

**LIBRARY COMMISSION
AGENDA REPORT**

January 7, 2021
Item 5

SUBJECT: REVIEW AND DISCUSS STATUS UPDATES ON FINES FREE AND MATERIALS RECOVERY POLICIES AT THE PLEASANTON PUBLIC LIBRARY

SUMMARY

In July 2019, City Council adopted a materials recovery model for the Pleasanton Public Library (PPL) that eliminated daily library overdue fines (“Fines Free”), introduced the automatic renewal of materials, and continued charges for lost or damaged library items. When the resolution updating the Master Fee Schedule for the library was adopted, City Council requested a status update at a future date. City staff has gathered and analyzed data and community feedback for the six (6) months following the resolution up until the COVID-19 facility closure, to evaluate access to materials, community outcomes and the financial impact of the resolution.

RECOMMENDATION

Review and discuss status updates on the Fines Free and Materials Recovery policies at the Pleasanton Public Library.

FINANCIAL STATEMENT

There was an anticipated reduction in daily overdue fines revenue totaling \$50,603 for FY 2019/2020. The reduction in revenue is due in its entirety to the elimination of overdue fines. To address the reduction in revenue, the FY 2019/20 budget included no growth in the library’s staffing budget and minor adjustments to program expenditures to offset the loss in revenue.

REVENUE IMPACT Data Field	09/18-02/19	09/19-02/20	Percent Change
Overdue Fines/ Lost and Paid Items (Combined Revenue)	\$58,106	\$7,503	-87%

In the six (6) months following the shift to a Fines Free and Materials Recovery model, the number of lost library materials decreased, City assets were maintained, and fewer library users were sent to the collection agency, Unique Management Services.

LOST MATERIALS Data Field	09/18-02/19	09/19-02/20	Percent Change
Number of Accounts Impacted	210	134	-36%
Value of Assets	\$1,892	\$1,266	-33%

BACKGROUND

Following the recommendation of the Library Commission, City Council adopted a Materials Recovery policy which updated the Master Fee Schedule for PPL in July 2019. The Materials Recovery model represented a shift in focus away from daily overdue fines, while still focusing on getting materials back in a timely fashion. This was done through the elimination of daily overdue fines, the automatic renewal of materials, and the continuation of existing charges for lost or damaged items. The goal was to remove unnecessary barriers for all members of the community and increase access, checkouts and recovery of materials.

Staff gathered and analyzed comparative data and community feedback for six (6) comparative months.

LIBRARY ACTIVITIES Data Fields	09/18-02/19	09/19-02/20	Percent Change
New Library Cards (Registrations)	7,514	9,236	23%
Physical Checkouts	525,679	587,903	12%
Digital Checkouts	47,996	87,322	82%
Number of Visitors (Gate Count)	277,275	269,202	-3%
Wireless Sessions (On Site Use)	27,075	28,717	6%
Turnover Rate of Materials	3.10%	3.23%	4%

Analysis of Data

- **23% increase in new library cards.** Multiple factors contributed to an increase in new library users. The Student Success Initiative provided library card access for PUSD high school and middle school students. The promotion of the library at community events generated new users. Successful Facebook and email marketing and promotions sparked renewed interest in obtaining a library card by patrons who may not have obtained a card due to concerns about managing fines and fees.
- **12% increase in physical checkouts.** A 12% increase in physical materials checkout can be attributed to offsite promotion of the library at community events and library card registration and an increased number of cardholders.
- **45% increase in digital materials checkouts.** Offsite program promotion for new popular digital services (Pressreader, Kanopy).
- **4% increase in the turnover rate of materials.** There have been questions about whether eliminating fines and providing auto renewals would slow down access to materials. An increase in the “turnover rate” (a marker for how frequently items are returned and checked out) reveals this is not the case, and materials are going out faster than in the prior period.
- **Number of library visitors remained stable.** There was a modest decrease of 3% in library visitors. Due to library construction, all programs were off-site beginning September 2019. This decrease is statistically small, considering the number of visitors that attend children’s programs and story times. In the absence of on-site programs, there was an increase in library traffic to conduct business unrelated to programs.

DISCUSSION

Turning negative transactions into positive interactions has a positive impact on the perception and impact of the library in the community.

Creating Positive Interactions

When daily overdue fines were eliminated in July 2019, PPL had 14,601 members with unpaid overdue fines on their account (11,720 adults and 2,881 children). A total of 539 of those members (410 adults and 129 children) had blocked library accounts due to unpaid bills on their account exceeding \$20, leaving them without access to materials and resources. Eliminating overdue fines encouraged users to return to the library. Library staff at each of the three public service desks have reported members of the community expressing thanks that they could return and check out books again.

Community feedback has been extremely positive, and while this is challenging to measure in numbers, the staff has received frequent feedback from patrons in person, on the phone and through email that reflects appreciation of the changes.

- Families have shared with staff the economic hardship of overdue fines. One mother commented: "I am glad my son can use his library card again. He had so many fines that I took away his card. He couldn't come to the library for some time. Now he is glad too that he can visit the library again."
- Existing overdue fines were purged from the database, leading a patron to visit the library and comment, "I'd like to renew my library card because I saw that I didn't have any more fines."
- Email Comment: "Great gesture. I highly appreciate the decision. Thank you very much."
- Email Comment: "I am so pleased. Our family loved reading but with little kids we tend to not return the books on time sometimes and get fines. That's the reason we haven't been visiting the library. I'm so excited we can go back to the library now! Many thanks."
- Email Comment: "This is WONDERFUL!!! Great job with the new policy!!"
- Email Comment: "Thank you 😊😊😊👍👍👍👍"

Reduction of Staff Time Spent Managing Overdue Fines

A direct benefit of the elimination of daily overdue fines is a reduction of the number of staff transactions managing fines and fees. The impact of overdue fines heavily impacted City staff as the PPL averaged 18,655 transactions per year processing overdue library fines. Each transaction took significant time and created a negative interaction with the library customer. Staff transactions handling overdue fines have decreased by 90% in the six-month period measured, with 68% less members impacted.

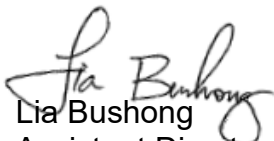
Staff Transactions	09/18-02/19	09/19-02/20	Percent Change
Fines and Fees transactions (Total)	39,381	3,694	-90%
Fines and Fees transactions (# Users)	4,749	1,501	-68%

Shifting focus from the collection of daily overdue fines to materials recovery has freed up staff for more positive interactions with community members. City staff has noted the additional assistance they have provided utilizing time saved in managing overdue fines.

- **Faster service at the front desk (Member Services).** Fines take significant time to discuss and process and must be inputted in both in the Sierra library management platform and Tyler Munis cashiering. Single transactions take 5-7 minutes each. Staff now has capacity to move through the checkout line much more quickly and pleasantly.
- **Assistance with library technology.** Staff now has increased capacity to help patrons with the self-checkout machines.
- **Answering incoming phone calls faster.** Discussion of overdue fines on phone calls can take from 7-10 minutes per transaction. Staff now has capacity to more readily answer community calls and provide more efficient service.
- **Meeting the needs of library users with medical restrictions.** Staff has cited instances of being able to walk to the book stacks and spend time with patrons who are utilizing a wheelchair or assistive device.
- **Filling holds sooner.** Staff can step away and take extra time to shelve holds for patrons waiting to pick up.
- **Introducing the library fully to new users.** Procedures like booking meeting rooms or study rooms, using a copier or printer, providing information in multiple languages, or sharing the value of a library card and the services of PPL are now more available to patrons.

In an effort to align current Pleasanton Public Library practices with strategic goals and objectives, City staff conducted extensive research on materials recovery. At the six (6) month mark, data and community feedback reflect an increase in the circulation, access and recovery of the vast materials and resources it has to offer, while eliminating barriers to usage.

Submitted by:



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