraries, and for checkout.
  - Public computers with connectivity to laser/color printers, scanners, email capability, and software including Word, Excel, and PowerPoint or equivalents.
  - High-end Mac computers for those who need the enhanced graphic capabilities.
  - Classes that go beyond the basics of computing, some regularly scheduled, others on an as-needed basis.

**Library Services for Senior Citizens.** There are evolving attitudes toward retirement and the desire to remain active as long as possible. The “senior citizens” of today – and tomorrow – will increasingly be seeking lifelong learning opportunities, book discussions, writers’ workshops, national issue forums, and much, much more. New communities for retirees are opening throughout the country, including New Mexico, at a rapid pace.

To address the concept that “80 is the new 40,” consider offering classes in health, exercise, and discussions of topics of interest that allow an exchange of ideas between participants and the presenter, and/or between those in attendance with each other.

The collections will benefit from an abundance of large type books and hearing aids in gathering spaces. Programs designed purely for entertainment should not be eliminated, but should comprise only a fraction of what SFPL has for Santa Fe’s senior population. Baby boomers are the fastest growing age group in the U.S. Currently 14.5% of the nation’s population is age 65+. By year 2029 the national population of those age 65+ will be 20%.<sup>6</sup> Additional objectives of this focus include:

<sup>6</sup> Elder Alliance, Inc. & James Madison University Social Work Department, 2019.

- Continue to provide and expand adult programming:
  - Entertainment/recreation.
  - Multicultural programming.
  - Conversation and storytelling programs.
  - Book clubs and Meet-ups.
- Expand multi-language large type fiction and nonfiction resources.
- Expand the collection of Spanish and Native language authors.
- Develop Outreach Services.

The Library should continue to be committed to Santa Fe’s growth and economic prosperity by achieving the objective of offering relevant adult education activities and programs at accessible locations.

**Workforce Development.** If commercial and non-profit organizations are to be successful over time, a common need for both is they must have good employees to provide the services and products their customer base needs. Santa Fe Public Library should be an important asset in assisting these organizations with their employee needs. The Consultants recommended that Workforce Development components of SFPL’s overall program of service be comprised of:

- Offer relevant adult education activities and programs accessible at each location:
  - Job skills.
  - Work skills training.
- Classes for individuals who need basic and advanced computer skills. Technology instruction to include:
  - Basic computer and application classes.
  - Coding.
  - Robotics.
  - Virtual Reality.
- Classes and/or personal assistance with completing job applications, resume preparation and interviewing, for both the interviewee and the interviewer.
- Classes and resources in awareness and use of online digital data and information, for the beginner and the experienced.
- English as a Second Language (ESL) classes.

- Distance learning for those enrolled in a distance learning course.<sup>7</sup>
- Preparation classes for taking and passing GED requirements.
- Space and equipment for learning about and working with various media formats – print, audio, and visual.

**Entrepreneurship & Small Business Support.** Santa Fe Public Library can assist Santa Fe’s small businesses and the entrepreneurial community in achieving success by providing:

- Study and Conference Rooms.
- Databases and software packages.
- Business plan examples.
- Informational programs.
- Resources for marketing materials.
- Mentoring seminars and one-on-one sessions via Partnerships.
- Audio-visual recording and editing equipment with staff assistance.
- One-on-one “Check-Out-A-Librarian” services.

**Streamline the Holds Process.** Simplify the process for shelving and distributing customer items on hold by allowing self-service pick-up. Further simplify the process by printing one small piece of paper that provides basic customer information and the pick up deadline date and placing the item “spine down” on the hold shelf in alphabetical order. Customer information for “John Smith” could read “J Smit” plus last four numbers of borrower’s card and pick-up date deadline.

#### Additional Services Recommendations

In addition to the primary recommendations above, the Consultants also propose these potential improvements, which might best be prosecuted in coordination with capital facilities project funds or other sources:

**Emphasize Self-Check.** Since the Library has invested in self-check equipment and software, it should strive to maximize the use of that investment. Indeed, some public libraries require only self-check. The Consultants do not agree with that philosophy, but we do strongly recommend utilization of the self-check investment as completely as possible. The potential reallocation of staff

<sup>7</sup> A Babson Survey Research Group study reports “...distance student enrollments have increased for the 14th straight year in 2016, over 30% of higher education students taking at least one distant education course.”

resources can improve customer service, as will an expedited the check-out process for some customers.

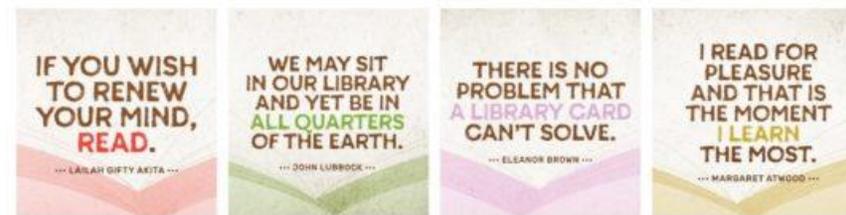
We acknowledge that the interaction between customer and staff at the Circulation Desk can be positive, and informative at times. There are – and most likely always will be – customers who will not use self-check. A single- or double-station customer service desk should be retained and staffed for those who will not or cannot self-check.

We recommend SFPL perform and document a visual study of customer use to identify the optimal locations for self-check stations. A potential upgrade of the equipment is pending, per the Technology discussion on pages that follow. It might be prudent to relocate equipment in conjunction with any upgrades.

**Replace Large Service Desks.** The traditional, large circulation and reference desks can be both foreboding for the customer and act as an anchor for the staff, such that it requires the customer to come to the staff rather than the staff going to the customer. In addition, replacement of the large desks will free-up floor space for more productive uses by converting to smaller, user-friendly footprints.

The Consultants recommend the service desks, especially the large ones found at both La Farge and Southside Branch Libraries, should be removed, downsized, and/or replaced. The desks at the Main Library are not as large and/or lend historic value to the building fabric. If replacement is deemed appropriate by SFPL, we recommend a switch to much smaller stations that are designed to be moved and are partially on casters. We are not recommending shrinking the circulation desk workstation size, just a reduction in the number of stations, which might actual increase available space behind the desk. One station should be scaled to wheelchairs and children, per ADA requirements.

**Provide a Makerspace at Each Location.** In new construction space planning, or in modernizing existing Libraries, convert existing space into Makerspaces with 3-D printing and other fabrication capabilities – potentially specializing in certain techniques or aspects at each location.



### Collections/Resource Sharing

As their most long-standing traditional service, public libraries assemble, organize, and lend a variety of print, non-print, electronic materials, and general information. These collections should be current, dynamic, and representative of all perspectives of the Santa Fe community. Surveys repeatedly show that checking-out books and DVDs are one of the top reasons for residents and visitors to come to the public library, if not the number one reason.

Collection materials should be selected in response to and anticipation of requests from library users. The collection must be continually updated to meet the changing needs and interests of the community through the use of data-driven processes, as well as staff intuition. And efforts should be made to effectively merchandise each collection, regardless of format.

### Consultant Conclusions for Collections

Several Findings and Conclusions related to Library Collections were documented in Section 7 of this Report. To recapitulate those issues and justification for action:

- Collections have increased in numbers without a corresponding increase in space to house them, causing shelving to become overcrowded.
- City and/or State law or policy inhibits SFPL's ability to discard old and worn books, causing many unwanted items to remain on the shelves for an unacceptable period of time, exacerbating the crowded shelf issue.
- Circulation and turnover rate of print materials have steadily declined over the past five years.
- Best practice suggests 15% of a public library's annual expenditures should be budgeted for keeping the collections up-to-date.
- Turmoil in the eBook industry may impact the affordability of eBooks by public libraries, as outlined in Appendix 7.5.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

### Recommended Priorities for Print Resources

**Streamline the Collections.** Run reports for the collections, by age groups, to determine the publication date of all items. Remove outdated and worn items and devise a way to legally and efficiently convey ownership of them to the Friends of the Library or other purveyor of books, etc.

**Reconfigure All Public Shelving.** Another improvement aimed at increasing use of the collections at all Library system locations is to make the shelving for all collection items more user-friendly. This entails widening all public aisles to 48 inches, removing any shelves that measure more than 54 inches above the floor, not using the fixed base shelf, and replacing the lowest adjustable shelf or two with a tilt shelf, only in the adult collections. Tilt shelves will make the spine labels easier to see and will place more of the collection in an easy-to-reach mode for the great majority of customers. Recommended age-specific shelving modifications include:

- **Children's Services.** Age-appropriate height book shelving for all children, include 48-inch high units for easy/picture books with bins instead of shelves for face-out display, and 66-inches high units for fiction and non-fiction books and media.
- **Teen/Tween Services.** Age-specific collection of library materials such as paperbacks and graphic novels on 66-inches high units.
- **Adult Services.** Using existing units but no shelf more than 54 inches above the floor, and utilizing tilt shelves on bottom two shelves, at least 17 inches above the floor. For all Libraries, purchase tilt shelves for the lower one or two shelves of each section of adult shelving that is taller than 48 inches high. The ability to use two tilt shelves with one above the other will be dictated by the height of the materials to be housed, as tilt shelved require more vertical space than do traditional flat shelves.

### Recommended Priorities for Fiscal Resources Recommendations

**eBooks.** Investigate ways to increase SFPL's electronic materials buying power, through consortia and/or negotiated agreements with existing and/or new vendors.

**Budget Levels.** Maintain current budget levels with adjustments for escalation. Plan for increases in the number of customers per City and County population growth, as well as the corresponding need to grow the collection to meet the diverse needs of the community.

### Recommended Priorities for Collection Development

**Collection Development Plan.** Consider implementing the recommended modifications to the current SFPL Collection Development Plan proposed by the Consultants.

**Outsource Collection Processing.** Briefly, outsourcing involves the private sector – in all probability one of the three major firms that supply the vast majority of library materials to public libraries throughout the U.S. – that would not only ship ordered materials to the library but they would also provide all of the physical processing – book jackets, labels, RFID tags, etc. Upon receipt by the library, all that is needed is to open the box, check the packing slip to make certain all materials on the slip are in the box, and they are ready to be placed on the shelves for public use. For the SFPL, this service should also include drop shipping orders directly to each location, thus eliminating two handlings of the items as they pass through the Main Library as they now do.

The Consultants recommend SFPL consider outsourcing of collection processing. Investigate the benefits of contracting for physical processing of print and digital collection resources within the current Library budget framework by soliciting estimates from all the three primary providers. Price competition should save the taxpayers of Santa Fe money.

**Book Industry Systems Advisory Committee (BISAC) Subject & Category Codes.** In addition to the implementation of outsourcing for collection processing, the Consultants suggest SFPL consider converting adult and teen non-fiction collections to BISAC for cataloging and classification. BISAC subject and category codes are how the majority of bookstores shelve the books they offer for sale. Currently the SFPL uses the Dewey Decimal Classification (DDC) system as a numerical method for organizing and grouping non-fiction books into a logical order. Art books are in the 700s, science in the 500s – every subject has a numerical place in this classification system. Dewey Decimal has been a staple of library service for hundreds of years. It is reliable system, but can be confusing to some.

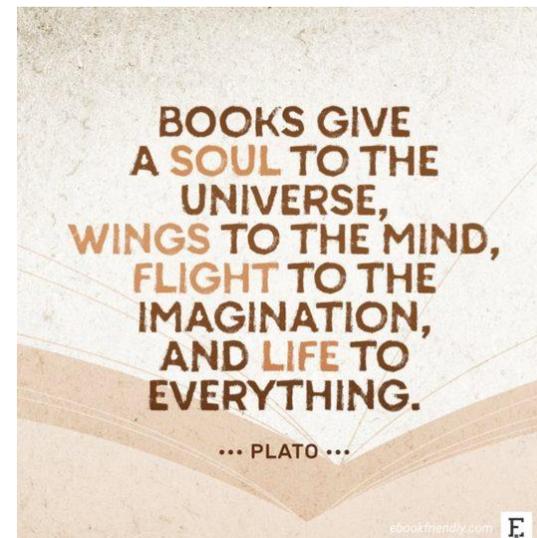
With BISAC there is no numeric code. It is generally held to be more understandable for the public than Dewey. Outsourcing and BISAC are two changes that have the potential to 1) improve customer service; 2) assist with the stabilization of operational costs; and 3) be most contentious among SFPL staff. Neither is new to the profession. Libraries of all sizes throughout the country use one or the other or both.

To move from DDC to BISAC would require – for the existing collections – a re-labeling of the adult and teens/tweens (young adult) collections. This would be a significant staff undertaking, and might be confusing for the public at the outset, inasmuch as both DDC and BISAC would be in place for a period of time –

perhaps up to six months. Nonetheless, the Consultants believe this change could result in an increase in the use of all Libraries in the SFPL system.

The Consultants suggest starting at Southside Library when that facility undergoes reconfiguration during renovations and/or expansion. We believe this change would result in a significant increase in circulation. If SFPL decides to outsource the collection processing work, the selected vendor could include the cost to affix the BISAC labels as part of their bid and their standard service. BISAC should be thought of as a one-year project inasmuch as there will be thoughtful decision-making concerning the BISACs terms to use and the making of signage. The majority of this work will be paid for via sweat equity of the staff.

**The Remaining Fogelson Collections.** The Consultants have toured the vacated Fogelson Library. While there, we observed several collections remaining on-site. While we understand some collections have been removed and are in the ownership of good stewards – and that a task force has been formed for stewardship of what remains – we would be remiss if we did not recommend the task force carefully assess the quality of the remaining collections. We observed items that could be of value, either to remain in SFPL collection, or to be sold for revenue. The City of Santa Fe and SFPL should be interested in the status recommendations that the task force makes for these potentially valuable resources.



## Technology

Once considered a luxury, the use of technology in the modern public library has become an absolute necessity for delivering good service. The great strides made in library technology over the past decade have allowed many public libraries to streamline their staffing profiles through automation and self-service, while providing a more positive experience for both customers and staff.

There are budgetary and other resource constraints that prevent the Library system from having technology that works perfectly all of the time. Nonetheless, there are opportunities to fine-tune, remodel, replace, and/or repurpose existing technology offerings while planning for future improvements.

Before fully informed decisions about the future of SFPL technology can be made, foundational staff positions should be filled and steps should be taken to ensure SFPL's stature and autonomy within the City of Santa Fe's information technology infrastructure.

## Consultant Conclusions for Technology

Several Findings and Conclusions related to Library Technology were documented in Section 7 of this Report. To recapitulate those issues and justification for action:

- An urgent need to fill key Technology staff positions.
- A need for a comprehensive assessment of current technology offerings and future needs at SFPL, including:
  - Integrated Library System (ILS) contract improvements to ensure system functionality meets SFPL needs and the vendor is responsive in support.
  - An effectiveness review of outsourced technology support.
  - Support available from City of Santa Fe.
  - Established and emerging applications for self-service and automation options appropriate for SFPL.
- A need to establish goals for SPFL's control over its technology future over the next three years, including a updated Technology Plan with a refreshment plan and budget.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

## Recommended Priorities for Technology

Because technology allows the Santa Fe Public Library to reach people far beyond its walls with its message, and because this area has fallen behind the curve, the Consultants believe these recommendations are a top priority.

**Fill Open Positions.** Fill staff position(s) with technology leadership responsibilities. In order to be competitive in the tech marketplace, annual salaries for tech industry professionals may approach or even exceed \$100,000.

**Technology Assessment Report.** Facilitate an Edge Report by Library staff to assess the technology resources and needs of SFPL.

**Library Technology Autonomy.** Work with SFPL's ILS vendor and City IT & Communications Department to obtain increased autonomy over Library technology. The Consultants observed that responsiveness of ILS support appeared to be slow and costly – apparently limited in the base contract, or not included at all unless a fee is paid for service.

Should SFPL decide to change vendors, the initial step would be issue a Request for Information (RFI) to determine the general interest of the vendor community. From the responses to the RFI, a Request for Proposal (RFP) could be developed and released to those who responded to the RFI, or which of those SFPL would want to receive the RFP.

**Upgrade Self-Check Equipment.** Upgrade self-check equipment per the vendor's requirements. Consider implementing a competitive bidding process.

**Develop a Library App.** Investigate and develop a robust Library mobile device app that supports customer and staff functionality such as mobile printing, mobile pay, etc.

**Offering Multiple Payment Options for Library/Technology Services.** Allowing customers to pay for services in a reasonable manner is a valuable and attainable strategy. Adding credit/debit card readers to all printers, scanners, and fax machines should be a priority. Also, virtual or phone-based payment options such as *Venmo*, *PayPal*, or *Apple Pay* are viable alternatives to the here-to-fore cash-only library service.

**Install High-End Software.** Install high-end software on select computers to support small business owners and job skills training. Consider software such as Adobe Photoshop, Pro Tools, AutoCAD Revit, or equivalents.

**Provide Laptops, Tablets, and/or iPads for Lending.** Consider established products from vendors that make laptop computers and/or iPads available for public use that do not require staff assistance such as *Laptops Anytime* or equivalents.

**Provide Portable Chargers for Customer Devices.** Many customers bring their own mobile devices such as phones, laptops, and tablets to the Library. As a result, each location should provide charging stations, similar to those found in most airports – or better yet, provide mobile charging packs for customer check-out. This allows customers to work more efficiently where they choose, without interruption while at the Library.

**Provide Mobile Hotspots for Lending.** Consider loaning MiFi hotspots – mobile hotspots that customers can check-out to have Internet access at home.

**Provide Smart Phone Self-Check.** Within the past few years, technology companies who focused on library service have introduced smart phone apps for self-check-out of books and other library materials. Customers can check-out materials from almost any place in the building, freeing staff to focus on assisting customers who have other needs. Consider such for SFPL.

**Ensure Complete Wi-Fi Coverage in All Locations.** City IT should perform a site survey of all three Library locations to ensure that Wi-Fi coverage is uniformly excellent in all publicly-available spaces.

**Ensure that All Mac/Apple/Windows Devices Can Connect to Wi-Fi.** In addition to Wi-Fi coverage throughout each location, ensure customers have no difficulty connecting to the Wi-Fi network with their own devices.

**Employ a Meeting Room Reservation System.** To facilitate and maximize the use of the gathering spaces within each library, an online reservation system should be installed Library system-wide. Such a system allows a person desiring to reserve an available space to access the SFPL website from anywhere in the world, locate the meeting space desired, and place a request for use per SFPL policies, procedures, and charges, if any. The system would “book” the space, notify the requesting customer, allow them to pay and print a confirmation. If the desired space is not available, the system would so inform the potential customer and provide them with a recommendation for an alternate space, time, and/or place.

To further streamline the process of room scheduling, consider systems that allow customers to determine if a room is available directly at the room or online, eliminating any confusion about availability. In these systems, a digital control panel with a small screen is installed near the door of every gathering space so the system can indicate if and when that the room is booked. The schedule for each room is automatically updated in real time. The control panel controls access via a library and/or credit card, and could accept approved payment methods for any charges. These systems can monitor room utilization to help optimize use of the spaces – in each Library and across the entire Library system – or City government. Consider product options such as *Evanced*, *Joan*, *RoomWizard*, or *Condeco*.

**Electronic/Digital Signage.** Television signage should be prominently installed at each location, with a clear standard for signage that informs the public what events will occur and what technology is available at each location. For instance, every location advertises the availability of loaner laptops for public use within that Library. There could also be a clear message indicating how to install and configure the mobile printing app required for customers to print from their personal device to the public-facing printers.

**Technology Plan.** Update the SFPL Technology Plan to reflect any and all adopted recommendations, as well as other technology improvements supported by City of Santa Fe staff. A new three-year Technology Plan is foundational to the entire Santa Fe Public Library system. Ideally, it would include a three-year refresh rate for all staff and public computers – a five-year refresh at the longest.

#### Additional Technology Recommendations

While all are important, the following recommendations may be best implemented in coordination with future Library facilities upgrades recommended in the Facilities subsection on the pages that follow in this Section.

**Automated Materials Handling Systems.** Equipment that automates the sorting process of collection materials returned to the Library has been in operation for over 20 years. As it has become more commonplace, the equipment has been refined and the cost has decreased. Comprised of a return slot or two that read RFID tags as the items are returned, and a conveyor belt that uses the RFID tag in each item to automatically sort them into a number of mobile bins, the space required for such a system is affected by the number of bins.

As a significant staff time saving measure, the Consultants recommend adding automated materials handling system (AMHS) to each location. Start at the Southside Library, with a 7-bin sorter capable of accepting multiple items at one time. Plan and budget for the installation of AMHS sorters at new Library facilities in midtown and downtown Santa Fe. The footprint of equipment offered by various AMHS vendors will likely vary somewhat, so the space required should be verified during the design process.

**Reduce the Number of Desktop PCs.** The trends of more customers bringing their own devices have begun to replace the need for some desktop computers. Likewise, the trend of libraries adding portable computers/tablets for loan within the building that customers can use anywhere they like has also allowed for a reduction in the number of desktop computers. Given the proliferation of customers' mobile devices and loanable laptops in the Library, the number of public computers found at both Main and Southside Branch Libraries could be reduced in number, in favor a few two- to three-seat collaborative computer stations and larger individual computer stations. In-library laptops would more than make up the numbers for total public computers.

**Provide 2- to 3-Person Collaborative Computer Stations at Each Library.** There is demand for public-use collaborative computer stations to support group project work and other multi-person efforts. The Library should take advantage of customers bring their own devices to the Library and convert two desktop computer stations into one collaborative station with two monitors and three ergonomic task chairs each. The net change in space required would likely be insignificant.

**Provide Larger Work Surfaces at Public-Use Computer Stations.** Typical single-person workstations need a larger work surface for customers to work more effectively, allowing them to layout books or additional devices while working at a desktop computer. Expanding existing stations should also benefit from the trend of customers bringing their own devices, to allow conversion of every four desktop stations into three stations with larger work surfaces.

**Install Audio-Video Technology at All Gathering Spaces.** Current group study rooms, conference rooms, and multi-purpose meeting rooms all lack some level of technology. All of these spaces should have a Smart TV or Smart Board, and/or computer projector and screen, depending on the size of the room. Each room should also have videoconferencing capabilities, again commensurate with room size. At least one group study room at the Southside Library should be equipped with a green screen and potentially, audio/video recording software.

**Improve Locations of Catalog Computers.** The Public Access Catalog (PAC) is the backbone of the Library's collection of library materials, be it for check-out or browsing the collection within the building. It is with the Catalog that customers almost always consult to make certain that the Library has a specific title or author within the collection. PACs should be distributed throughout the building, near service points and the shelving that house the collections. An ideal location is on the end panels of the shelving ranges. In addition, there should be one or two sit-down stations for those customers who elect to use the PAC while not standing. The majority of PACs in Children's Services should stand on tables with age-appropriate seating for kids and adults.

**Implement Touch Screens for PAC Computers.** Touch screen technology would make it easier and quicker for customers to navigate the catalog computers used to locate specific books in the shelving ranges. Adjustable height work surfaces would also be user-friendly, allowing access by all people, regardless of age, height, or mobility.



**Provide Lending Lockers for 24-Hour Customer Service.** In all locations, consider the installation of a lending locker system for after-hours pick-up of holds by Library customers. Lockers could be located in a lobby secured from the Library proper, or on the exterior of the Library. Ideally, these lockers could be loaded through the back of each unit by staff from inside a staff workroom. Consider established products from vendors such as *International Library Systems' Intelligent Locker* and *Bibliotheca's remoteLocker*. The Consultants recommend these be best implemented in coordination with future Library facilities upgrades.

**Install Exterior Electronic/Digital Signage.** Install and make use of exterior digital/electronic signage at each Library. These signs not only identify the Library location, but can be used to advertise upcoming events at the Libraries. Consider partnering with a sponsor(s) whose name(s) can appear on the sign in exchange for ongoing funding.

## Facilities

The most recent wave of constructing modern public library buildings in the United States has taught the library community that the foremost goal for achieving success is to build sustainable facilities. And sustainable in library language translates into being affordable to operate – not just being green, but more importantly – operating in the black by being efficient to staff.

The amount of square footage has influence on the amount of staff needed to supervise the public space in libraries.

**Sustainable Facilities.** Planning for operational efficiency implies future construction of single story libraries – as one-story buildings are less expensive to supervise than multi-story structures. As a portion of a public library's total operating costs, personnel costs (salaries and benefits) typically fall in the 70% range. This is true of Santa Fe and its peer libraries.

**Resiliency in Facility Design.** Planning for future resiliency of City facilities is a laudable goal. Public libraries are municipal facilities known to the public, typically open several hours each day. They can be rallying points –shelters or even operations centers in emergency situations – especially if planned and designed with the necessary components to withstand and endure extreme conditions.

## Consultant Conclusions for Facilities

Several Findings and Conclusions related to Library Facilities were documented in Section 7 of this Report. To recap those issues and justification for action:

- A general need of 1.00 square feet of Library space per capita, compared with the 0.87 square feet currently provided.
- As Santa Fe's population increases, so does the need for Library space.
- The three existing Library locations provide very good coverage of the city limits within a convenient drive time.
- Of the three buildings, one is a modern Library, but two occupy aging buildings with layouts that are difficult to supervise and expensive to staff.
- The State Legislative Finance Council has shown a preference to fund multi-use construction projects in recent years.
- An opportunity to relocate the Main Library to a central location within Santa Fe at the Midtown campus should be investigated.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

## Recommended Priorities for Facilities

Opportunities to build new public library buildings in a U.S. city are rare – therefore, invaluable. The Santa Fe community deserves Libraries that function well and attract residents and visitors alike. The result should be buildings that inspire, inform, and provide refuge on many levels – physical, emotional, and intellectual.

Options for facility expansion are recommended in this Section, with a proposed timeline for opening dates of new/modernized facilities.

**Options for the La Farge Branch Library.** Despite the fondness the public has for this Library, the severe limitations the building places upon library service delivery make this location no longer feasible as a long-term option.

The unique characteristics of a Central (Main) Library demand that it be as convenient to all customers as possible, hence a midtown Santa Fe location is ideal. Central Libraries are defined as modern, full-service facilities that serve as both the headquarters of a library system and a library with specialized collections and services not found in branch facilities of the system. A portion of a Central Library also serves as a neighborhood Branch Library for the residents living in its vicinity. Detailed discussions of the needs of a modern Central Library can be found in Appendices 5.3, 5.4, and 5.5.

The opportunity to construct a large new Central Library with easy access and ample parking is rare and must be taken advantage of. The resulting square footage will provide new amenities while ensuring SFPL has adequate space for years to come. For these reasons, the primary 1) and fallback 2) recommendations to replace La Farge include:

- 1) A new 66,500 square foot, two-story Central Library at the Midtown Campus would cost approximately \$35.4 million in 2019 dollars, assuming no site acquisition costs are required.
- 2) Modernization/renovation of the combined 69,106 square foot, three-story Fogelson Library and two associated buildings at the Midtown Campus would cost approximately \$28.7 million in 2019 dollars.

It is important to note that a new two-story Central Library will be less expensive to staff than a three-story Fogelson Library, especially since it is part of a complex comprised of three separate buildings. The ongoing operational cost savings will pay back the increase in capital costs of an all new Library.

**New Central Library Amenities.** A Central Library is defined as a modern, full-service facility that serves as both the headquarters of the Library system and a Library with specialized collections and services not found in branch facilities of the system. A portion of a Central Library will also serve as the Community for the residents living in its vicinity. The size of the Central Library will be approximately 65,000 square feet, based upon the functions housed within the building, as follows.

- **Collections.** Traditional children's, teens and tweens, and adult collections will be included, as well as potential Special Collections such as Local History, Genealogy, and/or Archives. A New Arrivals area will house newly available items for merchandising. Also, the square footage and cost projections for the new Central Library are based upon inclusion of an Automated Storage and Retrieval (ASRS) system for storage of infrequently used books and other items. Deployment of an ASRS system allows for high-density storage of collections in a minimal amount of building footprint, reducing the total square footage and cost for the project.
- **Public Seating Capacities.** The Consultants recommend providing one reader seat for every 800 to 1,000 items in the collection, exclusive of Local History, Genealogy, Special Collections, and Archives. Seating quantity would be determined by function. In addition, an array of gathering/meeting spaces should be included throughout the new Central Library, including:
  - **Auditorium:** Provide a fixed-seat, raked floor auditorium, with seating capacity to be determined by a survey of publicly available venues in Santa Fe. The intent would be to size the room capacity to fill a need that would not otherwise be available. This Auditorium would be acoustically designed to accommodate any type of performance.
  - **Multi-Purpose Meeting Room:** Provide a large, sub-dividable room that accommodates— when divided into multiple rooms – a minimum seating capacity for the given sizes of divided rooms. Provide a total capacity of 250 seats dividable into three rooms (75 seats + 75 seats + 100 seats = 250 seats).
  - **Makerspaces:** Provide at least two such spaces, designed to accommodate any number of functions and equipment – from 3D printing to woodworking, sewing, filming, etc.
  - **Classrooms:** Provide one each at 25- and 35-seat capacities.
  - **Conference Rooms:** Provide a variety of rooms, with minimum seating of one 8-seat capacity room, one 14-seat capacity room, and one 20-seat capacity room.

- **Collaborative Group Study Rooms:** Provide a number of glass-enclosed group study rooms, in at least two sizes of four-seat capacity and six-seat capacity.
- **Tutoring/Research Stations:** Each space should accommodate one to three persons. These rooms can be “built” using office system furniture, and easily reconfigured.
- **Public-Use Computers.** In addition to several loanable laptops, a number of fixed computer stations should be provided throughout, scaled and outfitted for a variety of customer ages and abilities. The Consultants recommend allocating various sizes and functionality of public computer stations, as follows:
  - **Public Access Computers (PAC):** Stand-up stations with adjustable height work surfaces.
  - **Express Computer Stations:** Stand-up stations with adjustable height work surfaces.
  - **Computer Stations:** One seat for adults and teens, and two seats for children – seat and table heights will vary, depending upon age.
  - **Dual Computer Station:** Two seats for two persons at one computer or perhaps two persons at two computers, for adults and teens, and for children – seat and table heights vary, depending upon age.
  - **Collaborative Computer Station:** Two to three persons at one computer, with a large monitor or two, depending on the specialty software installed.

Furniture and equipment in spaces on the interior and exterior of the new Central Library will be moveable to make multi-use of space, from quiet reading and contemplation to performances of all types. The building infrastructure will also be adaptable to future changes required by emerging technologies.

**Libraries Require Adaptable Buildings.** The public library building of today and tomorrow, regardless of size, must accommodate the traditional functions long associated with library service, while being adaptable to future change. Libraries must address dramatic changes in information and consumer technologies, especially library technologies that constantly evolve. As technology has become more sophisticated, so has society at-large, and the public library user in particular. Smartly-designed buildings have the potential to free staff from facilities management tasks so they can focus more time on customer service.

A quality public library must provide a healthy array of technologies and public meeting spaces to go along with books and other forms of media. Therefore, there must be considerable adaptability within the design to permit adjustment for new services, furnishings, and equipment over time. Good civic architecture does not need to cost more than average architecture. What makes it good is that it is thoughtful. It includes all the ingredients for success, in proper proportions. Through thoughtful programming, planning, and design, a new or improved Library should last well over 50 years, through carefully planned expansion and adaptability.

While more information can be stored in less space, a higher level of demand for a wider range of materials has offset the condensation of information, as far as library space needs are concerned. And library furniture and equipment needs to realize the full potential of technology.

**Options for the Downtown Library.** Another Library people are fond of, but with significant limitations on service delivery, the Main Library is nonetheless a resource. Primary 1), and fallback 2) recommendations for extending the life of this Library include:

- 1) Modernization/retooling the Downtown Library into a Cultural Arts Center and local Branch Library, moving Administration and Technical Services to a new Central Library in mid-town at a cost of \$8.4 million in 2019 dollars.
- 2) Replace the Library with a Downtown library kiosk at a cost of \$300,000 in 2019 dollars.

**Southwest Cultural Center as a Santa Fe Public Library.** Should the Main Library of the Santa Fe Public Library system re-locate to Midtown, it would be important that a public library presence remain in downtown Santa Fe – ideally in the historic building currently occupied by the Main Library. The Consultants propose a Southwest Center for the Celebration of Santa Fe Cultural Life, envisioned as a multicultural, multilinguistic, facility incorporating the grand Southwest Room. This facility would also serve as the Downtown Branch Library, offering the following:

- Books and collections of Adult materials.
- A kiosk would be included with a variety of general library materials that would provide 24/7 service.
- Quiet study spaces with comfortable reading lounge seats.
- A Children's collection and programs focused on Southwest life and culture.
- Teen/Tween collections and activities such Poetry Out Loud/Poetry Slams.

- Friends of the Library Bookshop.
- Gallery space for exhibitions.
- A Little Theatre for lectures, presentations, and performances.
- An outdoor Gathering Circle and performance space, located in front of the building, fronting on Washington Street.

The historic Southwest Room would be a focal point of the Cultural Center portion of the facility. The staff, signage, and promotional materials would all be multicultural and multilinguistic. The Cultural Center would house:

- Books and collections of Southwest materials; local authors, publishers, music, film, and photography;
- An Author's Room, celebrating the history of writing in Santa Fe by over 60 local authors.
- Author in Residence,<sup>8</sup> Artist in Residence, Musician in Residence, and Filmmaker in Residence.
- Book printing capabilities.
- A Writers' workshops.

The Center could provide:

- Opportunities for publishers, literary organizations, film groups, and others to participate;
- Publishers as sponsors;
- Partnerships with the nearby History Museum, Fray Angelico Chavez Library, Palace of the Governors, IAIA Museum, and other organizations;
- Partnerships with authors and literary organizations;
- Foundation established with memberships and special programs;
- Tourist destination to learn about Santa Fe; and
- Agreements with local coffee cafés and restaurants to sell food and drinks, as well as cater events.

Conceptually, the Center's layout might include:

- **Street Level:** Southwest Room, Friends Bookshop, lounge and reading spaces, performance space, and Children's, Teen, and Adult areas.
- **Upper Level:** Author's Room, office/workspace for Resident author, artist, musician, filmmaker, quiet study rooms, conference room, and Little Theatre.
- **Lower Level:** Art gallery, Center staff office, workroom, and break room, and storage.

<sup>8</sup> There are now an estimated six active authors calling Santa Fe home.

**Options for the Southside Branch Library.** A very popular place, the Southside Library is situated on the site with ample land in front of the public entrance, but backed up to adjoining streets. As such, it is difficult to expand the building toward the back of the building, but toward the front is possible. Primary 1) and fallback 2) recommendations include:

- 1) Add a 10,000 square foot Meeting Room extension and 4,463 square feet of shell space for future expansion on the vacant portion of the current parcel of land at a cost of \$8.6 million in 2019 dollars.
- 2) Modernize the Library without adding a significant amount of square footage at a cost of \$5.8 million in 2019 dollars.

By adding a Meeting Room extension, direct after-hours access to the existing meeting room could be achieved without going through the original café space. The original café space would be converted to a Makerspace. The Teen Center would become the Teen area of the Library.

**Square Feet Per Capita.** Implementing the primary recommendations for all three Library locations, the SFPL system would achieve a 1.37 square feet per capita goal for 2040, based on the population projections presented in Section 3. This scenario assumes the New Mexico State Library would recognize the entire square footage of a Southwest Cultural Center as library space, as presented in Table 8.1.

**Table 8.1**  
Proposed Santa Fe Public Library System Square Footage, 2040

<i>library</i>	<i>square feet</i>
New Central Library at the Midtown Campus	66,500
Southwest Cultural Center/Downtown Library	35,929
Expanded Southside Library & Teen Center	35,000
<b>TOTAL SQUARE FEET</b>	<b>137,429</b>

Should the City of Santa Fe annex additional portions of Santa Fe County in the future, the increase in population would be absorbed by the above scenario for a future SFPL system.

**Additional Facility Recommendations**

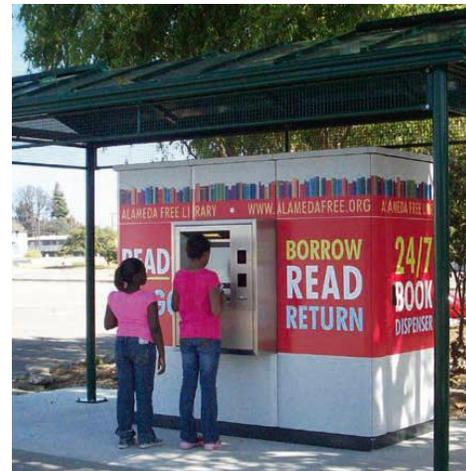
Long-term facility improvements are required to maintain the 1.00 square feet per capita goal for Library space in Santa Fe as the population continues to grow.

**New Branch in Annexed Southwest County.** In any governance option, if the City of Santa Fe continues to annex land to the south and west of the City, good

long-term planning suggests considering the addition of a fourth Branch Library. Best practice would plan for a one-story building of between 25,000 and 35,000 square feet. The cost for such a new library in 2019 dollars would be between \$13.1 million and \$18.4 million.

**Accommodate Extended Un-Staffed Service Hours.** Design and/or modify all Library locations to allow for extended service hours without staff presence as part of modernization or new construction (2022-2024). Retrofit existing locations or plan new facilities for 24/7 access. Investigate such facilitation by other library systems such as Gwinnett County Public Library’s *Open Access* program.

**Provide Kiosk Libraries at Potential Future Library Locations.** Consider established products from vendors such as *International Library Systems’ All-In-One Library*, *MK Systems’ LibDispenser*, and *EnvisionWare’s 24-Hour Library*. A modular library kiosk with full marketplace capabilities would cost between



\$200,000 for an interior model and \$300,000 for an exterior model with associated foundation, covering, and electrical connections, in terms of 2019 dollars.

Install one or more exterior library kiosks that can provide 24/7 service in locations aside from existing library facilities, such as a Rail Runner Station(s) by 2022.

*Exterior book lending/vending kiosk, Alameda Free Library, Alameda, California*

**Make Multi-Purpose Meeting Rooms Sub-Dividable.** Locations with larger multi-purpose meeting rooms would be more adaptable to public needs if they were dividable using movable partitions. Currently, if a group is too large for a conference room yet is too small to fill a larger room, the group ends up taking up that entire space regardless, thereby preventing others from simultaneously using the unused space. Larger rooms should have high-quality moveable partitions, using options such as *Doorfold*, *Hufcor*, or *ModWall*. In such configurations, each subdivided space would require similar audio-visual technology, including projectors, screens, videoconferencing capabilities, etc.

### Human Resources (Personnel & Staffing)

Public libraries and librarians are committed to delivering sustainable, high-quality services to their customers. This is true nationally and equally true in Santa Fe. Library services provided should strengthen and support greater Santa Fe via the promotion of learning, literacy, and workforce development. The major key ingredient to the successful delivery of services is the high quality personnel. Absent a trained, experienced, and caring staff up and down the organization, no library can succeed – and the community is therefore disadvantaged.

The staff of the Santa Fe Public Library is engaged with and loved by their customer base. Like any other resource, staff must be nurtured and supported if they are to perform at a high level. Per current Public Library Standards documented in Section 5 and the Appendices of this Report, the human resources standard for public libraries should include three elements:

- General policies needed to handle employment for the Library;
- Guidelines concerning staffing; and
- Plans for professional development.

### Consultant Conclusions for Human Resources

Several Findings and Conclusions related to Library Human Resources were documented in Section 7 of this Report. To recapitulate those issues and justification for action:

- A small number of unique but important staff positions are currently missing from the SFPL organization.
- There is potential utility in hiring additional para-professional staff to augment the efforts of professional Librarians at SFPL, as a strategy to deliver additional Library service at a somewhat lesser cost.
- Outsourcing a portion of Technical Services processes could allow the reallocation of staff to Public Services or new positions while speeding the delivery of new collection items to the shelves for public use.
- The City's Human Relations Department could streamline job hiring and promotion procedures compared with recent performance.
- A professional development program with clear and career ladders for advancement within SFPL and/or City government is needed.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

### Recommended Priorities for Human Resources

The Consultants are not prone to hyperbole. So it is not without hesitation that we write of the potential damage incurred by SFPL due to the prolonged delays in filling open staff positions at the Library.

**Fill Empty Positions.** Fill all empty position(s) with qualified staff. The Library Systems Manager (Technology Administrator) position is priority one. This is of critical importance.

**Multilingual Staff.** Recruit, hire and/or train more multilingual staff, both professional and para-professional.

**Fill New Recommended Positions.** Santa Fe Public Library should effectively and efficiently respond to Santa Fe's changing community needs by continually evaluating staffing needs and implementing changes to better serve Santa Fe's community needs:

- Consider Marketing Manager and Graphic Designer positions.
- Consider an Outreach and Partnership Coordinator position.
- Consider a Volunteer Coordinator position.
- Consider Building Maintenance/Custodial positions at each Library.

**Hiring, Evaluation & Advancement Processes.** Work with the City of Santa Fe Human Resources Department to refine and streamline the existing employee evaluation and advancement program/processes throughout City government. Address vague and confusing job descriptions, such as for Library Technicians 1, 2, and 3, and Library Assistants 1, 2, and 3, through changes in the Union contract.

**Staff Development.** Establish policies and procedures for ongoing professional development – for both professional and para-professional staff members. Components should include:

- Internal careers ladders for all positions, lifetime.
- Mentorships.
- Professional development/continuing education.
- Cross-training.
- Retention via career path and/or compensation.

The Consultants firmly believe that all of these components are crucial to the vitality of the organization and morale of the staff.

**Youth Services Coordinators.** Assign existing staff members to be Coordinators for Children’s Services and for Teens Services. As an alternative, form Committees for each Service, with rotating Chairpersons assigned to each by Administration.

**Outreach Training & Support.** Train existing staff, as needed, on techniques and new outreach policies and procedures. Transportation support will be required for Outreach staff, in terms of a designated and assigned City vehicle, preferably a cargo van.

**Additional Human Resources Recommendations**

Good long-term planning supports the following Consultant recommendations.

**Attracting & Retaining High Quality Employees.** The high cost of living in Santa Fe has been well documented, making it difficult to attract highly qualified staff within established City of Santa Fe salary guidelines. Consideration should be given to subsidized housing and/or incentivized home ownership for library staff. Such a program is being considered for Public Safety staff in Santa Fe.

**Outreach & Volunteer Coordinator Position.** Santa Fe Public Library should consider establishing an Outreach/ Volunteer Coordinator position.

**Building Maintenance Staff.** The Consultants recognize there is perceived savings in having outsourced building maintenance for all library facilities. However, we believe there is a significant downside that is manifested by:

- Inability to respond to needs when the building is open.
- Lack of thorough cleaning due to press of time to get to the next building.
- Lack of pride because the building is not “my” or “our” facility, but rather, just a space to clean.

These factors distract from the attractiveness of SFPL’s facilities and thus the buildings are often not as welcoming to customers as they could be. For apples-to-apples comparisons, we have not included “custodian” in our overall staff projections. Library maintenance positions might best report to the City’s Facilities Division. In our typical 20-year projections for staffing, we quantify the number of FTE custodians on the basis of one custodian being able to effectively clean and maintain 10,000 to 12,000 net assignable square feet of space if the majority of space is carpeted.

**Proposed Staffing Plan for Future Library Facilities**

Future SFPL staffing projections for 2023 are tabulated in Table 8.2, based on implementation of Consultant automation recommendations.

**Table 8.2**  
Future SFPL Staffing Projections – 2023

<b>Central Library Administration</b>		2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>	
Library Division Director	1.00		
Contracts Administration	1.00	from Tech Services	
Marketing Manager	1.00	new position	
Library Services Director	1.00		
Outreach/ Volunteer Coordinator		future position	
Library Assistant	1.00		
Graphic Designer	0.50	new position	
SUBTOTAL FTE		5.50	
<b>Central Library Systems/Special Projects</b>		2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>	
Library Systems Manager	1.00		
Special Projects Administrator	1.00		
Librarian Temp Positions	2.00		
SUBTOTAL FTE		4.00	
<b>Central Library Technical Services</b>		2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>	
Library Services Director	1.00		
Acquisition Librarian	1.00		
Library Technician	1.00		
SUBTOTAL FTE		3.00	
<b>Central Library Public Services</b>		2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>	
Library Services Director	1.00		
Library Section Manager	2.00	Reference & Circ	
Librarian, 5 full-time, 2 part-time	6.00		
Library Assistant, 3 full-time, 4 part-time	5.00	per AMHS & ASRS	
Library Technician, 3 full-time, 4part-time	7.00	per AMHS & ASRS	
SUBTOTAL FTE		21.00	
TOTAL CENTRAL LIBRARY FTE		33.50	

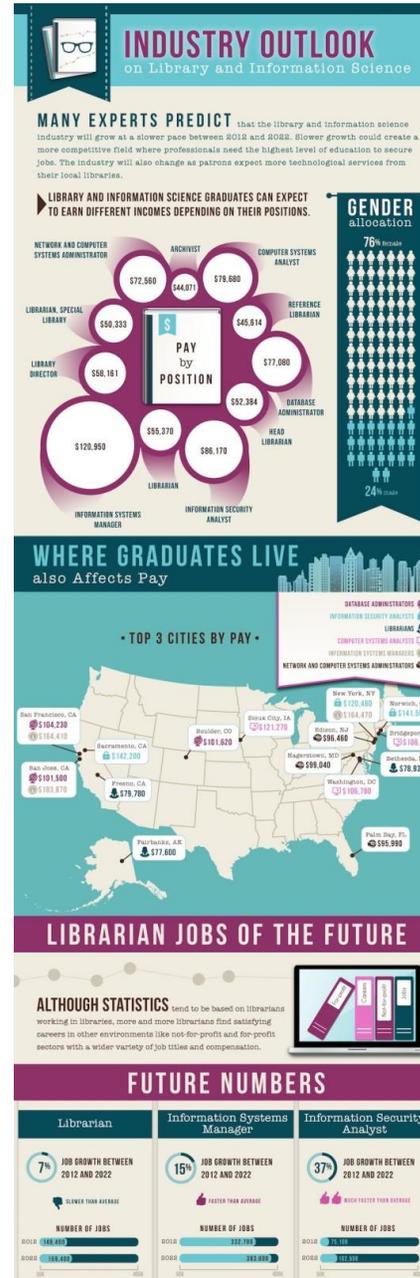
**Table 8.2 (continued)**  
Future SFPL Staffing Projections – 2023

<b>Downtown Branch Library</b>	2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>
Library Services Director	1.00	
Library Section Manager	1.00	Circulation
Librarian, 2 full-time, 1 part-time	2.50	
Library Assistant, 1 full-time, 1 part-time	1.50	
Library Technician, 2 full-time, 2 part-time	3.00	per automation
<b>TOTAL DOWNTOWN LIBRARY FTE</b>	<b>9.00</b>	
<b>Southside Branch Library</b>	2023	
<i>personnel designation</i>	<i>FTE</i>	<i>comments</i>
Library Services Director	1.00	
Library Section Manager	1.00	Circulation
Librarian, 2 full-time, 2 part-time	3.00	
Library Assistant, 2 full-time, 1 part-time	2.50	
Library Technician, 2 full-time, 3 part-time	3.50	per automation
<b>TOTAL SOUTHSIDE LIBRARY FTE</b>	<b>11.00</b>	
<b>GRAND TOTAL LIBRARY FTE</b>	<b>53.50</b>	

The grand total 2023 FTE is projected to be 53.50, an increase of 6.50 FTE from actual (not approved) 2019 levels. This model assumes a new Central Library, a renovated Downtown Library, and the existing Southside Library

**Proposed Table of Organization**

**Table of Organization.** The Consultants recommend SFPL modify the current Table of Organization to reflect new positions and strategic priorities, as they develop.



### Marketing & Advocacy/Community Engagement

Public libraries quietly performed their duty to service for over two centuries. Silent modesty is no longer an option. The public library must make their presence known, front and center in the minds of customers and government officials alike – with all hands on deck for Conversations with the Community!

Defined by *Webster's Dictionary* as “The process or technique of promoting, selling, and distributing a product or service,” marketing the offerings at the Santa Fe Public Library is a crucial component to its future success. For a service organization such as a public library, **promoting** is the key word.

- **Marketing.** Market existing and new library programs, services, and existing locations. Going forward, marketing should include branding, and community education;
- **Public Relations.** Include partnerships, outreach, and special events; and
- **Advocacy.** An activity that has some legal restrictions on what City employees can do, advocacy should be done in coordination with the Friends of the Library.

### Consultant Conclusions for Marketing

Several Findings and Conclusions related to Library Marketing were documented in Section 7 of this Report. To recapitulate those issues and justification for action:

- Many residents and workers in Santa Fe do not know the Santa Fe Public Library.
- Everything SFPL does is a public relations opportunity.
- Librarians as candidates has been a successful campaign devised and implemented across the U.S. by everyLibrary.org.
- A major change in library facilities is a good time to change branding.
- Only once all components are in place is it the proper time to develop, staff, and slowly roll out a library system-wide marketing strategy.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

### Recommended Priorities for Marketing

Expand Marketing for all services is a key goal of this 21<sup>st</sup> Century Library Plan, just not the first priority.

**Marketing Santa Fe Public Library.** The how, when, and where of library marketing are dependent upon services. What is being sold must be ready for sale. Going forward, marketing will include partnerships, special events, outreach, and coordination with the Friends of the Library. The Consultants recommend the initial focus should be on, in order of priority:

- Branding the Library system using professionally developed marketing materials, and renaming the Main and La Farge Libraries, still honoring Oliver La Farge in new facilities.
- Crafting a series of “Headlines” touting the outcomes of the recommendations contained in this Report.
- Staffing a Marketing Team with existing or new hires.
- Creating and launching a Library App.
- Upgrading the Library webpage.
- Upgrading interior and exterior electronic/digital signage that includes a weekly calendar of events with advance notices of major events.

**Outreach Services.** Develop an initial marketing plan for Outreach Services, ahead of the overall Library system marketing plan.

**Pop-Up Library.** Assemble resources to implement a Pop-Up Library for use in Outreach Services.

**Marketing Team.** For SFPL, the Consultants recommend a two-person marketing team comprised of the following:

- A full-time Marketing Manager.
- A Graphic Designer, a half-time position.

The Manager would report to the Library Director. The Manager should be a professional who has a degree in marketing. Having public library experience would be a plus, but not mandatory. Ideally, the Graphic Designer should have demonstrated design experience. The Manager should be the first hire, as soon as the position has been established and the recruitment process completed.

**Branding:** The remaking of the public library system of Santa Fe through construction and renovation is a chance to reorient residents or visitors to the Santa Fe Public Library. Moving the La Farge Library to a much larger, modern facility on the Midtown campus and changing its name to the Central Library will provide a better geographic descriptor for the location. Moving Administration and Technical Services functions from downtown to the new Central Library makes logistical sense. Then, changing the name of the Main Library to the Downtown Library will let people know it is located near the square of Santa Fe.

## Finance

Maintaining a constant revenue stream is one of the most significant challenges public libraries face annually. Innovative thinking is required to provide innovative programs and services. Both sides of the equation must be worked – efficiencies to keep expenditures reasonable, and revenue gains to fund innovative new services and programs.

As the 2014 Aspen Institute report recognized, the fierce competition for funding means that public libraries must be successful in cultivating support of local stakeholders and governing bodies if they are to prosper in the future. Most states have restrictions on funds used for capital construction and investment, as opposed to ongoing operations. Capital funds are only required periodically, and any debt incurred is eventually retired. Sustainable sources of operational revenue are needed, but not easily acquired or augmented.

Maintenance of effort in securing adequate revenue for budgeting is required of all public libraries. In addition to being supported by local tax revenue, many public libraries also enjoy the donations from Friends organizations, Library Foundations, or both. SFPL has certainly enjoyed the support of their highly successful Friends group. It seems more is needed.

## Consultant Conclusions for Finance

As outlined in detail in Section 7, SFPL's operating revenue per capita is good compared to the 11 other largest public libraries in New Mexico. However, there are pressing needs that this study has identified, needs that will be extremely difficult to address without additional operational funding. The several Findings and Conclusions related to Library Finance are justification for action:

- A significant percentage of SFPL cardholders do not reside in Santa Fe.
- A survey of the fiscal practices of other libraries would be fruitful in establishing realistic financing goals based on pragmatism.
- The revenue potential of various forms of earned income needs to be investigated by SFPL, as being legal and practical.
- A number of governance options are possible, but those typically take years to implement.
- State and/or local anti-donation laws have hampered SFPL efforts to raise money from surplus books and other collection items.

In response to these findings and conclusions, the Consultants recommend SFPL and the City of Santa Fe pursue the following actions.

## Recommended Priorities for Finance

The City of Santa Fe and Santa Fe Public Library should pursue sound fiscally planning by actively seeking alternative revenue streams to augment its income.

**Increases in Funding.** The simplest way to increase Library funding is to receive more money from the City. However, the Public Library is only one of several service providers operated by the City, and funded chiefly by resident and commercial taxpayers. And while it is reasonable to anticipate modest cost-of-living increases from year to year, it is not practical, in our opinion, to expect significant increases in City funding in the near term. Therefore, other funding sources need to be considered. The options are, in what the Consultants believe are viable, in the following order of priority:

1. Santa Fe County.
2. State General Obligation (GO) Bond.
3. State Aid.
4. SFPL Earned Income.
5. Real Estate Developer partnerships.
6. A Library Foundation.
7. Grants.

**Santa Fe County.** At \$25,000 per year, this amount does not begin to cover the costs of providing library service to County residents who use the SFPL. Assuming the current SFPL per capita budget equates to \$45.00 per person for City residents, \$25,000 pays for 555 County residents. However, according to the SFPL records as of October 2019, there are 10,839 registered County cardholders, of which 18.1 percent have borrowed SFPL collection items. Using the aforementioned \$45.00 per capita figure, the County should be providing \$487,755 ( $\$45 \times 10,839 = \$487,755$ ).

Another way to look at the data is on the basis of items checked out. That basis would produce \$88,380 (1,964 County cardholders having borrowed collection items). Thus,  $\$45.00 \times 1,964 = \$88,380.00$ . Another way would be to look at the fact that those 1,964 County residents borrowed 7,052 items. Assume an average costs per item of \$25.00 and the dollar value would be \$176,300.

The data cited above concerning number of County residents, items borrowed, etc. is for a single day generated by SFPL's Integrated Library System (ILS). That data is constantly changing. Therefore, a more reasonable way to analyze a fair amount of County support for SFPL is in the number of registered borrowers who use the Library. Use, however, should not be limited to the

borrowing items. There are, almost certainly, County residents who use SFPL computers, attend programs, read and study collection items, without checking them out. There is no easy way to determine what that number is. Therefore, the Consultants recommend a just and fair approach would be to make the assumption that approximately 20 percent of the in-County residents use the Santa Fe Public Library, as demonstrated by the 10,839 registered County cardholders (19.4% of the October 2019 total). Subsequently, SPFL should gather County use data annually, possibly in June of each year, and share that information with Santa Fe County for their forthcoming fiscal year budgeting.

**Non-Resident User Fee.** Another way to obtain funds from Santa Fe County residents who do not live in the City might be a non-resident fee. Such a fee could be implemented, provided there is no state rule/law that precludes such a fee. Based on recent input from the State Library indicates that such a fee would make SFPL ineligible for State Grants in Aid, but not necessarily GO Bonds.

A non-resident fee could take one or more of the following forms:

- Proof of residency in order to obtain a SFPL borrowers card;
- Card required for checking out of Library collection resources and using Library computers and scanners;
- Amount of card equal to rounded up per capita funding provided by City, County, and State combined funds plus a 10 percent surcharge for processing expenses; and
- Card is valid for 365 days from date of “purchase.”

There could also be:

- Family non-resident card;
- Children’s and/or Youth card; or
- Card with a value that is based on number of items borrowed and/or computer/scanner use.

The Consultants suggest caution so as to not make the issuance of a card to time-consuming when trying to explain the reason for the card in the first place.

**State Funds.** Neither New Mexico GO bonds nor State Aid should be taken for granted, no pun intended. The last bond issue was approved by 68 percent of the state’s voting public. SFPL, and with the SFPL Friends throughout the city and county will need to be active and vocal advocates for the bond program when it is next presented to the voters. The same advocacy needs to be present at appropriate meetings of the New Mexico Library Commission with regard to

State Aid funds. Losing sight of the importance of consistent advocacy for the needs of the Library and the community and how the Library assists in meeting community goals is critical.

SFPL should consider rallying supporters to advocate for libraries at the State Capitol on January, 15 and 16, 2020.

**Meeting Room Usage.** Library meeting rooms constitute a very important part of a public library’s service offerings. For most public libraries the rooms are used for both library-planned and presented programs as well as being available for community organizations to have meetings at the library.

When the community groups use the spaces (could be a large multi-purpose type room or a smaller conference room) there is, based on the experience of the Consultants, usually some work required on the part of library staff – room setup, take down following the usage, and maintenance, plus there are utility costs. All of this is an expense for the Library. Therefore, we believe it is reasonable to have a “room charge.” Our experience is that many libraries have a two-tier charge – one for “non-profit groups” and another for “for profit” organizations. The former’s charge would be less than the latter. The charge would be, for example, an hourly charge with a one-hour minimum. The charge should – at minimum – be cost recovery. A better approach would be cost recovery plus overhead at a rate of no less than 10 percent, no more than 25 percent. After a new Central Library is built, such a fee might render \$20,000 annually, or more.

**Vending Machines for Food & Drink.** Public libraries have generally backed away from a strict “No Food or Drink Allowed” policy and have more of a “Lids Must Be On Liquid Containers.” Many libraries have tried the Barnes and Noble bookstore approach of serving food and drink only to find it unsuccessful because (a) library staff are not proficient in operating a café, even a small one, or the selected vendor is not as qualified as anticipated. Nonetheless, library customers like their coffee, tea, and sodas – and also some snacks. A good solution is to have one or more very good vending machines that are serviced on a regular basis by the vendor and that have a breakeven plus charge, said charge paid by credit card or cash – but not cash that comes from the staff making change. Vending machines will not generate a huge amount of revenue, but it will help the bottom line and it will be well received by the public. Are there maintenance issues? Yes, but placed in the right location within the building and with reasonable “do’s and don’ts vending will be a plus on all fronts.

**Library Foundation.** Library Foundations are not new. They range from New York Public Library to Seattle to San Antonio to Benicia, California, Whatcom County, Washington, and Wayne, New Jersey. Often there is Friends of the Library organization as well as a Library Foundation. Both are typically 501-C-3 organizations. Both require – or certainly should require – the assistance of a lawyer to make certain that all state and local laws, rules, regulations, etc. are adhered to and in place for the public to see if so desired.

For Santa Fe, the Consultants believe a library foundation is a doable proposition. There is no reason why both the Friends of the Library (FOL) and a foundation cannot both exist for the benefit of the SFPL and the greater Santa Fe community. The FOL is a membership organization whereas a foundation usually does not have members, it has donors. The FOL may also, of course, have donors.

For success, the Consultants recommend that a SFPL foundation's resources be used for very specific purposes and in no way be seen as a yearly way to supplement the operating budget of the Library. Specific purposes might be, as an example, to help fund an auditorium in the downtown Library, as it becomes the Southwest Cultural Center and Library.

**Endow the Development of Library Collections.** When hard times come – and they always do – one of the first library budget items to be reduced is collection development. Books do not talk, no pun intended, and the library still has a lot of books and media for the customers – just not as many new items – and all too often good items that help strengthen a collection go out-of-print before the good times return, witness the Great Recession of 2007. Therefore, the Consultants believe a worthy goal for SFPL would be to strive to endow the collection budget.

On the basis the current budget for collection development is over \$500,000, and the annual CIP index would increase by two percent each year, a budget of at least \$552,040 would be needed by 2025. Further assume that the worst case for a reduction would be \$200,000, the Collection Development Endowment principal by 2025 would need to be \$2 million if the full \$200,000 would be replaced with Foundation funds. Though this may appear to be an unreachable goal, the population of Santa Fe has the necessary fiscal resources, as discovered by the customer analytics market study documented in Section 4 of this Report.

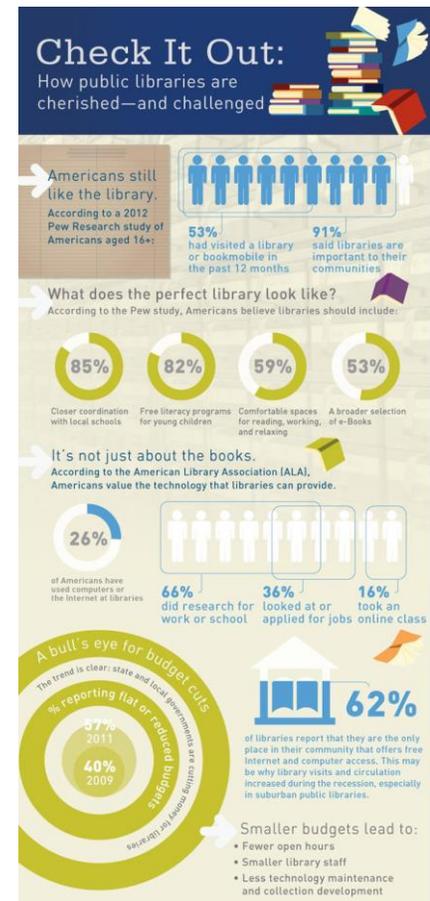
The policies and procedures of such a Foundation would be structured so as to prohibit funds being withdraw from the principal if the primary funders of the Library, e.g. the City and County of Santa Fe, reduce their budgets on the basis of the Foundation filling the gap on a regular basis.

**Grants.** There are untold grant opportunities for public libraries. Successful grantsmanship depends on the following factors:

- Trained and experienced grants writer on staff.
- Projects that address the stated goal(s) of the prospective funder.
- Projects that clearly address community needs and how the proposed grant will help meet those needs.
- Proven record of successfully using grant money to improve the library and the city/county.

The place to start would be for SFPL to “join” The Foundation Center and avail itself of their resources.

**Funding by Midtown Developers.** At this point in time, the role of the successful Midtown Developer or Developers might play concerning the future of SFPL is unknown. The City should begin to think about and plan for the time when reaching out to whatever developer and/or collaborative structure emerges, the Library has a story to present and a role that the developer(s) can play in potential mixed-use projects such as Library and retail and/or affordable housing – a role that will make Midtown even more of a success than might be currently envisioned.



Review all existing fiscal policies and procedures with regard to implementing recommendations and the corresponding changes required. Develop a revolving Financial Plan designed to facilitate the implementation of the Plan. Consider staff suggestions and/or Master Plan recommendations for Finances:

- Survey the fiscal practices of other libraries within New Mexico and beyond, to establish pragmatic funding goals.
- Investigate the possibilities of room rental charges, to yield enough revenue to offset Library system operational costs for administration, operations, and maintenance of meeting room use by the public.
- With the goal to garner taxpayer support for a larger share of the annual City budget, adopt the State of Maine’s approach of providing each customer with a receipt-type text or email that shows the value of the services received following most library transactions.
- Budget for new Outreach Services, including for a vehicle(s) for staff to use in outreach efforts.
- Budget for future facility modifications and/or construction.
- Consider other sustainable source options, such as:
  - Library Foundation.
  - Library Endowment.

Nationally, the most successful public libraries are those funded by Library Districts. They typically have adequate funds voted by their constituents, while enjoying the autonomy of controlling their own destiny. Legislation may be required to “legalize” Library Districts in New Mexico. And they take time to formulate, educate the public as to their utility, and then pass. For these reason, the Consultants only recommend Santa Fe consider forming a Library District as a long-term solution.

#### Additional Finance Recommendations

**Library Foundation.** A library foundation should be separate from the FOL. And while the FOL is a 501c3 organization there may be persons/corporations that either do not recognize the FOL as a charitable entity or prefer to donate only to foundations and/or nationally recognized organizations, e.g. United Way, American Heart Association, etc. To form a Library Foundation and for it to be successful there would need to be at least one paid staff member. The FOL and a Library Foundation could co-exist provided there was a clear set of policies and procedures in place. Early on, the Consultants would not expect a Foundation to be able to raise large sums – perhaps five figures would be possible.

However, given the psychographics of SFPL core customers, significant potential exists through nurturing the right residents of Santa Fe.

**Endowments.** One or more endowments could be established, partially if not totally, funded at the start from one or more of the sources described above. The Consultants believe a most practical initial endowment would be the collection of library materials – if not in whole, perhaps in part, such as Children’s collections. A seed gift would most likely be needed to establish an endowment. And, the wording for expenditures would need to ensure that local government revenue could not be decreased because the endowment is there to make up the difference. This is not to forever preclude this, but there would have to be policies that would clearly state when a downturn in local tax revenues could be partially offset by endowment funds.

An endowment would need to have a base of at least \$250,000 before it would be a viable source of revenue and then probably a cap of five percent of endowment principal on an annual basis. The expectation would be that the endowment would earn more than five percent per year – either due to good investments or new funds coming in.

**Library Tax Measure.** In the last two decades, the use of a special tax measure has succeeded in providing a minimum base of revenue for many public libraries seeking funding stability. A tax measure would be placed on the local ballot, and if it succeeds it can provide residents with a sense of responsibility for their public library, taking it out of annual budget debates. Such a measure would provide a determined tax base that is permanent for a specific number of years, with some being renewed after 10 or 15 years of existence.

**Increased County Funding.** During the Community Engagement process, the Consultants spoke with at least on County Commissioner who was optimistic the County would fund SFPL at a higher level than the typical \$25,000 annually they have contributed for several years. Assuming one-quarter of County residents not living within the Santa Fe city limits use the Santa Fe Public Library, that would equate to approximately 16,000 people. County funds in the range of \$160,000 annually would equate to paying \$10.00 per person, well below the City contribution of over \$43.00 annually.

**Non-Resident Fee(s).** If the City or SFPL decides not to pursue becoming a Library District, and the County does not volunteer a significant increase in current funding levels, Santa Fe could consider implementing a non-resident fee structure to raise additional revenue via a per capita charge.

### Governance/Planning (Administration)

Public library administration oversees all aspects of library operations, as has been addressed in the subject headings of this Section of the 21<sup>st</sup> Century Plan. The governing body(s) of a typical public library system are charged with developing, safeguarding, and efficiently allocating all of the libraries resources. Therefore, advanced planning is a critical component of good governance. Policy making is as well, often in a more reactive instance than forward-thinking planning activities.

In Santa Fe, the Library Board adopts policy and provides oversight of budgets, supervises the Library Director, and helps set strategic direction in performing their advisory mandate. Their responsibilities also include advocating for the library, to identifying community priorities, following state and national laws applicable to libraries, and to planning for the future of the library.

### Consultant Conclusions for Governance

Several Findings and Conclusions related to Library Governance were documented in Section 7 of this Report. To recapitulate those issues and justification for action:

- Public library administration is typically tasked with long-range planning on a number of fronts, over varying planning horizons:
  - Strategic planning of up to five-years.
  - Facilities planning of up to 20-years.
  - Technology planning of up to three-years.
  - Collection Development planning of up to three-years.
- Library admin is typically responsible for exploring potential partners with whom to symbiotically join forces to serve their common public.
- Typically, Library Directors rely on some sort of “cabinet” of Library Leadership, with regular participation by all staff levels, to make the policy and procedural responses and changes as they are needed.
- Most successful public libraries have a procedure that regularly gathers public input and feedback.

In response to these findings and conclusions, the Consultants have made several recommendations that address these issues in previously documented portions of this Section. In addition, we recommend SFPL and the City of Santa Fe pursue the following actions.

### Recommended Priorities for Governance

**Establish an Administrative Council.** Establish an Administrative Council (AdCo) for administrative and management purposes. The AdCo members would attend Administrative Council Meetings, Branch Meetings, Department Meetings, and City Departmental Meetings.

**Table of Organization.** Modify the current Table of Organization to reflect new positions and strategic priorities.

**Homeless/Unsheltered Policy.** Establish a policy and procedures for serving the homeless and unsheltered, both in libraries and in partnership with other facilities. Survey other public library policies that report success.

### Additional Governance Recommendations

Public libraries play a hub role in the community, using partnerships with other institutions to connect people with services and help.

**Partnerships.** Examples of such partnerships focus on area such as community health, mental health, youth leadership, needs of the homeless, needs of immigrants, job seeking, access to social services, legal aid programs, ESL classes, literacy programs, needs of seniors, needs of military and veterans. In such partnerships, the library can use its existing outreach channels to promote programs and can offer a venue for hosting events. Santa Fe Public Library is committed to exploring and potentially developing partnerships with:

- City of Santa Fe Departments.
- The Chamber of Commerce and Santa Fe's service organizations.
- Santa Fe County Housing Authority and Santa Fe Civic Housing Authority.
- Santa Fe Public Health Office.
- Hospitals, Pediatricians, Dentists, and Clinics.
- Santa Fe School District.
- Homeschool groups and the Santa Fe Youth Council.
- Santa Fe Community College.
- Multicultural organizations such as City of Santa Fe Immigrant Community Committee and Somos un Pueblo Unido.
- Small business mentors such as Santa Fe Business Incubator and SCORE.
- Workforce Development.
- Local Home Owners Associations and Apartment complexes.
- Nursing Homes and Assisted/Independent living facilities.
- Realtors.

**City Department Partners.** The Library system currently has limited resources to staff more programs. Santa Fe Public Library can expand services for Santa Fe's teens and tweens by developing viable partnerships to coordinate activities with Santa Fe Parks and Recreation and the Santa Fe Police Department. Santa Fe Police could partner with the Library for Teen programming as both an educational and crime prevention strategy. Santa Fe Parks and Recreation could partner with the Library for programming with all ages as an educational strategy.

**Governance Options.** See the Finance portion of this Section for a detailed discussion of governance recommendations.

