

Library Advisory Board - Minutes
April 9, 2009, 4:30 p.m.
Modesto Library Conference Room
1500 I Street, Modesto, CA 95354

- I. The meeting was called to order at 4:30 p.m. by Chairman Sheridan Beuving
Present: Pamela Floyd, Margaret Bowen, Nadine Dunker, Joshua Vander Veen, Sue Henderson, Sandy McDowell, Sheridan Beuving, Laura Jensen, Anne Marie Gold, Vanessa Czopek and Susan Lilly

- II. Approval of Minutes for April 9, 2009 – Motion: Nadine Dunker/Second: Sandy McDowel. Unanimous Approval.

- III. Public Comment - none

- IV. Old Business
 - A. BOS Annual Report - Chairman Sheridan Beuving is scheduled to make a report to the Stanislaus County Board of Supervisors on Tuesday, April 14, 9 a.m. meeting. County Librarian Vanessa Czopek will accompany him and introduce him to the board. LAB members are welcome to attend.

 - B. Funding Study Report – Sheridan Beuving introduced Anne Marie Gold, who discussed types of libraries and funding models. A detailed report is attached.

Summary:

Four ways libraries are organized in California:

- 1) County Library (various education code sections for basic organization, including financing/funding authority)
- 2) City Library (charter authority)
- 3) Independent Special District Library
- 4) Joint Powers of Authority Library (2 or more government entities)

County Library Financing:

- 1) General Fund
 - a. Library competes for funding against other county services or Board of Supervisors may earmark a percentage of the budget (as in San Diego).
- 2) Dedicated Tax
 - a. These libraries (12 special districts) receive a set portion of the 1% property tax. Not currently used for new governance structure. All pre-date Prop. 13.

- 3) Voter Approved Tax
 - a. Includes assessments, special taxes, sales taxes – after 1996 (Prop. 62) a 2/3 majority was required.
 - b. Sales tax libraries include Stanislaus County, Nevada County, Solano County, Santa Cruz – JPA, Fresno. These five have 100% of the special sales tax dedicated to the library. Other sales tax libraries, which receive a portion of a local sales tax are Salinas, Richmond, Oxnard, Yolo County and Pacific Grove. Many other sales tax elections have failed.
- 4) There is a direct correlation between the money invested in the library and how effectively that library can serve its constituency. In measures such as spending per capita, staff per 1,000 people, reference, circulation and hours open, Stanislaus County is below the state average in all but hours open.
- 5) Conclusion: The presenter recommends that Stanislaus County build on its successful funding model of a dedicated sales tax and engage the community with the library by demonstrating its value. If the community is invested in the library (feels a sense of ownership) it will likely continue to support it at election time.

V. New Business

- A. Report on Conference – Chairman Sheridan Beuving reported on the CALTAC (California Association of Library Trustees and Commissioners) Conference. He left the conference with new energy and enthusiasm for libraries. Key messages that he wants to share are:
 1. The library is not an option...it's essential to our community.
 2. The library is constantly evolving, embracing new technologies and providing relevant information to the public.
 3. It's a learning place and a family place.
 4. It's alive, vibrant and necessary
- B. Miscellaneous Information –County Librarian Vanessa Czopek reported:
 1. Self check-out is coming. It will be implemented in Modesto first, followed by Salida, Turlock and Ceres.
 2. There is a \$1.3 million budget gap. Some fund balance will be used. Managers will be taking 13 furlough days. The county is talking with unions about a furlough plan for represented employees.
 3. In the last quarter of 2008, there was a 9% drop in sales tax revenue.
 4. Sheridan and Vanessa will present the library's annual report to the Board of Supervisors Tuesday, April 14, during National Library Week.
 5. The Board of Supervisors will also be asked to approve the use of library space by Friends of the Library groups for book/gift shops.

VI. Correspondence – none

VII. Announcements – none

VIII. Next meeting will be held July 9, 4:30 in the Modesto Library Conference Room. The agenda will include the Outreach Plan, Media Policy/Guidelines for review/adoption and a library funding report to the Board of Supervisors.

IX. The meeting was adjourned at 5:38 p.m.

California Public Library Organization



**CALIFORNIA PUBLIC LIBRARY ORGANIZATION
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INTRODUCTION

From Yreka in the north, where rural poets gather at a workshop to improve their craft, to El Centro in the south, where grade school children come together to celebrate the birthday of a favorite author, local public libraries play a critical role in the lives and learning of all Californians.

Libraries promote the free flow of information – one of the pillars of freedom in American society. Libraries devote their skilled staff and financial resources to disseminating ideas and information, encouraging a life-long pursuit of knowledge and discovery, and inspiring people of all ages, cultures, and economic circumstances to broaden their understanding of our world. Local libraries confer profound and wide-ranging benefits on our modern society by:

- Connecting residents to information and people around the globe by supplying access to books, magazines, newspapers, the internet and database resources;
- Preserving and expanding our culture by collecting and providing access to CDs and DVDs highlighting our music, literature, and movies;
- Informing and enriching people’s lives by tutoring students and teaching English to adults;
- Creating intellectual and artistic communities and promoting the sharing of ideas among members of diverse communities by forming book clubs to explore and discuss literature;
- Entertaining our children and encouraging their love of reading with story times, wildlife and science demonstrations, and other fun and educational programs; and
- Sharing services and knowledge with our most remote communities and immobile populations by creating cooperative resource sharing systems, public-private partnerships, satellite branches, and bookmobiles.

How is it that libraries succeed in enriching our society in these and so many other ways?

Each of our diverse local libraries shares a common reliance on a limited number of state laws and constitutional provisions that outline their governance, funding, services, and service area. Identifying and understanding these laws is important not only for local officials and library staff, but residents and patrons too. A library’s legal authority, combined with its historical and political circumstances, shapes who controls the library and makes decisions about its activities, which revenues will support library services and facilities and how library funds will be spent, as well as how and where each library will provide services.

In 1994, the California State Library published the original *California Public Library Organization*. Written by Linda Wood, the Alameda County Librarian, the report provided an overview of the different types of libraries, described their commonalities and statistical characteristics, and identified relevant policy issues. This document updates and modernizes the 1994 report. Specifically, this publication identifies the different types of local public libraries and compares their characteristics, operations, service area, services, and revenues. An organizational matrix highlights the essential legal authority, formation, governing board, local financing, and service area of each library type. Statistics, charts, graphs and examples highlight the variation in results that these factors produce.

As libraries evolve to meet the public’s modern needs and preferences, this document will help citizens and policymakers gain a better understanding of how local libraries organize, operate, and provide services in California’s diverse communities. It may also help educate and inspire Californians to participate in and improve their own local public libraries.

April 2007

CREDITS

California Public Library Organization Project Advisory Group

Butte County Library – Nancy Brower, County Librarian (Retired)

Contra Costa County Library – Anne Cain, County Librarian

El Dorado County Library – Jeanne Amos, County Librarian

Monterey Public Library – Kim Bui-Burton, City Librarian

Palos Verdes Library District – Katherine Gould, Library Director

Pasadena Public Library – Jan Sanders, City Librarian

Santa Barbara Public Library – Carol Keator, City Librarian (Retired)

Santa Clara County Library – Melinda Cervantes, County Librarian

Santa Cruz City-County Library – Anne Turner, Library Director

Ventura County Library – Starrett Kreissman, County Librarian (Retired)

California State Library – Susan Hildreth, State Librarian

Ira Bray, Library Development Services

Project Director – Anne Marie Gold, Sacramento Public Library, Library Director

Project Consultant – April Manatt

All data in the report is from FY 05/06, from *2007 California Library Statistics* <http://www.library.ca.gov/html/LibraryStats.cfm>. Copies of this publication are available on the California State Library website at www.library.ca.gov, or by contacting the California State Library at 916-654-0261.

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CALIFORNIA'S PUBLIC LIBRARIES: ORGANIZATION, FUNDING & SERVICE AREA

A handful of state statutes and constitutional provisions dictate local public libraries' formation procedures, governance structures, local financing, and service area. This matrix classifies library agencies into one of four categories, based on their legal authority and administrative structure: county libraries, city libraries, independent special district libraries, and joint powers of authority (JPA) libraries. The chart also summarizes the provisions associated with each library type and notes additional variations that may occur within each category. For a list of the statutory code sections and constitutional citations for each type of library agency, see Appendix A, page 18.

Legal Authority

County Libraries

County libraries are organized under the County Free Library Law. In addition, the County Service Area (CSA) Law allows for the creation of a separate legal entity for library services, or a mechanism to provide financing flexibility within an existing county library system.

City Libraries

City libraries are organized under the Municipal Library Law or, for charter cities, under the constitutional "municipal affairs doctrine," and pursuant to a charter adopted by the city's voters.

Independent Special District Libraries

Independent special district libraries may be organized under the following laws:

- The Library District Law
- The Library and Museum District Law;
- The Union and Unified High School District Library District Law; and
- The Community Services District (CSD) Law.

Joint Powers of Authority (JPA) Libraries

Joint Powers of Authority (JPA) libraries are organized according to an agreement between the governing boards of two or more governmental entities, pursuant to the Joint Exercise of Powers Act.

Formation

County Libraries

Under the County Free Library Law, county supervisors must publish notice of their intent to establish a county free library system and must vote on the proposal at a public meeting.

To form a CSA, voters, landowners, or local officials must initiate the formation and the county Local Agency Formation Commission (LAFCO) must approve the proposal. In some cases, an election is required.

City Libraries

Under the Municipal Library Law, the city council can create a city library system by adopting an ordinance. If 25% of the city's voters petition to create a city library, council members *must* establish a library system.

Libraries in charter cities may also be formed according to the provisions contained within the city's charter.

A city cannot withdraw from a county library system to form its own municipal library before giving notice to the county board of supervisors (before January 1), negotiating a division of property tax revenues, and publishing two newspaper notices of its intent to withdraw.

Formation of a city library requires a city council vote at a public meeting.

Independent Special District Libraries

Although each law is unique, forming a new independent special district usually requires the following four steps:

- initiation by voters, landowners, or local officials;
- Local Agency Formation Commission (LAFCO) review and approval;
- a public protest hearing; and
- an election.

Joint Powers of Authority (JPA) Libraries

JPAs are formed when the governing boards of two or more governmental entities agree to jointly manage a library system. A JPA contract may be limited to certain organizational or operational aspects of a library system while also maintaining some separate functions within the participating entities, or it may form a new entity to handle all aspects of library organization and operation.

Governing Board

County Libraries

County supervisors govern libraries established under the County Free Library Law or as a CSA.

City Libraries

Libraries formed under the Municipal Library Law are managed by a five-member board of trustees appointed by the mayor or city manager, with the city council's consent. The city council may appoint its own members as the library trustees and then create an advisory board to help govern the library system.

Libraries formed according to a city charter are governed according to the provisions of the charter.

Independent Special District Libraries

Under the Library District Law, libraries are governed by a three- or five-member board of trustees which is directly elected by the district's voters.

Under the Library and Museum District Law, libraries are governed by a five-member board of trustees elected by the district's voters.

Under the Union and Unified High School District Library District Law, libraries are governed by the high school district's trustees.

Under the CSD Law, libraries are governed by a five-member board of directors elected by CSD voters.

Joint Powers of Authority (JPA) Libraries

The JPA contract specifies the structure and terms of the governing board.

For example, the Sonoma County Library JPA designates a seven-member library commission with five members appointed by the county Board of Supervisors, one member appointed by the Santa Rosa City Council, and one member appointed by the Petaluma City Council.

Advisory Board

In addition to the governing board that runs the library, many libraries also have a citizen advisory board that provides advice and assistance for library governance and operations

Local Financing for Operations

County Libraries

County library systems are divided into two separate categories for purposes of local operational funds: general fund libraries, and libraries with a dedicated property tax rate. This distinction is very important because it profoundly affects the amount and predictability of funds received by county library agencies.

County General Fund Libraries. The 22 county general fund libraries rely primarily on allocations from the county General Fund. Because of this, County General Fund libraries compete with other local service priorities, such as sheriff services, roads, and fire protection, for funding. To give libraries more certainty or increased revenues, county supervisors or voters may earmark a percentage of the county General Fund, or a portion of a particular local revenue source, for county libraries.

County Dedicated Property Tax Libraries. Twenty-four counties imposed a separate property tax for libraries before Proposition 13 (1978). This property tax rate still generates revenues, all of which are dedicated to county library services. Because a substantial portion of their revenues are guaranteed and cannot be spent on other county activities, county dedicated property tax libraries enjoy a greater degree of financial independence and certainty.

Voter-Approved Taxes. In addition to county libraries' reliance on the general fund or a dedicated property tax stream, their budgets can be increased by voter-approved special taxes for library services. All special taxes imposed specifically for library services, including sales, hotel, utility use, and parcel taxes (flat rate property taxes), require 2/3 voter approval. If a county's voters want to generate additional income for the county General Fund (for the support of any county function, and which may or may not be spent on libraries), the voters can impose the tax with a simple majority vote.

County libraries can also generate revenues by providing library services to other jurisdictions.

County Service Area (CSA) Funding. Though CSAs can be created as legally separate library providers, in practice, they are used to divide an existing county library system into different funding zones. Using a CSA, the county board of supervisors can propose a parcel tax within some or all of the library zones. After the election requiring a 2/3 vote, new and enhanced library services can then be targeted specifically to the zones that approved the taxes.

CSAs used for library funding rely primarily on special (parcel) taxes imposed within parts or all of their service area, but county supervisors can also allocate the local (non-property tax) revenues generated within the district's boundaries to the CSA.

City Libraries

Municipal libraries rely primarily on allocations from the city General Fund, competing with other local service priorities, such as police services, roads, and parks for funding.

City council members can fund library services from any source of revenue in the city General Fund. To provide greater resources or revenue certainty for libraries, city council members and voters can earmark a portion of the city's general revenues, or a portion of a specific revenue source, to support the city library. In charter cities, this earmarking can be placed into the city charter.

Council members may also ask voters to impose or increase taxes to provide additional revenues for the city library. If council members want to impose or increase a tax specifically for library services, including a parcel tax, 2/3 of the city voters must concur. If city voters want to generate additional income for the city general fund (for the support of any city activity, including libraries), the voters can impose the tax with a simple majority vote.

City libraries can also generate revenues by providing library services to other jurisdictions.

Independent Special District Libraries

Independent library districts usually receive a share of local property tax revenues based on historic allocations.

Library district governing boards may enhance local library funding by asking their voters to approve a special (parcel) tax for library service. Parcel taxes require 2/3 voter approval.

CSDs, like library CSAs in counties, are usually formed in areas with existing library services, as a way to divide library service areas into different funding zones in order to better target services to the communities that want additional or enhanced services and are willing to pay for them. Alternately, CSDs can be used as a mechanism to raise money to provide facilities or purchase services from other library entities. District libraries can also generate revenues by providing library services to other jurisdictions.

Joint Powers of Authority (JPA) Libraries

JPA libraries may be funded by any revenues streams available to its member agencies. Funding for JPA libraries is specified in the JPA agreement.

For example, the San Mateo County Library JPA is funded through a dedicated property tax rate imposed by the County in 1915, and also from state revenues, fines, fees, County contributions, gifts and grants, interest, and other sources that its member agencies allocate to the JPA.

Library JPA governing boards, if authorized in the enabling agreement, may enhance local library funding by asking voters to approve a special (parcel) tax for library service. Parcel taxes require 2/3 voter approval.

Library Generated Revenues

Most libraries of all types charge fines and fees for materials that are lost or returned late. Some libraries also engage in more entrepreneurial activity such as renting out meeting rooms and reception halls and selling library merchandise, like coffee mugs and book bags. Many libraries also seek and receive donations from Friends of the Library groups, library foundations, citizens, patrons, and businesses.

Capital Funding

County Libraries

To finance capital facilities, such as a new library building, a bookmobile, or large equipment purchase, county supervisors may ask the voters to approve a general obligation bond. General obligation bonds are secured by property taxes and require 2/3 voter approval.

In areas with significant growth, developer impact fees can also be approved by the governing board to finance the cost of the portion of the library that is attributable to the growth population.

Counties can also use other capital funding mechanisms such as revenue bonds, or direct allocations from other one time or ongoing revenue sources.

Counties can also use CSAs to divide the county into separate zones for general obligation bond proposals.

City Libraries

To fund capital facilities, council members can ask the city's voters to approve a general obligation bond. General obligation bonds require 2/3 voter approval.

In areas with significant growth, developer impact fees can also be approved by the governing board to finance the cost of the portion of the library that is attributable to the growth population.

Cities can also use other capital funding mechanisms such as revenue bonds, or direct allocations from other one time or ongoing revenue sources.

Independent Special District Libraries

Library district governing boards can propose a general obligation bond for funding library capital facilities. General obligation bonds require 2/3 voter approval.

Library CSDs can also create several different zones for general obligation bond proposals.

Joint Powers of Authority (JPA) Libraries

Depending on the specific authority provided in the Joint Exercise of Powers Agreement for each JPA, JPA governing boards can propose a general obligation bond for funding library capital facilities. General obligation bonds require 2/3 voter approval.

Service Area

County Libraries

County libraries serve unincorporated areas and cities, or areas within cities, which are neither served by a city library nor within the boundaries of independent library districts.

Cities and library districts can ask to become part of the county library system. A county library may also contract with cities or other counties to provide services. County libraries that contract to provide services to city residents are sometimes called city-county libraries.

Although in practice CSAs are used as a financing tool, they can provide separate library services and facilities throughout the boundaries set by the LAFCO during the CSA's formation. CSA boundaries can include all of the county's unincorporated area or just one or more small communities. Cities can pass a resolution asking to be included within a CSA's boundaries.

City Libraries

City libraries serve within the city's boundaries but can contract with neighboring cities or the county to provide services. City libraries that contract to provide services to county residents are sometimes called city-county libraries.

Independent Special District Libraries

Independent special district libraries provide service within the boundaries set by LAFCO at the time of their formation.

Library districts created under the Library and Museum District Law serve in unincorporated areas. This law also allows districts to contract with cities, counties, and other districts to provide services.

Library districts formed under the Library District Law and the Union or Unified High School District Library District Law may serve incorporated and unincorporated service areas (and need not be coterminous with the school district's boundaries). The districts may contract with neighboring city, county, and district libraries to provide services.

CSD libraries can serve in incorporated and unincorporated areas. CSD libraries may contract with other public agencies to provide services.

Joint Powers of Authority (JPA) Libraries

The JPA agreement designates the library service area. For example, the Santa Cruz City-County Library JPA specifies a service area that includes the County's unincorporated area and the cities of Capitola, Santa Cruz, and Scotts Valley, but not the City of Watsonville.

Examples

County Libraries

Libraries governed by the County Free Library Law include Alpine and Imperial Counties (general fund libraries), and dedicated property tax libraries in Fresno, and San Bernardino Counties.

In addition to their county free libraries, library CSAs exist in El Dorado and Solano counties and others to provide additional funding flexibility.

City Libraries

Municipal libraries include the Berkeley Public Library (Alameda County), the Los Angeles Public Library (Los Angeles County), and the Woodland Public Library (Yolo County).

The San Francisco Public Library is organized and operated under the City's charter, which reflects a consolidated city-county form of governance.

Independent Special District Libraries

Libraries formed as independent special districts include:

- The Palo Verde Valley Library District (Riverside County).
- The Buena Park Library District (Orange County).
- The Altadena Library District (Los Angeles County).

In addition, library CSDs exist in Glenn and Siskiyou counties to provide facilities or funding for library services provided by other library systems.

Joint Powers of Authority (JPA) Libraries

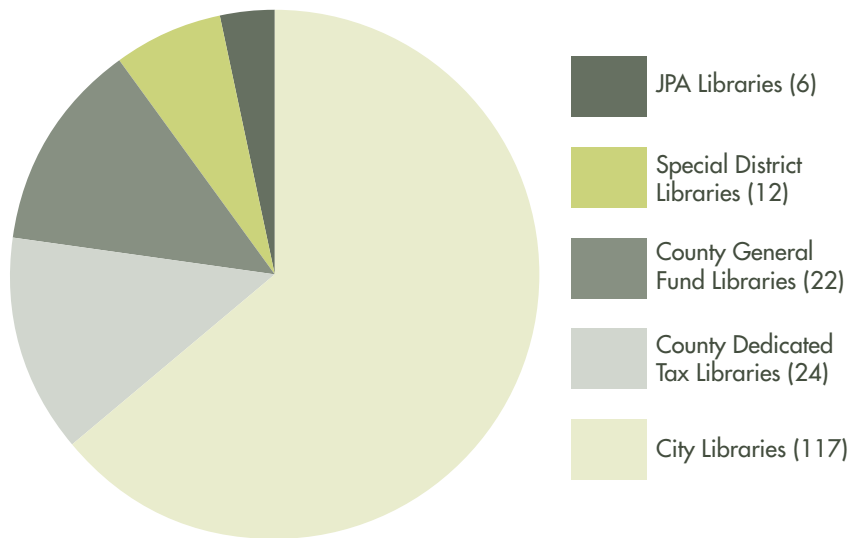
In addition to those JPA libraries previously mentioned, the Sacramento Public Library, the Santa Clara County Library and the Belvedere-Tiburon Library are JPA libraries.

LIBRARIES IN OUR COMMUNITIES: POPULATIONS SERVED, LOCAL FINANCING, AND EXPENDITURES, BY LIBRARY TYPE

California's 181 local public libraries serve over 37 million people. Libraries are organized in one of four different categories: county libraries, city libraries, independent special district libraries, and Joint Powers of Authority (JPA) libraries. A library's organization, coupled with its historical, political, and community influences, determines the library's service area, funding, and spending levels.

The following pages highlight the number and types of California local public libraries and examine the specific service areas, funding levels, and expenditure patterns associated with each library type. The accompanying charts and graphs allow readers to compare and contrast the characteristics and challenges that typify the different library types.

I. How Many Libraries and What Type?



Local Public Libraries by Type

city libraries, 46 county libraries (22 county general fund libraries, 24 county dedicated tax libraries), 12 independent special district libraries, and 6 JPA libraries. A complete list of local public libraries by type is found in Appendix B on pages 18 and 19.

For the most part, public libraries fall clearly within a single category, such as a municipal library formed to serve city residents, such as those in Berkeley and Long Beach, or a county library created to provide service to residents in unincorporated areas, as in Alpine and Trinity Counties. In some cases, however, a library's organization and operation is more complicated. For example, the Stockton-San Joaquin County Library provides library services to the City of Stockton and the County of San Joaquin with the City of Stockton as the operating entity and the County of San Joaquin contracting with the city for library services. Other organizational permutations are found throughout the state.

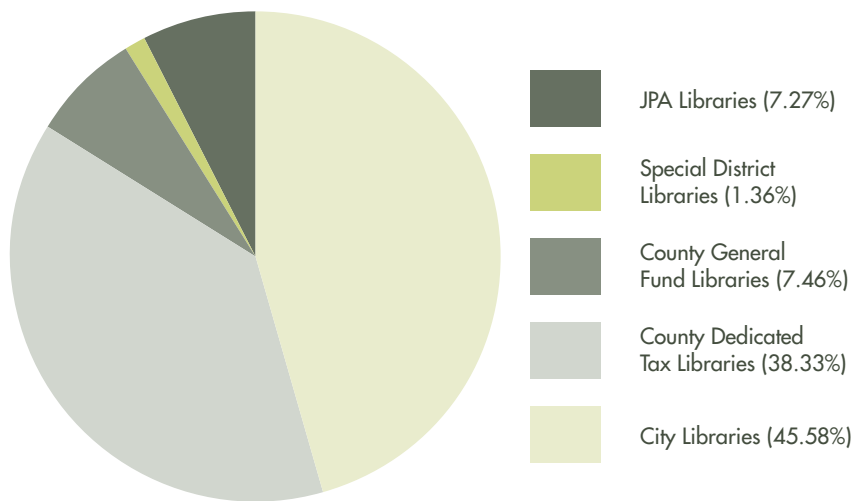
Given the limited number of statutory and constitutional options provided for local library organization, it is surprisingly difficult to quantify and classify the number and types of local libraries. The California State Library recognizes 181 distinct local public libraries agencies. Other local library agencies that exist are either obsolete, exercise a ministerial role in approving a contract with another library agency, or serve as a financing mechanism.

This document organizes local public library agencies into different categories depending on the library's underlying statutory or constitutional authority and the governing board that administers its operations.

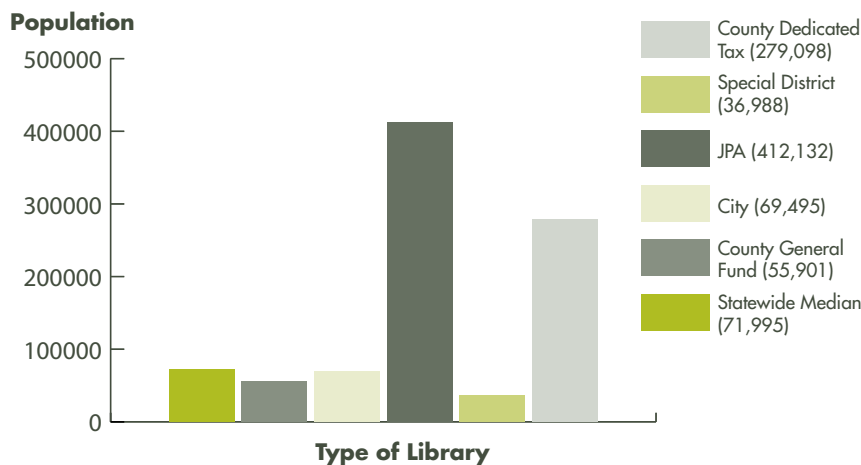
Using the state's list of local libraries, and applying this framework, there are: 117

II. Libraries and Their Communities

Each library's permissible service area is defined under the statutory authority used to create that type of library system. However, all library formation laws contain flexibility which allows libraries, once formed, to contract or combine with other agencies, including private entities, for the provision of library services. For a list of state laws and constitutional provisions authorizing the formation of library agencies, see Appendix A on page 18.



Percentage of State Population Served by Each Library Type



Median Population Served by Each Type of Library

In reality, library service areas are based on the library’s authorizing law, historical and political influences, and citizen preferences. For example, the Santa Barbara Public Library is organized under the city’s charter, but provides services by contract with surrounding communities. Alternately, in Glenn County, the Board of Supervisors pays other government entities to provide library services to local residents, rather than operating a county library system. For a list of libraries by type, see Appendix B on pages 18 and 19.

City and county library systems serve more than 90% of California residents, with each type of library serving about 45%. JPA and special district libraries provide services to a much smaller segment of the population: 7.27% and 1.36%, respectively.

Examining the median number of people served by each library type shows JPA libraries, which are regional by nature, have the biggest service populations (about 412,000 people per JPA library system). County dedicated tax libraries, with their relatively large boundaries, serve a median of 279,000 people. City libraries, with their relatively smaller boundaries, serve about 69,000 people, on median. And special district libraries, with their very small service areas, provide service to a median of only 37,000 people.

III. Focus on Local Funding

California libraries rely on a variety of federal, state, and local sources, as well as private contributions.

Federal funds come primarily in the form of grants to individual libraries that meet specified criteria. At the state level, the Public Library Fund (PLF) provides per capita allocations to public libraries and the California Library Services Act (CLSA) provides partial reimbursements for direct and interlibrary loans.

Locally, libraries receive revenues very differently depending on their type. City and county general fund libraries follow one pattern, while special district and county dedicated property tax revenue libraries tend to exhibit a different trend. JPA libraries generally include a blend of both funding patterns. Because there are two distinct financial patterns associated with the state’s 46 county libraries, the following discussion of revenues and expenditures examines county general fund libraries and county dedicated property tax libraries separately.

Allocations from Local Governments. City libraries and the 22 county general fund libraries depend primarily on allocations from local governments: the city council, in the case of cities, and the county board of supervisors, for county general fund library systems. Library allocations come from the city or county general fund. In most cases, this means that libraries must compete each year with other local services to obtain funds. In cities, libraries compete against overall public safety, parks, streets, and other programs.

In counties, the competition for resources is even greater; in addition to local county needs, federal and state government mandates require counties to spend significant percentages of their budget on national or state programs.

To give libraries some budget certainty, some city and county governing boards, or voters, have voted to set aside a portion of local revenues, such as a percentage of the general fund or a portion of their property tax revenues, exclusively for library purposes.

JPA libraries, made up of city and county members, also rely on city and county allocations for funding. A JPA contract may call for participating cities and counties to pay a certain amount annually, or it may require the city council or county board of supervisors to commit a certain revenue stream to the JPA library. As an example, for the Sacramento Public Library Authority, funding comes from an annual allocation from the City of Sacramento general fund, a City of Sacramento voter approved special tax for enhanced services in the City of Sacramento and a dedicated share of the property tax in the County of Sacramento for library services in the unincorporated area and other incorporated cities outside the City of Sacramento.

Dedicated Property Tax Revenues. Alternately, special districts and the 24 dedicated property tax libraries rely on the revenues generated from property taxes imposed prior to Proposition 13 (1978). These historical property tax revenues are restricted for library uses only. With this guaranteed revenue source, special district and county dedicated property tax libraries enjoy somewhat more predictable funding, regardless of other local needs and priorities. However, some of these libraries also receive some general fund revenues that can be affected by local economic conditions. In addition, these libraries have seen significant effects in their local property tax revenue allocations due to ERAF.

Voter-Approved Taxes. In addition to local government allocations and historical property tax rates, local libraries of all types also rely on voter-approved tax increases to expand library budgets. Revenue from local library tax measures constitutes a significant portion, and in some cases a majority, of local library funding.

Before the mid-1990s, some library funding measures required a simple majority vote or no vote at all. But in the mid 1990s, a series of court cases and Proposition 218 (1996) tightened the requirement for local tax proposals, requiring library revenue measures to achieve 2/3 voter approval and prohibiting the use of library property assessments that do not require voter approval.

Libraries are not only dependent on local voters' willingness to impose library taxes, but they are also dependent on the taxing authority and local tax base available to libraries of that type.

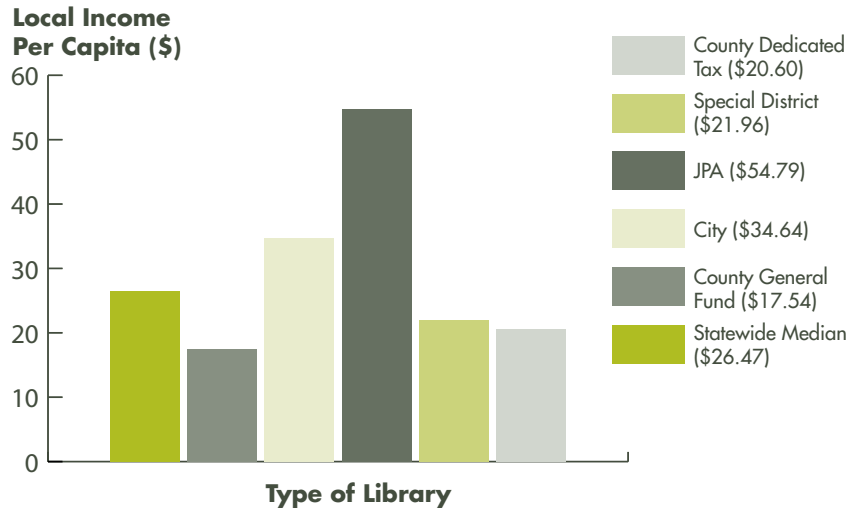
Cities and counties have the broadest taxing powers, with the ability to impose taxes on businesses, utilities, hotels, sales, property, and other sources to fund library services. This broad taxing authority can benefit city and county libraries that receive allocations from the city or county governments. And because cities and counties create and fund JPA libraries, these libraries also benefit from these broad taxing powers.

Complementing their broad tax powers is cities' expansive tax base. Cities also tend to have the most concentrated economic activity within their boundaries, and therefore, a more productive and diverse tax base. This tax base enables cities, and the JPAs in which they participate, to broaden and diversify their tax structure to produce the best mix and amount of revenues. Some urbanized counties also enjoy this robust tax base, whereas rural counties do not.

Conversely, library special districts have narrow taxing power and a limited tax base. Special districts rely almost exclusively on parcel taxes (flat rate property taxes) to support library operations. And since special districts tend to have smaller boundaries than other library agencies, there are relatively fewer parcels to tax.

Statewide, local library revenue per capita is \$26.47.

JPA libraries enjoy the highest per capita local revenues of all the library types at \$54.79 per capita. Several reasons may account for this. All JPAs have city participants and can therefore take advantage of the municipal taxing power and broader tax bases. Four of the six JPAs include the membership of county dedicated property tax libraries, which brings a guaranteed revenue source. The combination of multiple funding sources, large population base and some historically well funded libraries helps create the significant local funding base.



Median Local Income Per Capita by Each Type of Library

County libraries' per capita revenues are the lowest overall, with a substantial difference based on their financial status. County dedicated property tax libraries receive significantly more funds on a per capita basis (\$20.60 per capita) than county general fund libraries (\$17.54 per capita) that must face competing demands for the county's resources.

IV. Capital Costs

Libraries need to collect and house their materials. To provide, upgrade, and equip those facilities, they turn primarily to bond revenues.

At the State level, libraries have taken advantage of two state bond measures providing matching funds for public library construction and renovation. The State Library Bond Act Board provides 65% of a local project's costs, and the local jurisdiction provides the remaining 35% of the costs from their own funds. Proposition 85, a \$75 million bond approved by the voters in 1988, funded 24 libraries. Proposition 14, the California Reading and Literacy Improvement and Public Library Construction and Renovation Bond Act of 2000, authorized the sale of \$350 million of state bonds for public libraries and 45 library projects were funded.

Locally, library jurisdictions of all types enjoy the authority to issue general obligations bonds for capital expenditures. General obligation bonds, secured by ad valorem (value-based) property taxes, require 2/3 voter approval. Library jurisdictions use general obligation bonds to finance the acquisition and improvement of real property and to furnish and equip facilities.

In addition, in areas with significant growth, developer impact fees can also be approved by the governing board of a library to finance the cost of the portion of the library that is attributable to the growth population.

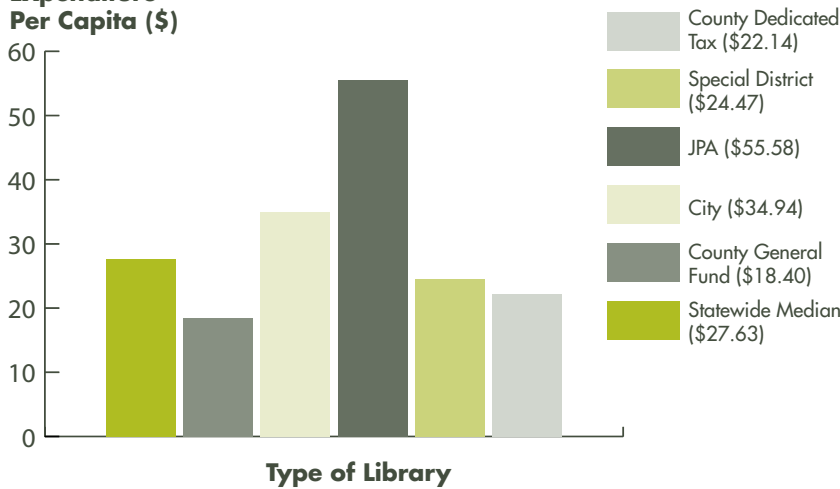
Cities and counties can also use other capital funding mechanisms such as revenue bonds, or direct allocations from other one time or ongoing revenue sources.

City libraries have the second highest per capita local income at \$34.64 per capita. City libraries' relatively high level of funding reflects their expansive tax powers and broad tax base. Support for libraries may also be stronger in cities because voters may view libraries as a core function of city government.

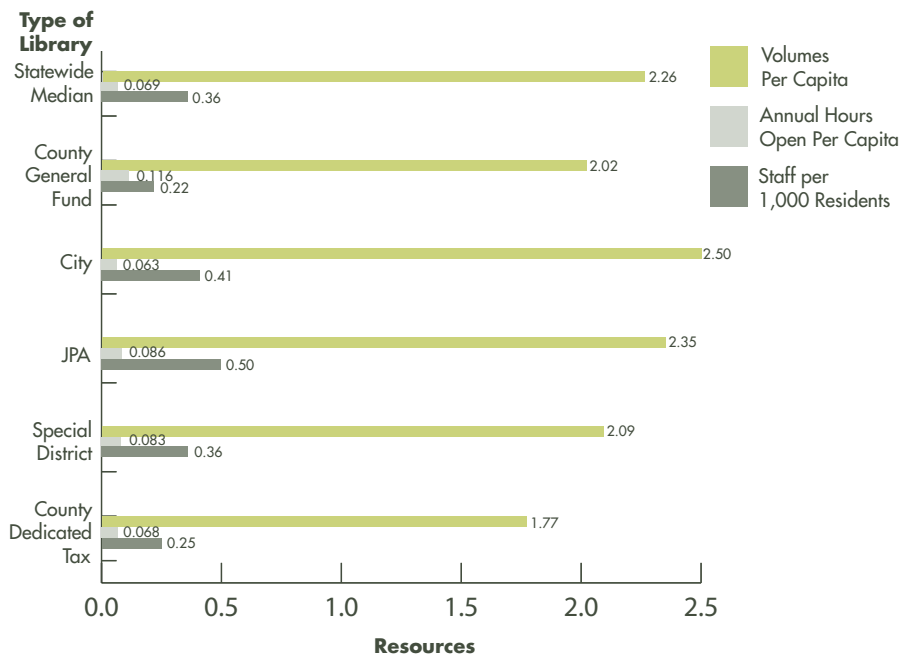
Special district libraries' per capita local revenues fall in the middle range of public libraries at \$21.96 per capita. District libraries benefit from a relatively small population (slightly more than 1% of the state) and few competing service demands, but are limited by their narrow taxing authority and base.

V. Examining Expenditures

Expenditure Per Capita (\$)



Median Expenditure Per Capita by Type of Library



Median Library Resources Per Capita by Type of Library

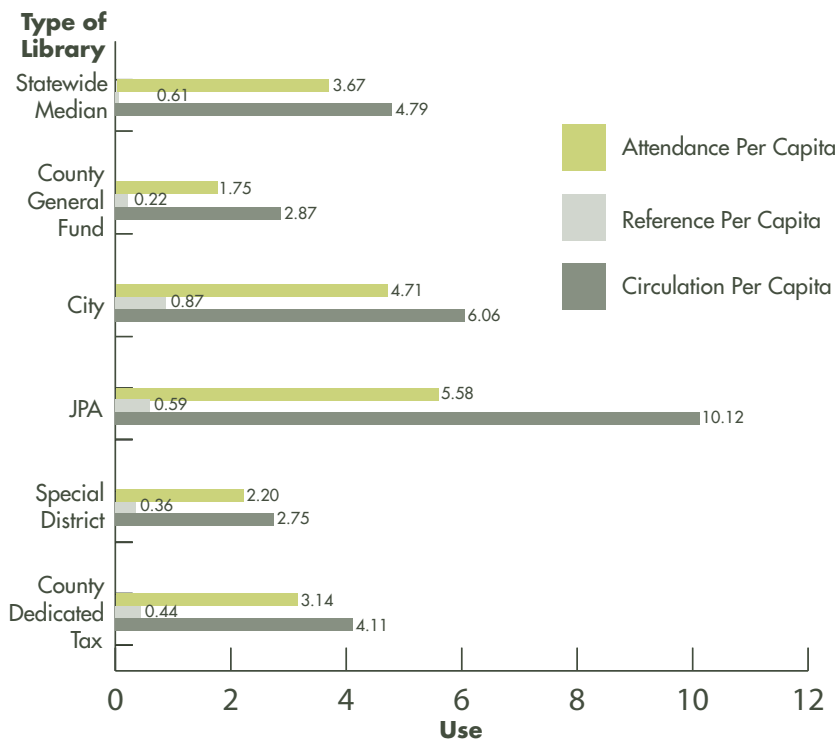
percentage of library card holders in city libraries may be a result of the higher funding and associated resources of city libraries, attracting users from surrounding, less well funded library jurisdictions.

Each library type has daily, operational expenses including employee salaries, materials, supplies, utilities, and other items. These expenditures are reflected in the number of service hours a library provides, the amount of materials available, and access to professional staff that shapes the community's library experience.

Libraries' per capita operational expenditure levels mirror the pattern established by per capita income with JPA and city libraries reaching the highest levels, special district and county dedicated property tax libraries spending the middle range, and county general fund libraries with the lowest per capita expenditures. This pattern is not surprising, for the more money a library can generate, the more it can spend in support of its activities.

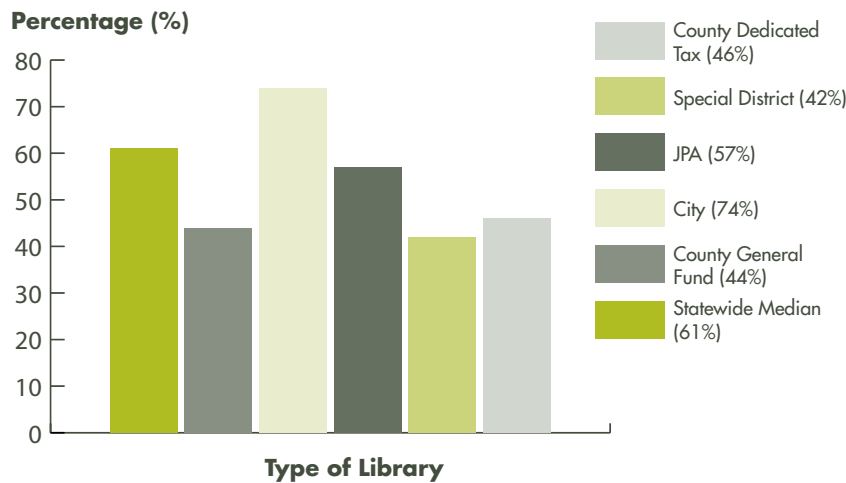
Library spending levels have a direct impact on the types and amounts of resources and services they provide, and the resulting use.

JPA and city libraries have the largest collections per capita, as well as number of open hours and staff. The resulting use levels reflect the resource levels, with city and JPA libraries again having the highest circulation and reference use per capita. However, city libraries show a much higher percentage of the population holding library cards than any other type of library. However, under California's universal borrowing system, library users are not necessarily residents of the library jurisdiction from which they hold a library card so the higher



In addition to libraries' operating expenses, they also have capital costs, including expenses associated with land, buildings, remodeling, vehicles, and equipment that costs more than \$5,000. Libraries finance their capital costs with a mix of state bond funds, allocations from local governments (for city, JPA, and county general fund libraries), and bonds approved by the voters. Local capital expenditures for libraries are difficult to quantify and compare since they are not accounted for or reported uniformly across the state. In city, county, and JPA libraries, capital spending is sometimes accounted for in the larger city or county budget, making comparisons between library capital spending more challenging and less useful.

Median Library Use Per Capita by Type of Library



Median Percentage of Residents Who Have Library Cards by Type of Library

FY 05/06 TYPE OF LIBRARY COMPARATIVE DATA

Type/Population

	Number of Libraries	Population		% of State Population Served
		Median	Range	
State	181	71,995	1,241 – 3,976,071	
County General Fund	22	55,901	1,241 – 779,869	7.46%
County Dedicated Tax	24	279,098	13,597 – 3,644,424	38.33%
JPA	6	412,132	10,954 – 1,316,162	7.27%
City	117	69,495	1,559 – 3,976,071	45.58%
Special District	12	36,988	18,337 – 81,349	1.36%

Funding/Expenditures

	Local Income Per Capita		Total Expenditures Per Capita	
	Median	Range	Median	Range
State	\$ 26.47	\$ 3.37 – \$ 270.22	\$ 27.63	\$ 4.85 – \$ 300.99
County General Fund	\$ 17.54	\$ 6.08 – \$ 224.93	\$ 18.40	\$ 6.46 – \$ 214.25
County Dedicated Tax	\$ 20.60	\$ 8.20 – \$ 67.18	\$ 22.14	\$ 9.13 – \$ 74.64
JPA	\$ 54.79	\$ 6.99 – \$ 102.07	\$ 55.58	\$ 20.76 – \$ 125.00
City	\$ 34.64	\$ 3.37 – \$ 270.22	\$ 34.94	\$ 6.89 – \$ 300.99
Special District	\$ 21.96	\$ 4.51 – \$ 75.86	\$ 24.47	\$ 4.85 – \$ 75.04

Resources

	Staff per 1,000		Hours Open per Capita		Volumes per Capita	
	Median	Range	Median	Range	Median	Range
State	0.35	0.07 – 2.82	0.07	0.01 – 2.39	2.26	0.83 – 21.22
County General Fund	0.22	0.08 – 2.82	0.12	0.02 – 2.39	2.02	1.07 – 14.75
County Dedicated Tax	0.24	0.10 – 0.66	0.07	0.03 – 0.64	1.77	0.83 – 8.47
JPA	0.49	0.19 – 1.17	0.09	0.04 – 0.28	2.35	1.67 – 6.89
City	0.40	0.09 – 2.77	0.06	0.01 – 1.58	2.50	0.78 – 21.22
Special District	0.35	0.07 – 0.77	0.08	0.03 – 0.18	2.09	1.08 – 3.87

Use

	Circulation per Capita		Reference per Capita		Attendance per Capita		% of Residents Who Are Registered Borrowers	
	Median	Range	Median	Range	Median	Range	Median	Range
State	4.79	0.63 – 10.46	0.61	0.02 – 11.21	3.67	0.60 – 25.21	61%	13% – 239%
County General Fund	2.87	0.63 – 17.93	0.22	0.02 – 1.27	1.75	0.76 – 11.51	44%	17% – 83%
County Dedicated Tax	4.11	1.05 – 10.46	0.44	0.09 – 1.06	3.14	0.79 – 9.87	46%	26% – 98%
JPA	10.12	4.27 – 22.95	0.59	0.36 – 2.68	5.58	2.10 – 7.36	57%	30% – 90%
City	6.06	0.65 – 40.58	0.87	0.09 – 11.21	4.71	0.60 – 25.21	74%	22% – 239%
Special District	2.75	0.74 – 12.64	0.36	0.04 – 1.55	2.20	1.62 – 9.30	42%	13% – 72%

APPENDIX A: CONSTITUTIONAL AND STATUTORY PROVISIONS AUTHORIZING LOCAL PUBLIC LIBRARY ORGANIZATION

Charter City “municipal affairs doctrine”	California Constitution, Article II, §3
Community Services District Law	Government Code 61000 et seq.
County Free Library Law	Education Code §19100 et seq.
County Service Area Law	Government Code §25210.1 et seq.
Joint Powers of Authority Law	Government Code §6500 et seq.
Library District Law	Education Code §19400 et seq.
Library and Museum District Law	Education Code §19600 et seq.
Municipal Library Law	Education Code §18900 et seq.
Union and Unified High School District Library District Law	Education Code §18300 et seq.

APPENDIX B: CALIFORNIA PUBLIC LIBRARIES BY TYPE

County Libraries (46)

Alameda County*	Madera County	San Diego County*
Alpine County	Marin County*	San Luis Obispo County*
Amador County	Mariposa County	Siskiyou County
Butte County*	Mendocino County*	Solano County*
Calaveras County	Merced County	Stanislaus County
Colusa County	Mono County*	Stockton-San Joaquin County*
Contra Costa County**	Monterey County*	Sutter County
El Dorado County	Modoc County	Tehama County
Fresno County*	Napa County*	Trinity County
Humboldt County*	Nevada County	Tulare County*
Imperial County	Orange County*	Tuolumne County
Inyo County	Placer County*	Ventura County*
Kern County	Plumas/Sierra County	Yolo County*
Kings County*	Riverside County*	Yuba County
Lake County*	San Benito County	
Los Angeles County*	San Bernardino County*	

* = dedicated property tax libraries (see page 7).
 ** = operated as a dedicated property tax library.

Municipal Libraries (117)

Alameda	Livermore	Richmond
Alhambra	Lodi	Riverside
Anaheim	Lompoc	Roseville
Arcadia	Long Beach	Salinas
Azusa	Los Angeles	San Anselmo
Benicia	Los Gatos	San Bernardino
Berkeley	Menlo Park	San Bruno
Beverly Hills	Mill Valley	San Diego
Brawley	Mission Viejo	San Francisco
Burbank	Monrovia	San Jose
Burlingame	Monterey	San Juan Batista
Calabasas	Monterey Park	San Leandro
Calexico	Moorpark	San Marino
Carlsbad	Moreno Valley	San Mateo
Carmel	Mountain View	San Rafael
Cerritos	Murrieta	Santa Ana
Chula Vista	National City	Santa Barbara
Colton	Newport Beach	Santa Clara
Commerce	Oakland	Santa Fe Springs
Corona	Oceanside	Santa Maria
Coronado	Ontario	Santa Monica
Covina	Orange	Sausalito
Daly City	Orland	Sierra Madre
Downey	Oxnard	Signal Hill
El Centro	Pacific Grove	South Pasadena
El Segundo	Palm Springs	South San Francisco
Escondido	Palmdale	St. Helena
Folsom	Palo Alto	Sunnyvale
Fullerton	Pasadena	Thousand Oaks
Glendale	Paso Robles	Torrance
Glendora	Pleasanton	Tulare
Hayward	Pomona	Upland
Hemet	Porterville	Vernon
Huntington Beach	Rancho Cucamonga	Victorville
Imperial	Rancho Mirage	Watsonville
Inglewood	Redding	Whittier
Irwindale	Redlands	Willows
Larkspur	Redondo Beach	Woodland
Lincoln	Redwood City	Yorba Linda

Independent Special District Libraries (12)

Altadena Library District	Beaumont Library District	Dixon Public Library District
Banning Unified School District Library District	Buena Park Library District	Lassen Library District
Blanchard/Santa Paula Public Library District	Coalinga-Huron Unified School District Library District	Palo Verde Valley Library District
	Del Norte County Library District	Palos Verdes Library District
		Placentia Library District

JPA Libraries (6)

Belvedere-Tiburon Library	Santa Clara County Library
Sacramento Public Library	Santa Cruz Public Libraries
San Mateo County Library	Sonoma County Library

