



City of Santa Barbara

DATE: December 6, 2021

TO: City of Goleta Library Advisory Commission Members

FROM: Rebecca Bjork, Interim City Administrator, City of Santa Barbara *RJB*

SUBJECT: Response To Agenda Item B.2: Goleta Valley Library, Black Gold Cooperative Library System: History and Current Events

It has come to the attention of the City of Santa Barbara that there are discrepancies being presented to the Goleta Library Advisory Commission at the December 6, 2021 meeting regarding Agenda Item B.2.

Below is the City of Santa Barbara Public Library's (hereinafter Santa Barbara) response to address the discrepancies presented and afford the Commission an opportunity to have all the facts regarding this item:

Pertinent Background Information:

Santa Barbara has been open for quite some time of its intention to move to a new ILS to improve patron and staff experience. In fact, there are documents going all the way back to 2016, where Santa Barbara has discussed making this move along with additional documents dating back to 2013 where the cooperative discussed enhancements to ILS. We are happy to provide supporting documentation, which includes Meeting Minutes from the Black Gold Admin Council, Black Gold Reference and Adult Services Committee, Black Gold Automation and Technical Services Operations Committee, County Library Advisory Committee, City of Santa Barbara Library Board and City of Santa Barbara City Council.

It is evident that the move to Koha stems from a culmination of issues that originated all the way back to 2013. Santa Barbara has been very transparent about its dissatisfaction of the ILS system for its patrons and staff and the history on this issue shows that Santa Barbara has not "reversed course" in any way nor mislead anyone.

In addition, it is also important for the Commission to understand some of the reasons why this decision is being made. A cost benefit analysis completed within our jurisdictions (with Black Gold staff input) concluded that having a separate ILS allows for significant improvement in the local control of costs, catalog and patron management, and reporting of collection usage. Santa Barbara and SLO would continue to share their collections with Black Gold consortia members, giving the patrons of each jurisdiction access to over \$1.3 million of new materials in FY 21/22 alone. While we understand that separate instances of Koha/Aspen currently prevent patrons from placing holds on materials, it also provides an opportunity for our staff to provide better service by: 1) ensuring patrons are finding and selecting the titles they desire as opposed to mistakenly choosing the wrong edition; 2) allowing for staff to suggest other titles to patrons while they are waiting for holds to be filled; and 3) providing insights into holes in our collections where we need to purchase items that we may have missed. Our respective

Libraries are committed to resource sharing. Moreover, Santa Barbara will look to implement the return of a patron-based hold process as the Aspen technology is updated.

Santa Barbara also would like to point out some areas of concern we have had with the ILS system. In 2019, Black Gold consulted with Susan Hildreth, previous State Librarian, and found the following areas in need of review and analysis:

- Some Directors have questions and concerns about the ILS and the value of resource-sharing (Santa Barbara did not commit to the ILS as a core function),
- Individual library branding/identity,
- Several Directors want access to the back-end system and the ability to access better data,
- Some Directors saw the vote to stay with Polaris instead of Koha as a missed opportunity for a better customer and staff experience,
- Addressing the need for a cost/benefit analysis of sharing print materials and the recommendation of providing flexibility for member libraries who may or may not want to participate,
- Addressing the issue that some of the smaller jurisdictions lack the funding, expertise, and/or capacity to manage their own ILS and that different libraries require different levels of service from Black Gold (i.e. there is a need for a service level agreement between Black Gold and member libraries that provides clarity on response times, clear priority for service requests, etc.)

The analysis highlighted that director concerns about the ILS and resource-sharing were pressing and needed to be addressed as soon as possible. To date, there has been no agreement amongst Black Gold members on what constitutes core services, despite being clearly raised in Ms. Hildreth's summary.

Sharing of physical resources:

The Santa Barbara Public Library and San Luis Obispo County Libraries were willing to share resources but simply want to install their own instances of the ILS. When Ventura and Thousand Oaks were part of Black Gold, they did not pay for the ILS but were members of the Cooperative at a different tier. Therefore, it is not unprecedented for Santa Barbara and San Luis Obispo to be permitted to have their own instances of Koha **and** participate in the Black Gold Cooperative at a different membership tier that would not require them to pay for the Koha installation and maintenance for the other Black Gold jurisdictions. Santa Barbara and San Luis Obispo have the budget and staff to manage their own Koha installation, making it more cost effective and a better experience for their staff and the public to manage and utilize library services.

Furthermore, our current version of traditional ILL does cost a minimum of \$15 but that would not be the case when Santa Barbara and San Luis Obispo have their own instances of Koha since the different instances can communicate with one another. The way that resource sharing would be done between jurisdictions has not been officially discussed by Black Gold libraries but ByWater has communicated that staff-initiated ILL between different instances of Koha would not incur any extra charges for using the staff-initiated ILL that is in Koha. Holds placed by staff have no transaction fees. Therefore, the \$15 per item statements are entirely false. A vendor enhancement is currently in development to create a patron initiated holds mechanism that would result in resource sharing as we know it today.

Finally, shipment of materials from one jurisdiction to another is not paid in full by funds from the CA Library Services Act to Black Gold. The CA Library Services Act does not cover cost of staff to sort and otherwise process and prep materials for shipment. Santa Barbara's cost benefit analysis determined that shipping materials to other Black Gold jurisdictions costs roughly \$120,000 annually. The act also does not cover driver/courier costs for Santa Barbara to send materials to the Eastside, Montecito, or Carpinteria branches.

Digital resources:

The content on the Goleta Library presentation to the Goleta Library Advisory Commission on the slide titled "Digital Resources" is inaccurate. Santa Barbara initiated the move to Overdrive and trained Black Gold libraries on using Overdrive. When it comes to the WiFi hotspots, Santa Barbara did the research on which hotspot provider to use for the entire cooperative. Furthermore, Santa Barbara manages their own contracts with these vendors (i.e. Overdrive, Hoopla, the databases available from the CA State Library). The libraries have to talk to these vendors and deal with technical issues, etc. Black Gold does not handle these technical issues. While Black Gold takes care of paying for regular Overdrive, Santa Barbara pays for Overdrive Advantage titles separately and pays for their own Hoopla (and does not go through Black Gold) as the maintenance and support for digital items is the responsibility of the owning Library. Santa Barbara's position is that all State Library money should go towards Overdrive as that would not require shipment of physical materials, then savings could be placed in to the local print collection.

The content on the slide "Professional Digital Resources" is also inaccurate. Santa Barbara has spearheaded initiatives to improve Overdrive usage and trained other Black Gold libraries on best practices for using the system. These initiatives included researching and advising other Black Gold libraries to use Quipu. Also, automated notification of holds and over dues has always been part of Polaris ILS and not initiated by Black Gold.

Finally, Santa Barbara would like to address the slide entitled "Access to Materials". The shared catalog is separate from sharing e-materials and Santa Barbara has historically been a net lender, not a net borrower. Therefore, our patrons would not lose access to 830,000 items because Santa Barbara owns most of these items.

Administration of the ILS:

The 2019 report from Susan Hildreth points out the need to address the issue that some of the smaller jurisdictions lack the funding, expertise, and/or capacity to manage their own ILS and that different libraries require different levels of service from Black Gold (i.e. there is a need for a service level agreement between Black Gold and member libraries that provides clarity on response times, clear priority for service requests, etc.).

This goes to the heart of the frustration for Santa Barbara, which has repeatedly had to fix and take care of issues as Black Gold is not always available nor do they always have the expertise to handle certain issues that have arisen.