



City of Lodi

Lodi Public Library Assessment

December 5, 2024





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Mr. Scott Carney
City Manager
City of Lodi
221 W. Pine Street
Lodi, CA 95240

Baker Tilly Advisory Group, LP
2570 W El Camino Real, Suite 640
Mountain View, CA 94040
+1 (949) 809-5588
bakertilly.com

Dear Mr. Carney:

Baker Tilly is pleased to transmit our report evaluating the Library's current operations and service delivery and comparing it with other service delivery models used by San Joaquin County and the City of Stockton.

The report presents our observations and a set of proposed recommendations to enhance the Library's effectiveness and sustainability and explores other options for providing this critical service to the community.

We wish to thank City staff for providing us with a variety of information and having candid discussions with our team members to inform this assessment. Their cooperation and insights have been invaluable in shaping our understanding of the department's operations and challenges.

We believe that the recommendations outlined in this report will provide a solid foundation for you, the City Council, and the community to consider as you continue to work toward providing the services the residents of your community deserve.

Thank you once again for the opportunity to collaborate on this important initiative. We look forward to discussing the report's findings and recommendations with you.

Sincerely,

A handwritten signature in blue ink that reads "Carol Jacobs".

Carol Jacobs, Managing Director
Baker Tilly Advisory Group, LP
+1 (949) 809-5588 | carol.jacobs@bakertilly.com

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Executive Summary

The City of Lodi (City) engaged Baker Tilly to assess the Lodi Public Library's (Library) operations and service delivery, with a focus on how the Library can remain sustainable given changes in demographics, service needs, and fiscal constraints. This assessment includes an analysis of the costs, staffing levels, administrative structure, and services of the Library, followed by a discussion of three alternatives for library service delivery and 18 recommendations that the City can pursue pending further direction provided by the City Council, Board of Trustees, and other decision-making bodies.

The results of our assessment indicate that the Library is a valued resource that is making strides in adapting to the needs of modern society. Improvements to the Library's physical space, restoration of materials funds, and an active Board of Trustees, Foundation, and Friends group demonstrate a high level of commitment and energy to Library services. However, this positive trajectory is thwarted by staffing challenges, a continued lack of space for events, unmet program needs, and a growing structural deficit in the City budget that will require the involvement of all departments to address.

The three alternatives to address these issues include:

1. Making changes to the existing department structure and services.
2. Pursuing a combined department with the Parks Recreation and Cultural Services Department (PRCS).
3. Joining the neighboring Stockton San Joaquin Public Library System (SSJCPL).

Each alternative has its benefits and drawbacks, and this assessment is meant to be a starting point for further conversations within the City. Once there is a clear direction, the desired alternative will require further analysis and planning before implementation. Our assessment is intended to give the City a perspective on current operations and provide options for sustainable and long-term library services to the residents of Lodi.

To achieve the goals of this project, Baker Tilly reviewed a substantial amount of data provided by Lodi staff and interviewed a cross-section of employees and departments with working knowledge of both the Library and of models for the provision of library services in San Joaquin County and neighboring areas. Those interviewed included City staff, Library staff, members of the Lodi Board of Library Trustees, the President of the Lodi Library Foundation, the President of the Friends of the Library and staff from the City of Stockton and the County of San Joaquin.

Summary of Observations – Current State

Staffing: Departmental structure alignment and position allocations

- The reduction in professional Library staff has resulted in operational challenges and succession planning issues.
- The heavy reliance on part-time staff has resulted in service delivery and retention challenges.
- Misaligned qualifications and vague education and experience qualifications contribute to recruitment issues.
- Professional behavior between staff members is inconsistent, resulting in low morale.
- Analysis of comparative salary data for library systems in the region shows that Lodi offers competitive wages and benefits.

Programming: Number and type of program offerings in response to community need

- Although the Library has invested significant resources in making physical improvements to the facility, there is still a lack of space for the desired level of programming.

- The Library operates from a more traditional collection-based focus rather than a contemporary philosophy that prioritizes programming, fewer books, more space, and curated educational experiences.
- Library programming has not adapted to support wider community needs.

Fiscal and Operational Considerations

- The Lodi Library budget is higher than neighboring libraries with similar service levels, potentially from a lack of economies of scale efficiencies available in comparable settings.
- The Library will continue to face fiscal constraints over the long term.
- There are governance challenges with the way current responsibilities are shared between the Board of Trustees and The City Manager.
- The Library has outdated technology that impacts service delivery.
- Like other public institutions across the country, the Library struggles to adequately address homelessness.

Summary of Observations – Future State Alternatives

The Baker Tilly team developed three alternatives for the City's consideration to more fully meet the community's needs. The report fully describes these alternatives and provides recommendations on issues to be addressed.

1. **Change Existing Department Structure and Services:** The Library could be improved structurally and programmatically by modernizing operations, providing clarity for the staff, and enhancing programming.
2. **Combine the Library with the Parks, Recreation, and Cultural Services Department:** The Library is a small operation with several challenges. Combining the operation with another larger department would reduce staff duplication, provide more space for programming, and allow for joint programming.
3. **Join the Stockton San Joaquin County Public Library System:** The Stockton San Joaquin County Public Library System is comprised of 16 libraries. By combining with the system, the City of Lodi could negotiate additional programming and possibly reduce the operation's expenses through economies of scale efficiencies.

Project Scope and Methodology

The City of Lodi (City) engaged Baker Tilly to assess the Lodi Public Library's (Library) current operations and service delivery, with a focus on how the Library can remain sustainable given changes in demographics, service needs, and fiscal constraints. With the recent departure of the Library Director and recurring attrition in the role, the City Manager wanted to develop a comprehensive understanding of the Library's current state to understand how effective the service model is and how it compared to other libraries, particularly the model used by San Joaquin County and the City of Stockton. In addition, based on the results of the assessment, the City Manager wanted to know if there were alternatives to the current model that might be worth investigating to ensure that the Library would be programmatically and financially sustainable for the foreseeable future.

As part of our analysis, Baker Tilly consultants completed the following activities:

- Interviewed a total of 21 people. Those interviewed included four City of Lodi staff, five Library Trustees, the President of the Library Foundation, the President of the Friends of the Library, three City of Stockton staff and one staff member from San Joaquin County. Copies of the interview questions were also sent to line staff at the Lodi Library for written responses, and six were received.
- Reviewed budget, staffing and program data provided by the City of Lodi, the City of Stockton and San Joaquin County staff.
- Reviewed relevant Library policies, procedures, and processes, with additional details clarified through discussions with Library staff.
- Developed observations and conclusions from these activities to establish a baseline of common Library operations.
- Developed 18 recommendations for further investigation of three service alternatives.

Current State Assessment

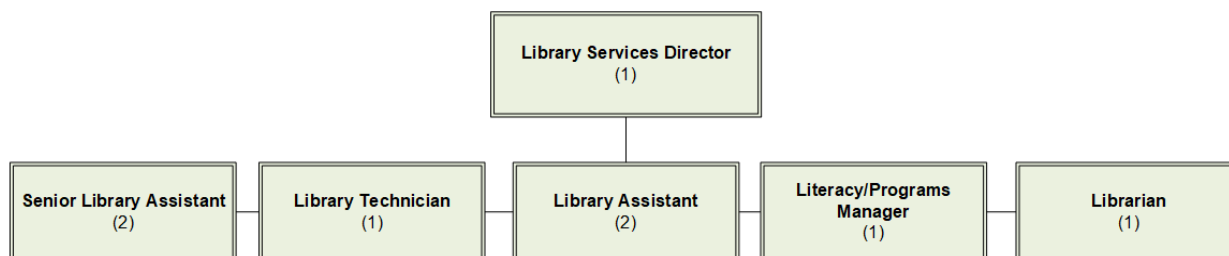
Observations of the Library assessment fell into three categories:

1. Staffing: Departmental structure alignment and position allocations
2. Programming: Number and type of program offerings in response to community need
3. Fiscal and operational concerns: Changing fiscal climate in the City.

Detailed current state observations are provided below. Observations were informed by one-on-one interviews with City of Lodi staff, members of the Lodi Library Board of Trustees, Friends of the Library, and the Library Foundation. In addition, data provided by the City of Lodi and neighboring jurisdictions helped in developing a quantitative analysis.

The City of Lodi's Library is staffed by 8 full-time equivalents (FTE) as shown in Figure 1 below.

Figure 1. Existing Organizational Structure: Department/Division Level



Department Structure and Position Allocation

One of the primary goals of this project was to gauge the Library's sustainability in both the near- and long-term. Over the last decade, the structure and allocation of positions in the department has changed significantly. There has also been more frequent attrition in the director position in recent years. With these changes and with staffing representing the single largest component of a budget, analyzing structure and staffing is key to understanding how well the Library is positioned to deliver services both now and in the future.

- **The reduction in professional Library staff has resulted in operational challenges and succession planning issues.** Over the past several years, the number of librarian positions in the department requiring a master's degree in library science (MLS) was significantly reduced from a total of five in FY 2012-13 to two in FY 2024-25. The results of these changes are an inability to manage the Library's collections properly, challenges with delivering appropriate programming, and the lack of a career progression ladder for librarian staff, leading to increased turnover.
- **The heavy reliance on part-time staff has resulted in service delivery and retention challenges.** Over time the Library has used a greater number of part-time, paraprofessional staff to fulfill public service desk and programming duties. These choices have created a situation where there are varying levels of employee skill in performing these functions, thus making it difficult to provide consistent quality. Actual expenditures for the previous two years show that only approximately 50% of the \$310,000 part-time budget was expended, indicating ongoing challenges in recruitment and retention.

- **Misaligned qualifications and vague education and experience requirements contribute to service challenges.** There are multiple job classifications where minimum qualifications and duties do not correspond to industry standards. For example, Librarian's Associates are required to have the equivalent of a bachelor's degree but are compensated less on an hourly basis than Library Assistants who do not have to meet a four-year degree requirement. Also, City job descriptions contain vague language that opens the door to hiring unqualified individuals. All job descriptions state, "any combination of experience and education that would likely produce the qualifying knowledge and ability," is acceptable. This did not correspond with language from the City of Stockton, the San Joaquin County or Stanislaus County job descriptions which had specific minimum qualifications. Where alternate experience patterns were considered, they were spelled out.
- **Professional behavior between staff members is inconsistent, resulting in lower morale.** In multiple interviews, subjects acknowledged that there is more conflict between staff than is healthy and that these situations have negatively impacted library service delivery to the public and created rifts between some staff.
- **Analysis of comparative salary data for library systems in the region shows that Lodi offers competitive wages and benefits.** Multiple interview subjects cited salary, particularly for the director, as impediments to retention. However, when comparing position compensation across several nearby jurisdictions, this did not appear to be the reason. Although some job descriptions do not align directly across jurisdictions, Tables 1 and 2 below show a comparison of similar full- and part-time positions in neighboring counties, with N/A marked for those positions that do not have direct alignment.

Table 1. Comparison of Monthly Salary Data for Full-Time Positions

Position Title	Lodi	SSJCPL	Stanislaus County	Sacramento County
Library Director/ Deputy Community Services Director	\$14,047.29	\$12,640.76	\$15,421.47	\$15,662.42
Librarian II	\$7,589.10	\$7,426.26	\$6,780.80	\$7,267.83
Literacy and Program Manager¹	\$7,281.07	N/A	N/A	N/A
Librarian I	\$6,899.18	\$6,260.76	\$6,110.00	
Library Technician	\$5,836.17	N/A	N/A	N/A
Senior Library Assistant	\$5,074.93	\$6,259.46	N/A	N/A
Library Assistant/ Library Assistant I	\$4,613.58	\$4,784.22	\$4,109.73	\$4,766.66
Library Assistant II²	N/A	\$5,541.10	\$4,544.80	N/A
Librarian III/ Library Manager	N/A	\$9,401.38	\$7,690.80	\$9,505.58
Circulation Assistant I³	N/A	\$4,691.67	N/A	N/A
Circulation Assistant II	N/A	\$5,170.03	N/A	N/A

¹ This position is most closely aligned with Librarian III/ Library Manager, but the duties and qualifications are different.

² Lodi does not use an intermediate Library Assistant II position between Library Assistant and Senior Library Assistant.

³ SSJCPL uses a separate Circulation Assistant classification for paraprofessional public service desk positions. Other libraries combine the same duties with programming support within the Library Assistant class.

Table 2. Comparison of Part-Time Hourly Rates

Position Title	Lodi	SSJCPL	Stanislaus County ¹	Sacramento County ²
PT-Librarian II (Hourly)³	\$41.70	N/A	NA	NA

Position Title	Lodi	SSJCPL	Stanislaus County ¹	Sacramento County ²
PT-Library Assistant/ Library Support Staff (Hourly)	\$25.35	\$21.00	NA	NA
PT-Librarian Associate/ Librarian Trainee (Hourly)	\$22.67	N/A	NA	NA
PT-Library Aide (Hourly)	\$18.52	\$16.00	NA	NA

¹ Stanislaus County does not hire these positions on an hourly basis.

² Sacramento County does not hire these positions on an hourly basis.

³ While other jurisdictions do not hire part-time hourly Librarian staff, Lodi's hourly rate compares closely with the FTE in other counties, which range between \$39.11 and \$42.84 per hour.

Numbers and Types of Library Programming

Expanding programming is a key trend in public library service and one of the most frequent topics that staff raised in our interviews. Interview subjects noted that while there were significant numbers of children's programs, there were few offerings for adults. In addition, those interviewed cited a lack of available programming space for current and future programming goals. The City recently made improvements to existing program spaces but the available square footage for programs is still insufficient for the Library's goals. The Library Foundation was highly successful in fundraising in the past year and is prepared to make investments toward larger-scale programming, but space remains at a premium. As part of this assessment, it is helpful to examine what the Library wants to do in comparison to current constraints.

- **Although the Library has invested significant resources in making physical improvements to the facility, there is still a lack of space for the desired level of programming.** The City and the Library Foundation have invested funds to create a teen space, renovate the community room and have plans to make improvements to the outdoor patio. Recent policy changes also make public meeting rooms more accessible for members of the community. Despite these improvements, the Library facility lacks space for desired offerings, such as a makerspace and auditorium for author series and lecture events. To put these needs in perspective, a makerspace serving 25 students would require an additional 1,500 square feet, and an auditorium with 250 seats would require approximately 3,000 square feet. The existing community room is 1,500 square feet.
- **The Library operates from a more traditional collection-based focus rather than a contemporary philosophy that prioritizes programming, fewer books, more space, and curated educational experiences.** Libraries are moving away from placing the physical collection at the center of library services. While print materials continue to have a prominent place, the digital age has shifted service priorities. Leading-edge institutions emphasize collaborative spaces, content creation, and activities.¹
- **Library programming has not adapted enough to support wider community needs.** While children's programming comprises the bedrock of library services, modern public libraries have also realized the benefit of offering an increasing number of programs for adults. Lodi has very few adult programs and is missing an opportunity to offer a broader portfolio that could advance City Council priorities (such as workforce development), support the growing diversity of residents, and bring in well-known authors and influencers to attract a wider audience.

Fiscal and Operational Concerns

Sustainability of programs and services is impossible without working within the limits proscribed by fiscal realities, providing clear governance, and having an awareness of issues that impact day-to-day

¹ Palmer, Marie. "Study of Future Public Library Trends & Best Practices." *Public Library Quarterly*, vol. 41, no. 1, Jan. 2022, pp. 83–107. EBSCOhost, <https://doi-org.ssjcpl.idm.oclc.org/10.1080/01616846.2020.1868224>.

operations. The following detailed observations focus on the most significant concerns in these areas relating to the Library.

- **Budget analysis indicates that the Lodi Library budget is higher than neighboring libraries.** Lodi's Library budget is approximately 30% (\$500,000) higher than neighboring libraries of comparable size, primarily related to staffing costs. Even when adjusting for the indirect administrative costs of a larger system, this is still a significant gap.
- **The Library will continue to face fiscal constraints over the long term.** The City is facing a growing structural deficit which will impact all departments, including the Library. While recent budget increases have helped, they have not been enough to overcome several years of stagnant funding. Materials budgets have been inconsistent based on what the City can afford, with lean years interspersed with one-time increases when possible.
- **There are governance challenges with the way current responsibilities are shared between the Board of Trustees and the City Manager.** The Library Board of Trustees (Board), appointed by the Mayor with the consent of the City Council, is a governing board primarily responsible for hiring the Library Director and approving Library policies and plans. The City Manager is responsible for all other administrative duties, including supervision of the director, personnel matters, and the Library budget. Although the responsibilities of the Board and City Manager were articulated by both parties, the lack of formal documentation distinguishing their roles is problematic. For example, the Board has, at times, due to their close working relationship with the director and staff, been drawn into Library personnel matters that are not under its purview. Having documentation of roles and responsibilities spells out the proper chain of command to all parties. Furthermore, the Board cites California Education Code sections 18910-18927 as its bylaws; however, neither the Education Code nor the City municipal code specifically outlines the roles of the Board or the City Manager regarding the Library. In addition, there are outdated aspects of the state education code that do not apply to the current Board, such as assigning them the hiring of all Library employees.
- **The Library has outdated technology that impacts service delivery.** Libraries rely on multiple technologies to improve services, such as integrated library systems (ILS) for checkout, materials-purchasing software, and print management software for the public. While the Library has recently improved its public Wi-Fi printing, there are longstanding issues such as non-functioning security gates and outdated self-check systems, causing a higher workload for staff at the service desk. The Library is also not using more rapid self-checkout methods such as Radio Frequency Identification (RFID).
- **As with many public institutions across the country, the Library struggles to adequately address the issue of homelessness.** This concern was repeated by several interview subjects. Past approaches provided some improvement, but the challenge remains due to changes in leadership, inconsistent policy enforcement, and the persistent nature of the issue in general.

There is a desire on the part of the Board, staff, and community to see the Library adapt to new realities and improve services. However, the Library is unable to adequately sustain itself, let alone improve services without making changes to the way it operates. The current combination of financial constraints, physical space limitations, and staffing challenges must be addressed.

There are several alternatives that the City should investigate to position the Library for optimal success. Alternatives that have the most potential include making changes to the structure and operations of the existing department, combining with a similar department such as Parks Recreation and Cultural Services, or joining the neighboring Stockton San Joaquin Public Library System. The future state assessment that follows will examine the benefits and drawbacks of each of these alternatives.

Future State Roadmap

To optimize the Library's continued success in the face of financial, physical space, and programming constraints, the City should investigate alternatives to the current service delivery model. There are three scenarios that warrant further investigation:

1. Making changes to existing department structure and services
2. Combining the department with the Parks, Recreation and Cultural Services Department (PRCS)
3. Joining the Stockton San Joaquin County Public Library System

We have provided an analysis below for each scenario, including benefits and drawbacks for each and recommendations for further pursuit of each alternative.

Making Changes to Existing Department Structure and Services

Several changes can be made to the current, standalone Library that will help address service goals and existing constraints. While these changes provide the least benefit in terms of financial savings, they will address staffing, space, and programming needs.

Recommendation 1. Conduct a review of all Library job descriptions to ensure qualifications match positions.

Library job descriptions contain vague language related to experience requirements. By matching minimum qualifications (education and experience) with assigned job duties and removing vague language in job descriptions, the City will avoid hiring under-qualified or unqualified employees.

Recommendation 2. Require Librarian's Associates to actively pursue a master's degree in library science.

Similar positions in other libraries are designed for people who have an interest in the profession of librarianship. Part-time librarian associates should be working toward an American Library Association-accredited Master of Library Sciences degree, with hourly compensation similar to positions in other libraries. This will result in recruiting more people directly interested in the profession and help with employee retention.

Recommendation 3. Add a new Librarian position to focus on adult programming.

The Library has a dearth of programming for adults and fewer librarians than in similar jurisdictions. By adding a librarian to the professional ranks, the Library will be able to expand into other desired program areas and have additional staff to assist with outreach, planning, and support of the Library Director. This position could be created by reallocating part-time staff costs, which for the past two years have only been expended at 50% of budgeted amounts.

Recommendation 4. Bring the Library outside into the community.

The Library lacks space in the current building for the programming that it desires to offer. Not all programs need to be at the Library. In many instances, going out into different parts of the community where people already gather helps further the Library's mission more effectively. For the types of programs that are desired (author series, lectures, etc.), the department should explore utilizing other spaces in the City, such as Hutchins Street Square and rooms available at recreation centers. There may even be underutilized spaces that are ideal for services such as makerspaces, satellite libraries, or podcast studios.

Recommendation 5. Assess collection space to see where more creation and activity space might be added.

Contemporary libraries have shifted to using space for more activities rather than larger collections. With more digital materials available, print collections in newer libraries are decreasing. Many libraries have done away with print reference collections, thus freeing up space for more community gathering and collaboration. Traditional library users can be uncomfortable with these changes, so community engagement is important when exploring this idea.

Recommendation 6. Invest in self-service.

The lack of functioning self-check systems places a higher burden on staff for physical checkouts. Modern libraries have embraced self-service for several reasons. Of course, savings on staff time are one of the main benefits, but increased self-service also prevents repetitive stress injuries for staff and allows for user privacy in the checkout/check-in process. One of the most common investments includes automated materials handling (AMH) systems, which automatically returns materials and sorts them for re-shelving. This is usually accompanied by Radio Frequency Identification (RFID) tagging, which allows simultaneous checkout of multiple items and speeds up the checkout process. RFID also allows for a more seamless and problem-free self-checkout process than legacy barcode systems. Returns on investment in these systems typically occur between 3 and 7 years.²

Recommendation 7. Create clear documentation for the Board of Trustees.

The Board needs bylaws and should not solely rely on the state education code for its guidance. Bylaws that outline their roles and responsibilities are necessary, along with clear documentation delineating the boundaries between their duties and those of the City Manager.

Combine the Library with the Parks, Recreation and Cultural Services Department

Many cities in California and across the United States have opted to combine library departments with other city services, usually those that provide similar leisure activities and have shared users. The most common combination is a library/recreation department. This alternative provides more economies of scale and financial sustainability over the long term than maintaining the Library as a separate department. There are also numerous opportunities for co-programming with recreational activities.

Recommendation 8. Engage staff and stakeholders in merger conversations early.

Department mergers are delicate transitions, and the greatest chance of success occurs when those affected are involved as soon as possible. There should be multiple meetings at the beginning to address employee concerns and solicit ideas as well as set a vision, mission, and goals for the merged department. Involvement of stakeholders such as the Library Board of Trustees, Parks and Recreation Board, Library Foundation and Friends are also necessary.

Recommendation 9. Convert Library Director to Deputy Director position under Parks, Recreation and Cultural Services (PRCS).

There is currently a Deputy Director for PRCS and converting the Library Director into a second Deputy Director of PRCS to oversee the Library would be the most logical first step once merger details are finalized.

Recommendation 10. Combine functions where there is duplication.

Library and recreation departments need to engage in efforts such as marketing, performance measurement, recruitment, budget monitoring, and administrative assistance. As part of merger planning, the City should examine where there might be duplication of effort and expected vacancies and use these as an opportunity to allocate resources more effectively.

² Ayre, Lori Bowen. "RFID Costs, Benefits, and ROI." *Library Technology Reports*, vol. 48, no. 5, July 2012, pp. 17–19. *EBSCOhost*, research.ebsco.com/linkprocessor/plink?id=455cc44a-f0bb-3840-8825-86fc9ec1ec91.

Recommendation 11. Utilize spaces in the new department for programs.

Similar to Recommendation #4, as part of a larger department, Library services may have opportunities to develop program and service locations in underutilized recreation facilities or have better access to other public spaces for large occasional programs such as author series, lectures, and summer reading performances. This could also generate additional revenue options.

Recommendation 12. Develop joint programs with PRCS.

Libraries serve the educational needs of the community and recreation serves their leisure needs. There are numerous creative opportunities to combine efforts to offer activities, particularly in the content creation space. Examples include programs teaching podcast techniques and offering studio space; makerspaces where participants are taught by staff how to execute their designs with 3D printing; and skills workshops to help small businesses establish online storefronts. Programs should be tied to existing City Council vision and goals.

Recommendation 13. Assess change with the Library Board of Trustees.

If the departments are merged, the City must work with the Board of Trustees to determine if any responsibilities will be augmented. Will the Board be responsible for selecting the deputy director? What input will they have in the hiring process? Will their role in approving policies continue? These questions must be addressed and documented in bylaws and other relevant policies.

Join the Stockton San Joaquin County Public Library (SSJCPL)

Lodi is the only independent municipal library in San Joaquin County. All other county municipalities and unincorporated areas are members of the Stockton San Joaquin County Public Library. The fact that this system is so comprehensive speaks to its success in providing an efficient and effective service delivery model. The system is funded by a library-specific dedicated property tax allocation collected in all county areas served by the system. The City of Stockton funds all Stockton libraries from the general fund and a Stockton-only local sales tax measure passed in 2016. Some cities (Manteca, Mountain House, Ripon and Tracy) provide additional city funding to increase library open accessibility hours beyond the baseline of 40 hours per week provided by the dedicated property tax funding.

There is much civic pride in the history of the Lodi Library and the prospect of joining a larger system must be considered from several vantage points. In addition to the recommendations in this section, the Baker Tilly team undertook an analysis of four important aspects of what such a change would look like: budget, staffing, programming, and hours of operation. This analysis is intended to give the City a more detailed picture of what to expect and to guide further discussions on this alternative. We have used the Tracy and Manteca branch libraries as the closest comparisons to Lodi, based on population and materials circulation. This alternative would provide the greatest cost savings due to greater economy of scale savings while realizing some programming benefits; but implementation would be the most challenging and require extensive community engagement to ensure success.

Budget

As mentioned in the Fiscal and Operational Concerns section of this report, the Lodi Library staffing budget averages about \$500,000 higher than those of Manteca and Tracy. Lodi has one additional full-time staff member, and the full-time staff budget is approximately \$250,000 higher than the two County branches. The part-time staff budget is \$310,540 for Lodi, which is \$250,000 higher than the other two branches; actual expenditures for the previous two years for part-time staff are about half of the approved budget services.

Non-Personnel budget items also show higher costs for Lodi than Manteca or Tracy. Lodi's budget is \$247,800 which is about \$50,000 higher than Manteca and Tracy when factoring in the online services costs for those two branches. Table 3 below shows the general fund budget comparison between the three branches.

Table 3. Comparison of FY 2024-25 General Fund Budgets

	Lodi	Manteca	Tracy
Population	66,000	84,000	93,000
Annual Library Circulation (FY 2022-23)	92,659	57,961	104,563
Total Revenue	\$36,200	\$58,721	\$62,180
Expenditures			
Payroll and Benefits	\$1,275,770	\$714,681	\$774,903
Insurance/ Internal Service Fund	\$287,180	\$257,511	\$363,821
Services	\$241,730	\$173,204	\$157,717
Telecom	\$8,800	\$10,042	\$10,000
Supplies	\$305,300	\$376,703	\$172,544
Travel Training	\$9,000	\$800	\$800
Total Expenditures	\$2,127,780	\$1,533,011	\$1,479,785
Net General Fund	\$2,091,580	\$1,474,290	\$1,417,605

Staffing

Staffing components at each library are similar, with Lodi having eight (8) full-time positions and the county branches having seven (7) each. If Lodi were to join the Stockton San Joaquin Library system, similar staffing levels would be assigned. Table 4 below shows the staffing level comparison.

Table 4. Comparison of Full-Time Staffing Levels

Position Title	Lodi	Manteca	Tracy
Circulation Assistant I	0	2	2
Circulation Assistant II	0	0	1
Library Services Director/City Librarian	1	0	0
Librarian I	1	0	1
Librarian II	0	1	1
Library Technician	1	0	0
Librarian Trainee	0	1	0
Library Aide II	0	1	0
Library Assistant I/II	2	2	2
Literacy/ Program Manager	1	0	0
Senior Library Assistant	2	0	0
Total	8	7	7

Programming

When compared to similar branch libraries in San Joaquin County, Lodi offers programs on par with local peers. Data from a three-month period show that the number of programs and attendance are within normal margins. SSJCPL did not include breakdowns between adult and children's programming.

However, a review of Library events over the period showed that most programs were oriented toward youth. While Lodi would likely gain more expertise and resources for programming by joining SSJCPL, the county system does not demonstrate the level of innovation that leading edge institutions provide. Figures 2 and 3 below show a comparison of the number of programs and program attendance.

Figure 2. Comparison of Library Programs April – June 2024

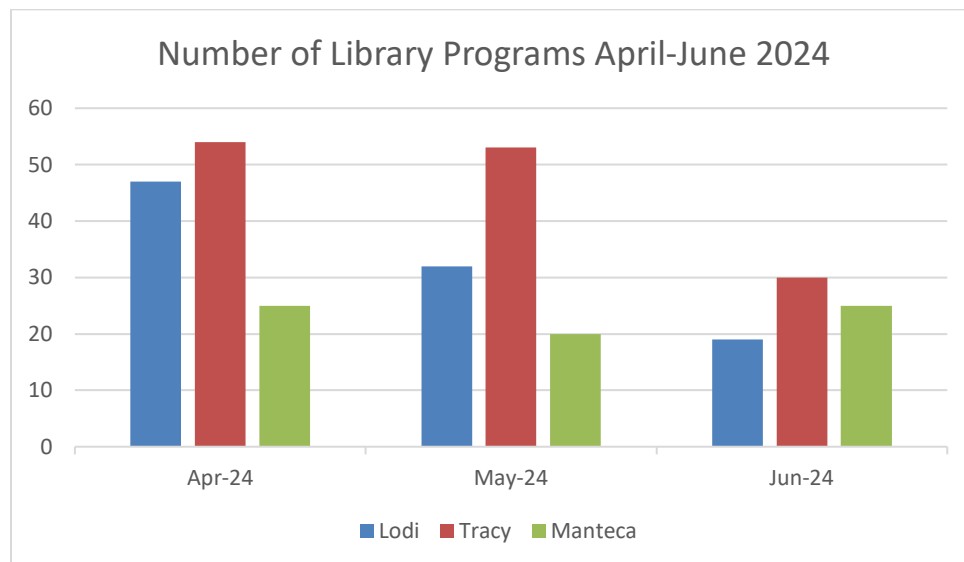
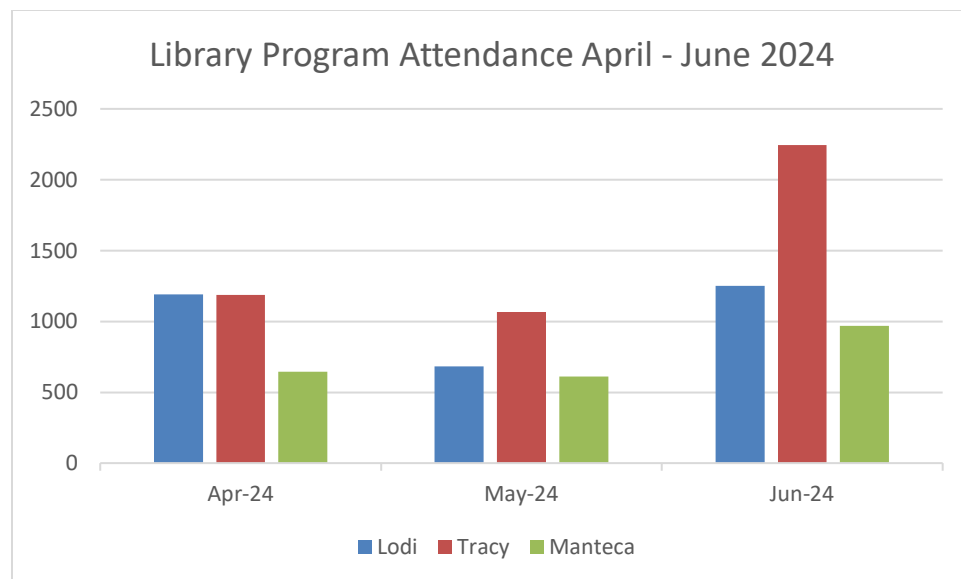


Figure 3. Library Program Attendance April – June 2024



Hours of Operation

The Lodi Library is open six days a week (closed Fridays) for a total of 43 hours. The Tracy Library is open seven days a week for a total of 53 hours, and the Manteca Library is open seven days a week for a total of 48 hours. All members of SSJCPL start with a baseline of 40 hours per week. Municipalities that wish to have additional open hours pay for those above and beyond the contractual baseline. No data

figures were available as to the unit cost for extra hours. If Lodi wanted to continue its current schedule, the City would be responsible for three additional hours of service.

Based on the analysis of budget, staffing, programming, and hours of operation, the City of Lodi can expect cost savings of approximately \$500,000 annually from joining SSJCPL while still maintaining a similar level of staffing and programming. Efficiencies would be gained through shifting director-level responsibilities to the SSJCPL central administration, lowering materials costs through bulk system purchases, and a wider range of resources available to residents. A larger shared catalog would give users access to all materials throughout the system, including a wider selection of digital services and eBooks and a simpler process for placing holds and having items delivered to the Library. The fiscal benefits of this alternative, however, should be weighed against the more intricate process required to join another system. The following recommendations provide a starting point for moving forward if this is a desired alternative for further study.

Recommendation 14. Gather additional information from SSJCPL.

The City needs to understand more detail about the specific costs of joining SSJCPL. For example, confirming the full- and part-time staffing components, establishing a process to transition current Lodi staff to SSJCPL staff, creating a pro forma budget, and determining setup costs related to technology.

Recommendation 15. Conduct extensive community engagement.

A decision of this magnitude will attract the attention of Library supporters, elected officials, donors, and other influential individuals. These stakeholders must have multiple opportunities to hear the plans and relay their input. Without strong community support, the efforts may flounder.

Recommendation 16. Determine the legal path for joining SSJCPL.

The City may join SSJCPL by either working through San Joaquin County to become a county branch or through a separate agreement with the City of Stockton. The City of Lodi will need to determine through negotiations which path is more appropriate and how funds will be transferred between Lodi and the partner agency. As noted above, the County system is mainly funded via a dedicated property tax collected in its service area and it may be problematic to replicate this revenue source in Lodi. More research will be needed to determine how to handle any tax-sharing arrangements. In addition, the City should establish a reporting process so that library decisions and financial status are communicated regularly to the Lodi City Council and Library support groups.

Recommendation 17. Develop a clear governance plan.

If Lodi joins SSJCPL, there are governance issues that must be addressed. The governing authorities for SSJCPL are the City of Stockton City Council for Stockton branches and the San Joaquin County Board of Supervisors for County branches. This means there would no longer be a role for the Lodi Library Board of Trustees as a governing body. The City should have a clear plan for how the board is dissolved and if members transition to another entity such as the Lodi Library Foundation. It is important to note that many branches in the SSJCPL have their own library support groups and that any donations directed to the Lodi Library would remain dedicated solely to Lodi Library needs.

Recommendation 18. Plan for the removal of the Director position.

As a member of SSJCPL, Lodi would no longer require a director. Those responsibilities would be spread between an SSJCPL Library Manager responsible for county branches and the Deputy Community Services Director-City Librarian for the City of Stockton. The City of Lodi should have a clear understanding of those duties and how they will be distributed within the new administrative structure.

Financial implications of each alternative

Each alternative comes with varying levels of financial and service implications. The following is an explanation of the estimated savings for each alternative, which is also summarized in Table 5 below:

Change Library structure and operations to better utilize existing resources.

- **Reallocate part-time budget to hire a new Librarian II.** The Library needs more professional librarian staff to support adult services and programs. The library has only spent 50% of its \$310,000 part time budget for the past two years. If a portion of those funds were reallocated to hire a new full-time Librarian II in charge of adult services and programming, the approximate annual savings would be \$30,000 - \$50,000.
- **Invest in self-service.** Converting to automated materials handling for returns and RFID tags for self-service checkout would also result in long-term savings. Initial investment costs are approximately \$150,000 - \$200,000 for a library of Lodi's size with a return on investment between three and seven years. Ongoing annual savings on part-time costs would be approximately \$50,000.

Combine with the Parks, Recreation and Cultural Services Department (PRCS) to achieve some administrative streamlining.

- **Convert Library Director to Deputy PRCS director.** In addition to the changes listed above, combining with PRCS would provide additional savings due to changes in organizational structure as well as creating opportunities for more co-programming between library and recreation. This would be achieved by converting the Library Director position to a Deputy Director position in PRCS. Approximate annual savings would be \$30,000 - \$50,000.

Join the Stockton San Joaquin County Public Library to achieve administrative streamlining and economies of scale savings.

- **Lower staff costs.** Because there is a distributed administrative structure in SSJCPL, there would no longer be a need for a Library Director as those responsibilities are shared between a Library Supervisor responsible for multiple branches and a City/County Librarian who leads the entire organization. Lodi would retain a similar staff size and have at least two full-time librarian positions on site. Factoring in the portion of unused part-time budget, annual savings would be approximately \$500,000.
- **Lower materials and services costs.** Due to the size of SSJCPL, higher publisher discounts are available as well as discounts from digital service providers such as eBook suppliers. Most materials are purchased centrally through SSJCPL, but local branches have autonomy on augmenting collections for their residents. This would result in annual savings between \$50,000 - \$80,000 on materials.

Table 5. Summary of Estimated Savings for Each Alternative

Alternative	Service Changes	Estimated Savings
Change existing structure	Reallocate unused part-time funds for new Librarian II position (\$30,000-\$50,000 annual savings)	Estimated ongoing annual savings between \$30,000 - \$100,000
	Invest in self-service (\$50,000 annual savings after initial investment of \$100,000-\$200,000)	

Alternative	Service Changes	Estimated Savings
Combine with Parks, Recreation and Cultural Services (PRCS)	Convert Library Director position to Deputy Director of PRCS (\$30,000-\$50,000 annual savings)	Estimated ongoing annual savings between \$30,000-\$50,000 and up to \$150,000 if it includes new Librarian II position and investment in self-service.
Join the Stockton San Joaquin County Public Library (SSCPL)	Salary savings while maintaining current staff size and hours including 2 FTE librarians. (\$500,000 savings due Economies of scale) Savings from bulk purchasing and online services discounts (\$50,000-\$80,000)	Estimated ongoing annual savings between \$500,000-\$580,000

Conclusion

The Lodi Public Library has provided continuous service to residents for almost 140 years. A history of this length could not have been achieved without a strong commitment to service and an ability to adapt to changing circumstances. With larger societal shifts occurring and local needs evolving, the Library has continued to adapt by improving its physical presence, investing in collections and attracting community members with a variety of programs and services. Yet more is needed if the Library is to remain sustainable and thrive into the future. There are multiple pathways to success, and it has been our goal to provide the City of Lodi with a range of choices and a comprehensive set of recommendations that will help promote excellence in Library service delivery both now and in the future. We appreciate the opportunity to assist you in this process and remain available for any further help you may need.

Attachment A – List of Recommendations

Recommendation 1.	Conduct a review of all Library job descriptions to ensure qualifications match positions.	10
Recommendation 2.	Require Librarian’s Associates to actively pursue a master’s degree in library science.	10
Recommendation 3.	Add a new Librarian position to focus on adult programming.	10
Recommendation 4.	Bring the Library outside into the community.	10
Recommendation 5.	Assess collection space to see where more creation and activity space might be added.	10
Recommendation 6.	Invest in self-service.	11
Recommendation 7.	Create clear documentation for the Board of Trustees.	11
Recommendation 8.	Engage staff and stakeholders in merger conversations early.	11
Recommendation 9.	Convert Library Director to Deputy Director position under Parks, Recreation and Cultural Services (PRCS).	11
Recommendation 10.	Combine functions where there is duplication.	11
Recommendation 11.	Utilize spaces in the new department for programs.	12
Recommendation 12.	Develop joint programs with PRCS.	12
Recommendation 13.	Assess change with the Library Board of Trustees.	12
Recommendation 14.	Gather additional information from SSJCPL.	15
Recommendation 15.	Conduct extensive community engagement.	15
Recommendation 16.	Determine the legal path for joining SSJCPL.	15
Recommendation 17.	Develop a clear governance plan.	15
Recommendation 18.	Plan for the removal of the Director position.	15