

**Economic Impact of the Hawaii State Public Library System (HSPLS)
on the Business and Tourism Industries Study:**

Final Report

By

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Abstract

Ryan Information Management conducted a return on investment (ROI) study of the economic value of the Hawaii State Public Library System (HSPLS) and identified potential additional sources of operating revenue. HSPLS economic value was examined from four viewpoints, HSPLS:’ direct economic impact, market value, peer comparison and value to library users. Principal findings were HSPLS pumped \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, returning over \$13 to the Hawaii taxpayer in library services for every tax dollar invested, saving every person \$218 and saving the average Hawaii family \$747 a year. The study also found that HSPLS is seriously under funded when compared to peer library systems, peer states or national norms. HSPLS would need an *annual* sustained increase in revenue of \$7-\$12 million to have support comparable to peers and to national norms.

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EXECUTIVE SUMMARY

Ryan Information Management was commissioned to study the economic value of the Hawaii State Public Library System (HSPLS) and potential additional sources of operating revenue with the following objectives:

- **Phase I: HSPLS economic value:** Described HSPLS' direct impact on the economy of Hawaii; estimated the market value of the most heavily used HSPLS services; compared HSPLS to peer public library systems, the "best" public libraries, peer states and national norms; and, reviewed qualitative data collected from library users on the value of HSPLS.
- **Phase II: HSPLS additional revenue sources:** Identified and assessed potential additional sources of sustainable (recurring) revenue to that provided by state government.

The study was conducted in two phases and began August 2002 and was completed in June 2003.

Phase I Report

Phase I of this report addressed Hawaii Public Library System's (HSPLS) economic value focusing on four primary areas:

- **HSPLS' Direct Economic Impact:** The research question was: What is HSPLS' direct contribution to the economy of Hawaii?
- **HSPLS Market Value:** Research questions were: What would Hawaii resident pay in the commercial marketplace if they had to purchase the services HSPLS offers for free? What is the taxpayer's return on state tax dollar investment in HSPLS? How much does HSPLS save the Hawaii resident and family on average annually?
- **Peer Comparison:** Research questions were: How does HSPLS compare to peer systems serving populations within $\pm 15\%$ of the legal population served in Hawaii? How does HSPLS compare to the "best" library systems serving populations over 500,000? How does HSPLS compare with states serving populations of similar size? How does HSPLS compare to national norms?
- **HSPLS Value to Library Users:** How do library users self-describe the value HSPLS services? Not everyone expresses or understands the value of HSPLS using numbers. An alternative approach is to gather good stories and examples of HSPLS' value.

Principal findings from phase I were that HSPLS pumps \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, returning

over \$13 to the Hawaii taxpayer in library services for every tax dollar invested, saving every person \$218 and saving the average Hawaii family \$747 a year. The study also found that HSPLS is seriously under funded when compared to peer library systems, peer states or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to have support comparable to peers and to national norms.

HSPLS' Direct Economic Impact

HSPLS' directly contributed over \$20 million a year to the economy of Hawaii in wages and salaries, building maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, fee based services and repair and maintenance.

HSPLS Library Services Market Value

The study team asked what it would cost Hawaii taxpayers if they had to pay commercial market rates for selected, heavily used, library services that taxpayers presently obtain for an annual cost of less than the price of a hardback best seller. The results are summarized in Table I-3 (reproduced below). The study found that in fiscal 2000, if Hawaii residents had to pay commercial rates for the six most heavily used library services it would have cost them over \$282 million. If those services were considered traditional sales, HSPLS would easily make *Hawaii Business's* annual "Top 250 companies in Hawaii" list. The return on taxpayer investment in fiscal 2000 was over \$13 for every tax dollar invested in the library system. The average taxpayer paid \$17.74, about the price of a hardback bestseller, in tax support to HSPLS and saved on average \$218 per year. The average family paid \$60.66 in tax support to HSPLS and saved on average \$747 a year when they used the library in 2000.

Table EX-1 Market Value Study: Total Value for Selected 2000 HSPLS Services			
Library Activity	Market Rate	2000 Use	2000 Market Value
Admissions (Walk in Patrons)	\$3.75	6,164,912	\$23,118,420.00
Materials Use	\$27.92 ¹	6,759,957	\$188,722,451.54
In Library Material Use	\$13.96 ¹	4,333,368	\$60,488,833.91
Hours of Reference Service	\$50.00/hr	133,510	\$6,675,500.00
Hours of Internet Workstation Use	\$12.00	120,016	\$1,440,192.00
Library Programs Attendance	\$5.00	262,188	\$1,310,940.00
Annual Total Market Value:			\$281,756,337.45
Annual State & Federal Tax Income:			\$21,158,335
Total Annual HSPLS Income:			\$22,754,047
Hawaii Population Served:			1,193,001
Return on Investment per \$1 Taxed:			\$13.32
Annual Savings for Individual:			\$218.44
Annual Savings for Average Family:			\$747.06

¹ This is an average rate see Appendix I-5 for discussion.

The market value study clearly showed that HSPLS is a state government agency that works, showing a high return on investment for its citizens and its families year after year.

Peer & National Norm Comparisons

The peer comparison portion of the study asked how HSPLS compares to: peer public library systems, the top rated public library systems nationally, states serving a similar population and, national norms. The study found that:

- HSPLS delivery of library services is on par with peer library systems;
- HSPLS is substantially under funded whether compared to peer library systems, the “best” public libraries, peer states or to national norms. It would take \$7 to \$12 million annually to match peer or national norm funding;
- HSPLS infrastructure, including staff, collections and information technology, is already seeing erosion.

See summary detail of funding needed in Table EX-2. Without additional funds, ongoing infrastructure erosion will force service curtailment and failures despite HSPLS’ valiant efforts to meet Hawaii citizens’ needs.

Area of Comparison	Hawaii	Peer Lib. Systems	Peer States	National Norm	“Best” Libraries
Total Income per Capita:	\$19.10	\$24.72	\$25.67	\$28.96	\$52.44
Annual Amount Needed to Catch Up		\$6,701,433	\$7,830,404	\$11,760,149	\$39,775,854
Collection Expenses per Capita:	\$1.77	\$3.25	\$3.64	\$4.02	\$8.62
Annual Amount Needed to Catch Up		\$1,765,617	\$2,228,719	\$2,682,059	\$8,169,864
Staff Expenses per Capita:	\$13.84	\$14.02	\$16.05	\$16.96	\$28.95
Annual Amount Needed to Catch Up		\$220,328	\$2,637,314	\$3,727,717	\$18,036,975
Public Internet Terminals per 5,000 Population:	0.8	1.11	2.50	1.9	2.23
Annual Amount to Catch Up:		\$220,328	\$2,637,314	\$3,727,717	\$18,036,975

Talk Story

Library users were invited to talk story about the value of the library to them in a contest sponsored by the Library Friends that ran from approximately November 18, 2002 to January 10, 2003. The responses illustrated the significant benefits and impacts that HSPLS has on Hawaii residents. The results suggest that for many library users, Hawaii public libraries and library staff are viewed as part of the community Ohana that library users count on and that makes life worth living.

Phase II Report

Phase II of the study considered ways that HSPLS might address the annual revenue shortfall when compared to peer and national norms identified in the Phase I. A few suggestions were made regarding efforts to increase funding from the present principal source – State Department of Education funds. However, the assumption was that revenue from this source will be flat or declining. The State Librarian notes, "...with additional cuts being planned or discussed, and with an even higher percentage of our general fund going to salaries, we know we can no longer conduct business as usual and that we must embark on a different path to accomplish our mission."² Thus, the focus was on additional sources of revenue. The principal research question was:

What additional sources of sustained revenue commonly used by other public libraries in the U.S. should HSPLS consider to reduce the \$7-\$12 million annual shortfall in revenue HSPLS faces compared to peer library systems, peer states and national norms?

The study considered five principal additional sources of revenue:

- **Library support organizations:** What is the current role and future potential of the library Hawaii Library Foundation and Friends of the Library of Hawaii? What suggestions can the study team offer to the Foundation and Friends management based on experience with other library support organizations throughout the U.S.?
- **Federal state or local government tax assessment alternatives:** What are additional federal, state or local government tax assessment mechanisms used by other libraries in the U.S. that HSPLS might consider?
- **Intergovernmental revenue or in kind transfer:** What in kind support do other public libraries receive from their county and local governments?
- **Corporate support:** What has been peer library experience been with raising sustained support from corporate sources?
- **HSPLS enhanced services or retail operations:** Are there enhanced services or retail activities used by other public libraries in the U.S. that HSPLS should consider?

In each case, the study team investigated peer library experience with generating sustained additional sources of revenue and conducted exploratory meetings with Hawaii-based counterparts. The report concludes with the study team's recommendations and suggested next steps. The intent of this section of the report was to provide HSPLS planners with a clearer picture of the additional sources of revenue options available.

² (2003, January 21). Funds for Kapolei library sought. *Honolulu Star Bulletin*. <<http://starbulletin.com/2003/01/21/news/story4.html>>

The study team wishes to note with thanks that we were ably assisted by project liaison, Craig Nosee and a Hawaii based project advisory team of library professionals.

The study principals were Joe Ryan and Charles R. McClure. Joe Ryan is President of Ryan Information Management (RIM). Recent work includes assisting the State Library of Florida in preparation of a strategic plan, aiding the Institute of Museum and Library Services' (IMLS) assessment of the use of national funds by public libraries to reduce the digital divide, and helping library managers to develop measures of library Internet services. Charles R. McClure is President of Information Management Consultant Services, Inc. (IMCS) and the Francis Eppes Professor of Information Studies and Director of the Information Institute at Florida State University. McClure has recently completed or is currently involved in public library strategic planning efforts, information technology planning, statewide library planning and other studies for San Antonio Public Library, the Commonwealth Libraries of Pennsylvania, State Library of Florida, Nashville Public Library and others.

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INTRODUCTION

The Hawaii Public Library System (HSPLS) asked Ryan Information Management to address the *Economic impact of HSPLS on the business and tourism industries of Hawaii*. The project had two components addressed in two phases that are presented here in separate sections of the report.

Phase I Assessing HSPLS' Economic Value

Phase I addressed HSPLS' economic value focusing on four primary areas:

- **HSPLS' Direct Economic Impact:** The research question was: What is HSPLS' direct contribution to the economy of Hawaii?
- **HSPLS Market Value:** Research questions were: What would Hawaii resident pay in the commercial marketplace if they had to purchase the services HSPLS offers for free? What is the taxpayer's return on state tax dollar investment in HSPLS? How much does HSPLS save the Hawaii resident and family on average annually?
- **Peer Comparison:** Research questions were: How does HSPLS compare to peer systems serving populations within $\pm 15\%$ of the legal population served in Hawaii? How does HSPLS compare to the "best" library systems serving populations over 500,000? How does HSPLS compare with states serving populations of similar size? How does HSPLS compare to national norms?
- **Talk Story:** How do library users self-describe the value HSPLS services? Not everyone expresses or understands the value of HSPLS using numbers. An alternative approach is to gather good stories and examples of HSPLS' value.

Principal findings from phase I were that HSPLS pumps \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, returning over \$13 to the Hawaii taxpayer in library services for every tax dollar invested, saving every person \$218 and saving the average Hawaii family \$747 a year. The study also found that HSPLS is seriously under funded when compared to peer library systems, peer states or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to achieve support on par with peer and national norms.

Phase II: Investigating Additional Sources of HSPLS Revenue

Phase II investigated ways that HSPLS might address the annual revenue shortfall when compared to peer and national norms identified in phase I of the study. The principal research question was: what additional sources of sustained revenue commonly used by other public libraries in the U.S. should HSPLS consider to reduce the \$7-\$12 million annual shortfall in revenue HSPLS faces compared to peer library systems, peer

states and national norms? The study considered five principal additional sources of revenue:

- **Library support organizations:** What is the current role and future potential of the library Hawaii Library Foundation (HLF) and Friends of the Library of Hawaii? What suggestions can the study team offer to the Foundation and Friends management based on experience with other library support organizations throughout the U.S.?
- **Federal state or local government tax assessment alternatives:** What are additional federal, state and local government tax assessment mechanisms used by other libraries in the U.S. that HSPLS might consider?
- **Intergovernmental revenue or in kind transfer:** What in kind support do other public libraries receive from their county and local governments?
- **Corporate support:** What has been peer library experience been with raising sustained support from corporate sources?
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In each case, the study team investigated peer library experience with generating sustained additional sources of revenue and conducted exploratory meetings with Hawaii-based counterparts. The report concludes with the study team's recommendations and suggested next steps. The intent of this section of the report was to provide HSPLS planners with a clearer picture of the additional sources of revenue options available. The study team wishes to note with thanks that we were ably assisted by project liaison, Craig Nosee and a Hawaii based project advisory team of library professionals.

PHASE I REPORT: VALUE AND IMPACT OF HAWAII PUBLIC LIBRARIES

INTRODUCTION

This phase I report addresses Hawaii Public Library System's (HSPLS) economic value focusing on four primary areas:

- **HSPLS' Direct Economic Impact:** The research question was: What is HSPLS' direct contribution to the economy of Hawaii?
- **HSPLS Market Value:** Research questions were: What would Hawaii resident pay in the commercial marketplace if they had to purchase the services HSPLS offers for free? What is the return on investment for each tax dollar invested in HSPLS? What is the average taxpayer's and family's return on investment in HSPLS?
- **Talk Story:** How do library users self-describe the value HSPLS services? Not everyone expresses or understands the value of HSPLS using numbers. An alternative approach is to gather good stories and examples of HSPLS' value.
- **Peer Comparison:** Research questions were: How does HSPLS compare to peer systems serving populations within $\pm 15\%$ of the legal population served in Hawaii? How does HSPLS compare to the "best" library systems serving populations over 500,000? How does HSPLS compare with states serving populations of similar size? How does HSPLS compare to national norms?

Principal findings from phase I were that HSPLS pumps \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, returning over \$13 to the Hawaii taxpayer in library services for every tax dollar invested, saving every person \$218 and saving the average Hawaii family \$747 a year. The study also found that HSPLS is seriously under funded when compared to peer library systems, peer states or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to achieve support comparable to peer and national norms.

SUMMARY OF PHASE I METHOD

HSPLS Economic Impact Method

The study team began Phase I by identifying HSPLS' direct impact on the economy of Hawaii via the portion of its income spent on such items as in wages and salaries, building maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, fee based services and repair and maintenance.

The researchers consciously decided not to pursue or include other likely but less direct or secondary economic and non economic benefits that HSPLS contributes to Hawaii economic and social capital. For example, ripple effects from salary and other local expenditures;³ economic impacts from visitors due to increased, new to the economy spending;⁴ stimulation of other spin-off development;⁵ increased community visibility;⁶ and, enhanced community image.⁷ The intent was to simply focus and remind community stakeholders on the notion that HSPLS is a large Hawaii business. The method chosen was adequate to the task and within the limited resources available to the task.

HSPLS Market Value Method

The first task was to establish criteria for including a library service in the market valuation. Modern public libraries offer a diverse range of services. Not every service that HSPLS offers could be represented in the market value study. Indeed, the most important service to an individual taxpayer may not be represented here. Said differently, inclusion of a HSPLS service in this study is not an indication of the service's importance. Instead, services were included because they met the following criteria:⁸

- **Use data could be easily obtained.** The study's analysis was based on the use of a service, thus requiring use data. HSPLS staff could not be asked to gather new data in a short period of time in addition to their regular duties. So services were selected only if use data were readily available. Creditable data were unexpectedly difficult to obtain. Sources purporting to report the same data disagreed, data were scattered or disaggregated or simply unavailable. Fortunately, as it turned out, there was ample data available.
- **Commercial analog available:** The study requires that its readers readily accept the commercial analog to library service chosen. The service could not be used in the study if there was no equivalent to the library service readily apparent.
- **Service was heavily used:** Reporting smaller services might give undue weight in the public's mind to a reported service over one that was not (due to

³ Although this may become all too apparent if budget cutting is sustained.

⁴ Although a number of local experts suggested HSPLS was responsible for such benefits particularly as a result of part time resident choice of where to temporarily live.

⁵ Although again this effect was noted by a number of those interviewed, particularly as it related to HSPLS libraries located in or near shopping centers.

⁶ Both increased community visibility and enhanced community image regularly came up as important benefits derived from locating HSPLS public libraries in certain communities during discussions with library users, library managers and local civic leaders on every island.

⁷ See Compton for a related discussion on the role of sports teams and stadia and economic development. Compton, J. (2001) Public subsidies to professional sports teams in the USA. In Gratton, C. and Henry, I. (Eds.). *Sport in the city. The role of sport in economic and social regeneration*. NY: Routledge. pp. 16.

⁸ Specifically not a criterion in the selection of a service for inclusion in the market value study was whether HSPLS actually could or should alter existing HSPLS policy and charge a fee for the service so as to provide a new, sustainable source of revenue.

the above reasons). It was easy to show that HSPLS offered a good return on taxpayer investment. Indeed the challenge was to conservatively report market value with a figure low enough so that it would be believed. Not reporting lesser used services helped increase credibility.⁹

The consultants were assisted ably by the project's advisory committee, see Appendix I-1. This group aided in finding commercial analogs to library services and then determining local pricing among other key project tasks. A partial list of the services considered, but not always included, with discussion, is presented in Appendix I-2.

Next, the chosen services were grouped for brevity and clarity into six heavily used service categories:

- **Admissions:** Is the number of walk in visitors to HSPLS libraries,
- **Materials use:** Includes circulation of adult, young adult and juvenile books and videos, CDs, DVDs and other media rental,
- **Materials use within the library:** Includes use of adult, young adult and juvenile books, reference books, newspapers and magazines, videos, CDs, DVDs and other media based on two week long samples at different points in the year,
- **Reference service:** Calculated by computing the number of hours of reference service and multiplying that figure by the hourly rate of a commercial information broker in Hawaii,
- **Internet workstation use:** Is based on log sheet counts, and
- **Library programs:** Includes adult, young adult and children's programs.

Data were collected on each of the library services chosen. This report relies on 2000 (or fiscal year 2000-2001) data. Much of the basic data for this portion of the study comes from the branch manager reports compiled in the *Annual summary for fiscal year 2000-2001*.¹⁰ Appendix I-3 summarizes these branch activities.¹¹ 2000 data were selected because comparative data from other library systems across the country were readily available in a standardized form by the National Center for Educational Statistics

⁹ A good example of a highly valued service not included is the HSPLS Library for the Blind and Physically Handicapped (LBPH) transcription service, transcribing publications into Braille. In 2001, 2,576 pages were transcribed at a commercial rate of \$3,675. This service is invaluable to the visually challenged, indeed it can not easily be obtained elsewhere by Hawaii residents. But its commercial equivalent value is small when compared to other HSPLS service categories. So it was not included in this study

¹⁰ Data with the exception of library hours of operation come from HSPLS. (2001, December). *Annual summary for fiscal year 2000-2001*. Honolulu: HSPLS. Individual branch reports were tallied (as the summary table and branch totals did not agree). Library hours were tallied from a schedule of HSPLS hours.

¹¹ Note: The data reported by the branches in the *Annual Summary* is consistently lower than that reported in NCES (2002). This is probably due in part to slightly different reporting periods. But not every data element needed was reported in NCES (2002), e.g. total amount of programs. So the decision was to use the data from the same source and same document that had all the data needed. The decision was supported in that the data was consistently lower and thus a more conservative approach.

(NCES).¹² Data from this same source could be used for the peer comparisons later in the study.

Commercial analogs and their values were chosen. For example, the number of people visiting the library was chosen as one of the services. The researchers identified the number of visitors in fiscal 2000. The study team with advisory team support chose the market analog to be the museum admission rate. The average rate was then found by identifying a national study that provided an average U.S. museum admission rate and cross-checking the rate by sampling a group of Hawaii museum rates to be sure the rate was reasonable. Next the market value for each library service category was calculated by multiplying the use figure by the market rate. So, for example, the number of library visits was multiplied by the chosen market rate, the average museum admission price. Then each library service total was added to arrive at a grand total.

The researchers then used the data the study team compiled on the market value of HSPLS' top six most heavily used services to place it within the largest businesses of Hawaii. For the sake of illustration, the computed market value of these popular services was assumed to be similar to a for profit company's annual sales. The HSPLS market value for popular services figure was then compared with the sales revenue of Hawaii's largest companies using the *Hawaii Business's* annual "Top 250 companies in Hawaii" list. A Hawaii business had to have sales of \$23 million or more to be considered for the Top 250 for the August 2001 issue.¹³

The return on investment figure was calculated by dividing the total market value of the six most heavily used HSPLS services by the total amount of state and federal tax dollars received in revenue by HSPLS. A market value per capita figure was calculated by dividing the total market value by the population. Acting on the suggestion of several business leaders, the consultant calculated how much HSPLS saved the average family in Hawaii annually.¹⁴ This was calculated by multiplying the market value per capita by the average family size.¹⁵ See Appendix I-4 for a brief discussion of the rates used and issues associated with calculating the market values for each library service category, return on investment and family value.

Caveat on Interpreting the Market Value Results

The data presented only provide an estimate and a glimpse of the true value of HSPLS services to its users and the resident of Hawaii. The study relies on use of library services data. It does not measure how much library users benefit from a service or its impact on their lives. For example, a user might check out a book on resume writing. The resulting better resume might lead to a better job providing the user years of higher income, an

¹² See NCES. (2002, July). *Public library locator: Fiscal 2000*. Washington, DC: NCES.

¹³ Hawaii Business. (2001, August). Hawaii Business Top 250. *Hawaii Business*. See the Top 250 Guide. <<http://www.Hawaiiibusiness.cc/hb82000/default.cfm?articleid=19>> or Compiling The Top 250. <<http://www.Hawaiiibusiness.cc/hb82001/default.cfm?articleid=23>>.

¹⁴ See Appendix I-4 I Calculating HSPLS Library Services Market Value Issues under the Calculating Average Hawaii family savings sub-section for how this was done.

¹⁵ The 2000 U.S. Census reports the average Hawaii family size as 3.42 people.

employer with a better employee, and thus the community is better served. In other cases, the book, upon reading, may not be what the user wanted and therefore was worthless. This study inadequately values that use at \$36.20 the average price of an adult hardback book. The talk story portion of the study tries to capture a more informed glimpse of the actual benefits and impact of library services to its users.

HSPLS Value to Its Library Users Method

The earlier components of this study rely on use data and comparisons among peer libraries and national norms to describe HSPLS' value. Another view is provided by collecting qualitative data, in this case stories in library users own words, about the value of the libraries. Not all people communicate or understand their sense of value using numbers. Qualitative data remains the best choice for beginning to describe HSPLS' benefits or impacts. The "Talk Story" survey put a "human face" on the numbers and showed the benefits HSPLS services provide.¹⁶ This approach in Hawaii draws on a long-standing Hawaiian tradition of talking story about the things that matter and the things that community elders (and the not so old) would like to pass on.

HSPLS users at each of its branches were invited while in the library to "talk story" about the library.¹⁷ The Friends of the HSPLS Library offered to underwrite a contest with prizes and the data collection effort became a contest. Token awards were given to the best story on each of the islands (with Lanai, Molokai and Maui being treated as one island) and to the libraries that submitted the winning stories. Branch staff received written instructions on administering this effort and the study team prepared a written form for patron use. See Appendix I-5 for instrument and instructions. Public service staff were asked to actively promote the completion of these forms by library users. Should a library user prefer to talk rather than write his/her story a staff member was designated to "receive" the story and prepared an electronic summary using the users own words as much as possible. The contest ran from approximately November 18, 2002 to January 10, 2003. Response was hampered due to the holidays and time was short due to the need to have these stories in time for the beginning of the legislative session January 15, 2003.

The project liaison and HSPLS Administrative Assistant, Craig Nosee, was the judge of the contest winners.¹⁸ The study developed the following criteria for judging the

¹⁶ Routine collection of qualitative data in support of public service use is routine at some organizations. Rather than have a complaint box at the library, this is a praise box. The American Park Network, a large publisher of park guides, routinely solicits "great stories" about park use and even has a web based submission mechanism <<http://www.americanparknetwork.com/home/>>.

¹⁷ This approach to gaining qualitative feedback on public libraries is fairly common. For example, Ohio Public Libraries <<http://www.oplin.lib.oh.us/>> recently conducted a "Why I Love My Library" survey receiving over 250 responses, the authors of their favorite ten will receive an OPLIN travel mug.

¹⁸ The consultants learned during an April 2003 site visit that the contest had not been judged yet and the administrative assistant would not judge it. So Ryan offered his take on the winners and donated \$350 to the Friends, see Appendix I-5a in the hope that the contest would receive its long overdue resolution. As of June 15, 2003, the consultant's check had not been cashed.

submissions: (1) Depth: getting “good” stories about the library and its services and (2) Breadth: Getting stories about as many different library services as possible.

HSPLS Comparison to Peer Libraries, Peer States & National Norms Method

The study team was asked to investigate how HSPLS compares to:

Peer Libraries: How does HSPLS compare to peer library systems (Phoenix, Orange County (CA), Sacramento, San Diego, Palm Brach, Detroit, Las Vegas, Dallas, Harris County, San Antonio, King County) serving populations within 15% of the legal population served (roughly between 1,014,051 – 1,371,951) in Hawaii?

“Best” Libraries: How does HSPLS compare to Hennen’s¹⁹ top rated library systems (Denver, Columbus, Multnomah County, Baltimore County, Indianapolis-Marion County, Hennepin County, Salt Lake County, Cuyahoga County, Montgomery County, Fairfax County) serving populations over 500,000?

Peer States: How does HSPLS compare with states serving populations of similar size (Idaho, Maine, Nebraska, New Hampshire and Rhode Island) using the latest NCES state data?²⁰

National Norms: How does HSPLS compare to national norms?²¹ National norms are national averages in the areas considered for all public libraries in the U.S.

in the following strategic areas:

Finance: Is HSPLS appropriately funded when compared to peers and national norms?

Delivery of services: Is HSPLS delivering services such as public service hours, number of visitors, materials use, reference service and library programs, on a par with peers and national norms?

Infrastructure: Is HSPLS investing in its underlying infrastructure, such as number of branches, collection development, staff and information technology on par with peers and national norms?

Peer comparisons have high face validity. No one likes to be second best. Analysis of peer comparison data can provide benchmark comparisons that deepen understanding of a library system’s finances, operations and services and enable more effective managerial decision making. This portion of the study was able to build on an earlier effort by HSPLS’ Craig Nosee and others which was completed during 2001 and presented to lawmakers, the Board of Education, and the public in support of HSPLS funding requests.

¹⁹ Hennen, Thomas J. Jr. (2002, October). Great American public libraries: The 2002 HAPLR rankings. *American Libraries*. 64-68. (See table p. 66). Hennen’s study uses data compiled by: Chute, A., Kroe, E., Garner, P., Polcari, M., and Ramsey, C.J. (2002). *Public Libraries in the United States: Fiscal Year 2000* (NCES 2002–344). Washington, DC: U.S. Department of Education, National Center for Education Statistics. This is the same data source the study team used for the other peer comparisons. There are a number of caveats to this approach beyond the extended discussion of whether these are the best public library systems. For the sake of this discussion, few would dispute that these are very good library systems.

²⁰ Chute, A., Kroe, E., Garner, P., Polcari, M., and Ramsey, C.J. (2002). *Public Libraries in the United States: Fiscal Year 2000* (NCES 2002–344). Appendix C, Table 7. Washington, DC: U.S. Department of Education, National Center for Education Statistics.

²¹ Chute, A., Kroe, E., Garner, P., Polcari, M., and Ramsey, C.J. (2002). *Public Libraries in the United States: Fiscal Year 2000* (NCES 2002–344). Appendix C, Table 7. Washington, DC: U.S. Department of Education, National Center for Education Statistics.

PHASE I REPORT FINDINGS

HSPLS' Direct Impact on Hawaii Economy

Most citizens' understanding of what a library is and who it serves is shaped by their childhood experience. They may be surprised to learn that the majority of HSPLS' materials use (e.g., lending of books or video rentals) is by adults – 57%.²² They would be further surprised to learn HSPLS' direct impact on the economy of Hawaii. HSPLS' directly contributes over \$20 million a year to the economy of Hawaii in wages and salaries, building maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, fee based services and repair and maintenance. Table I-1 summarizes HSPLS' direct economic impact on the economy.

Activity	FY2001	FY2002
Wages & Salaries	\$15,781,116	\$17,176,699
Building Maintenance	\$270,200	\$347,100
Information Technology	\$29,900	\$37,800
Security Services	\$497,828	\$497,828
Travel ²³	\$41,240	\$35,972
Postage	\$176,455	\$259,604
Telecommunications	\$207,113	\$235,705
Electricity	\$1,333,262	\$1,308,320
Refuse Service	\$38,847	\$44,484
Equipment Rental	\$35,731	\$39,952
Repair & Maintenance	\$355,578	\$442,921
Fee based Services	\$42,110	\$243,151
Totals	\$18,809,380	\$20,669,536

Table I-2 supplies a breakdown of sources of HSPLS income for fiscal 2000 indicating 87.6% dependence on Department of Education budget from State General Fund. See Table II-1 for a more detailed look at sources of revenue for 2000.

Source of Income	Amount	% Total Income
State General Fund	\$20,332,611	87.6%
Fines	\$949,480	4.1%
Enhanced Services (these are designated)	\$574,939	2.5%
Federal Funds (principally LSTA)	\$825,724	3.6%
HSPLS Managed Trust Funds (these are designated)	\$71,293	0.3%
Friends (not controlled by HSPLS)	\$307,532	1.3%

²² In 2002 1,510,333 items circulated to children (21%), 1,576,501 to young adults (22%) and 4,068,812 to adults (57%). Data supplied by Vernon Tam using the previous HSPLS automated system.

²³ Includes inter-island and mainland travel.

²⁴ Data supplied by HSPLS except for Friends (Friends 2000 Treasurers report) and Foundation (PLDS 2001 Annual survey).

Foundation (not controlled by HSPLS)	\$161,007	1.7%
Total Income	\$22,754,047	100%
Total Income from State & Federal Taxes	\$21,158,335	91.1%
Total income from Fines, Enhanced Services & Trusts	\$1,595,712	6.9%
Total Income from Library Support Organizations	\$468,539	2.0%

HSPLS Market Value

The market value portion of the study sought to assess and communicate the HSPLS' value in new and more effective ways to key stakeholder groups. The following research questions were posed:

What would Hawaii resident pay in the commercial marketplace if they had to purchase the services HSPLS offers for free?

What is the taxpayer's return on state tax dollar investment in HSPLS?

How much does HSPLS save Hawaii residents and family on average annually?

The results are summarized in Table I-3. Note these data are for fiscal 2000-2001 and include only heavily used categories of library services.

Library Activity	Market Rate	2000 Use	2000 Market Value
Admissions (Walk in Patrons)	\$3.75	6,164,912	\$23,118,420.00
Materials Use	\$27.92 ²⁵	6,759,957	\$188,722,451.54
In Library Material Use	\$13.96 ²⁴	4,333,368	\$60,488,833.91
Hours of Reference Service	\$50.00/hr	133,510	\$6,675,500.00
Hours of Internet Workstation Use	\$12.00	120,016	\$1,440,192.00
Library Programs Attendance	\$5.00	262,188	\$1,310,940.00
Annual Total Market Value:			\$281,756,337.45
Annual State & Federal Tax Income:			\$21,158,335
Total Annual HSPLS Income:			\$22,754,047
Hawaii Population Served:			1,193,001
Return on Investment per \$1 Taxed:			\$13.32
Annual Savings for Individual:			\$218.44
Annual Savings for Average Family:			\$747.06

The study found that in fiscal 2000,

- If Hawaii residents had to pay commercial rates for the six most heavily used library services it would have cost them over \$282 million.
- If those services were considered traditional sales, HSPLS would easily make *Hawaii Business's* annual "Top 250 companies in Hawaii" list.
- The return on taxpayer investment in fiscal 2000 was over \$13 for every tax dollar invested in the library system.

²⁵ This is an average rate see Appendix I-5 for discussion.

- The average taxpayer paid \$17.74, about the price of a hardback bestseller, to support HSPLS. The average family saved over \$500 a year by using HSPLS services in 2000.

The market value study clearly demonstrates that HSPLS is a state government agency that works showing a high return on investment for its citizens and its families year after year.

Peer & National Norm Comparisons

Table I-4 summarizes the comparisons between HSPLS and peer library systems, Hennen's top rated library systems serving populations greater than 500,000,²⁶ peer states and national norms. Appendix I-6 provides the populations served for the peer library systems discussed. Appendix I-7 provides a detailed look comparing HSPLS and peer library systems. Appendix I-8 provides a detailed look comparing HSPLS and the top rated library systems serving populations greater than 500,000. Appendix I-9 provides a detailed look comparing HSPLS and peer states and national norms. The findings presented for the peer and national norm comparisons take a detailed look at three key areas: library finance, infrastructure and services.

²⁶ It is worth noting that of the top rated libraries, only Fairfax County public library's population served (962,800) comes close to that served by HSPLS. The top rated library systems all serve populations under one million while HSPLS is at 1.1 million. The average population served in this grouping is 704,583, 444,016 on average less than HSPLS' population served.

Table I-4 Summary of Peer & National Norm Comparisons					
Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
Population	1,193,001	1,047,924	704,583		
Total Income:	\$22,789,160	\$28,036,206	\$34,834,455		
Total Income per Capita	\$19.10	\$24.72	\$52.44	\$25.67	\$28.96
Infrastructure					
Staff					
Operating Expenditures					
Total Staff Expenditures:	\$16,505,580	\$16,311,364	\$20,400,741		
Staff % Total Operating:	73.80%	64.49%	62.47%		
Expenditure per Staff Member:	\$32,231	\$40,285	\$42,107		
Total Staff Expenditures per Capita:	\$13.84	\$14.02	\$28.95	\$16.05	\$16.96
Size of Staff					
ALA-MLS Librarians:	159	113.7	115.5		
Other Staff:	353.1	277.4	355.5		
Total Staff:	512.1	404.9	484.5		
Total paid FTE Staff/25,000 pop:	10.73	8.70	17.19	13.95	12.23
Collections					
Operating Expenditures					
Collection Expenditures:	\$2,113,805	\$3,686,509	\$5,692,923		
Coll. Exp. per Capita:	\$1.77	\$3.25	\$8.62	\$3.64	\$4.02
Coll. % Total Operating:	9.40%	15.02%	17.81%		
Size of Collections					
Book & Serial Volumes:	3,194,349	2,131,270	2,025,400		
Volumes per Capita:	2.68	1.87	3.04	4.14	2.86
Subscriptions:	5,881	5025	4,979		
Serials/1000 Population:	4.93			9.86	7.31
Video Materials:	48,289	68,251	93,263		
Videos/1000 Population:	40.48			100.87	83.21
Audio Materials:	204,490	85,418	143,435		
Audio/1000 Population:	171.41			108.81	119.89
E-Materials:	2,179	5,389	2,409		
Information Technology					
Operating Expenditures					
E-Access Operating Expenditures:	\$762,996	\$700,488	\$888,172		
E-Material Operating Expenditures:	\$148,169	\$251,966	\$273,620		
Size of Information Technology					
Public Internet Terminals:	180	259	314		
Public Internet Terminals/5,000 pop.	0.75	1.1	2.2	2.5	1.9
Staff-Only Internet Terminals:	167	265	384		
Library Services					
# Branch Libraries:	49	24	21		
Public Service Hours per Year:	100,220	63,169	64,385		
Hours per Branch:	2,045	2,645	3,089		
Library Visits:	6,300,736	3,280,801	4,916,280		
Visits per Capita:	5.28	2.82	7.16	4.87	4.31
Circulation:	6,947,968	5,727,617	10,688,945		
Circulation per Capita:	5.82	4.98	16.15	7.17	6.44
Children's Circulation:	2,275,951	2,013,674	3,665,794		
Children's Program Attendance:	184,340	138,771	170,476		
Reference Transactions:	1,207,804	1,290,728	1,583,440		
Reference Transactions per Capita:	1.01	1.11	2.25	0.80	1.1

Finance Comparisons

Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
Population	1,193,001	1,163,433	704,583		
Total Income:	\$22,789,160	\$28,036,206	\$34,834,455		
Total Income per Capita	\$19.10	\$24.72	\$52.44	\$25.67	\$28.96
How much additional annually would it take for HSPLS to match? ²⁷		\$6,701,433	\$39,775,854	\$7,830,404	\$11,760,149
How much per individual additional, annually, would it take for HSPLS to match? ²⁸		\$5.62	\$33.34	6.57	\$9.86

Table I-5 provides an overview of key peer library system, “best” library system, peer state and national norm total income data. Key findings are that:

- **HSPLS substantially under funded:** HSPLS would need \$5 to \$12 million annually to match peer, “best” or national norms.
- **HSPLS citizen contribution substantially below peer and national norms:** Restating the previous bullet in individual terms, every individual in Hawaii would need to contribute an additional \$6 annually to match peer library citizen contributions, \$10 annually to match national norms or \$33 annually to match “best” library citizen contributions. That is, annually, a Hawaii resident would have to contribute the price of a paperback additional to match national norms and the price of a hardback book additional to match the funding received by the nation’s “best” public libraries.

There has been recent, March 2003, acknowledgment that the library is under funded by Board of Education members. In a *Honolulu Advertiser* article,²⁹ Carol Gabbard, chairwoman of the Board of Education Library Committee, noted that “the libraries are under funded and have been for several years” and Board of Education Shannon Ajifu said the public has made it clear that libraries are a high priority. Yet the Legislature has under funded the library system year after year, even as the costs of operating the system have continually gone up.”

²⁷ Calculated by multiplying the total income per capita by the Hawaii population and then subtracting HSPLS income.

²⁸ Calculated by subtracting the HSPLS total income per capita from the total income per capita being considered.

²⁹ Hoover, Will. (2003, March 6). State librarian defended. *Honolulu Advertiser*.
< <http://the.honoluluadvertiser.com/article/2003/Mar/06/ln/ln11a.html>>

Infrastructure Comparisons

The data, shown in Table I-7 gives some guidance as to where HSPLS should place its revenue when it comes to such infrastructure issues as the collection, staff and technology.

Table I-7 Infrastructure Comparisons					
Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
# Branch Libraries:	49	24	21		
Population:	1,193,001	1,163,433	704,583		
Staff					
Operating Expenditures					
Total Staff Expenditures:	\$16,505,580	\$16,311,364	\$20,400,741		
Staff % Total Operating:	73.80%	64.49%	62.47%		
Expenditure per Staff Member:	\$32,231	\$40,285	\$42,107		
Total Staff Expenditures per Capita:	\$13.84	\$14.02	\$28.95	\$16.05	\$16.96
Size of Staff					
ALA-MLS Librarians:	159	113.7	115.5		
Other Staff:	353.1	277.4	355.5		
Total Staff:	512.1	404.9	484.5		
Total Paid FTE Staff per 25,000 Population:	10.73	8.70	17.19	13.95	12.23
Collections					
Operating Expenditures					
Collection Expenditures:	\$2,113,805	\$3,686,509	\$5,692,923		
Coll. Exp. per Capita:	\$1.77	\$3.25	\$8.62	\$3.64	\$4.02
Coll. % Total Operating:	9.40%	15.02%	17.81%		
Size of Collections					
Book & Serial Volumes:	3,194,349	2,131,270	2,025,400		
Volumes per Capita:	2.68	1.87	3.04	4.14	2.86
Subscriptions:	5,881	5025	4,979		
Serials/1000 Population:	4.93			9.86	7.31
Video Materials:	48,289	68,251	93,263		
Videos/1000 Population:	40.48			100.87	83.21
Audio Materials:	204,490	85,418	143,435		
Audio/1000 Population:	171.41			108.81	119.89
E-Materials:	2,179	5,389	2,409		
Information Technology					
Operating Expenditures					
E-Access Operating Expenditures:	\$762,996	\$700,488	\$888,172		
E-Material Operating Expenditures:	\$148,169	\$251,966	\$273,620		
Size of Information Technology					
Public Internet Terminals:	180	259	314		
Public Internet Terminal/5,000 Pop:	0.75	1.1	2.2	2.5	1.9
Staff-Only Internet Terminals:	167	265	384		

Staff Comparisons

Table I-8 Staff and Staff Cost Comparisons					
Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
Total Staff Expenditures:	\$16,505,580	\$16,311,364	\$20,400,741	\$19,147,666	\$20,233,297
Total Staff Expenditures per Capita:	\$13.84	\$14.02	\$28.95	\$16.05	\$16.96
How much additional annually would it take for HSPLS to match? ³⁰		\$220,328	\$18,036,975	\$2,637,314	\$3,727,717
Staff % Total Operating:	73.80%	64.49%	62.47%		
Expenditure per Staff Member:	\$32,231	\$40,285	\$42,107		
Total Staff Expend. per Capita:	\$13.84	\$28.95	\$30.44	\$16.05	\$16.96
Size of Staff					
ALA-MLS Librarians:	159	113.7	115.5		
Other Staff:	353.1	277.4	355.5		
Total Staff:	512.1	404.9	484.5		
Total Paid FTE Staff per 25,000 Pop:	10.73	8.70	17.19	13.95	12.23

Table I-8 provides an overview of key peer library system, “best” library system, peer state and national norm staff data. Key findings are that:

- HSPLS spends less on staff per capita on average by any comparison. Staff expenditures are close to current peer library systems but would have to increase by \$3,727,717 annually to match the national norm in 2000.
- Yet HSPLS uses 10% more of operating, 74% of the total, to expend what it does on staff. HSPLS staff spending as a percent of total operating should be in the 63% range to match peer and “best” library system averages.
- HSPLS has more ALA-MLS Librarians, and staff overall, than the average at peer or top rated library systems. This is not unexpected. HSPLS runs twice as many branches on average as peer or “best” library systems on average.
- In addition, HSPLS’ total paid staff per 25,000 is below peer state, national norm and “best” library system average indicating HSPLS does not have too many staff when compared to peer and national norms.
- HSPLS spends less on staff but has more staff. This suggests, as does the expenditure per staff member figures,³¹ that HSPLS staff, on average, are underpaid compared to all norms. This is made worse with Hawaii’s high cost of living.

The data suggest that an increase in staff compensation while decreasing the percent spent on staff from total operating may be needed should additional revenue permit. Staff reduction is not warranted, just better pay within the 63% for staff expenditure range of total operating.

³⁰ Figure calculated by multiplying the total staff expenditure per capita by the Hawaii population and then subtracting HSPLS income.

³¹ Expenditure per staff member was calculated by dividing staff expenditure by total staff.

Collection Comparisons

Table I-9 Collections Comparisons					
Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
Collections					
Operating Expenditures					
Collection Expenditures:	\$2,113,805	\$3,686,509	\$5,692,923		
Coll. Exp. per Capita:	\$1.77	\$3.25	\$8.62	\$3.64	\$4.02
How much additional annually would it take for HSPLS to match? ³²		\$1,765,617	\$8,169,864	\$2,228,719	\$2,682,059
Coll. % Total Operating:	9.40%	15.02%	17.81%		
Size of Collections					
Book & Serial Volumes:	3,194,349	2,131,270	2,025,400		
Volumes per Capita:	2.68	1.87	3.04	4.14	2.86
Subscriptions:	5,881	5025	4,979		
Serials/1000 Population:	4.93			9.86	7.31
Video Materials:	48,289	68,251	93,263		
Videos/1000 Population:	40.48			100.87	83.21
Audio Materials:	204,490	85,418	143,435		
Audio/1000 Population:	171.41			108.81	119.89
E-Materials:	2,179	5,389	2,409		

Table I-9 provides an overview of key peer library system, “best” library system, peer state and national norm collection data. Key findings are that:

- On its face, targeting more money for collection building seems unnecessary. HSPLS’ collection (in most areas, videos being the exception) on average is a third larger than peer library systems (over a third larger in books and serials larger than the “best” library systems).
- Yet HSPLS expenditures, expenditures per capita and collection expenditures as a percent of total operating are significantly lower than peer and “best” library systems.
- The average age of HSPLS’ collection is a factor. The State Librarian and other key staff suggest that HSPLS collection is older by comparison to its peers. Many library systems have active weeding programs to make their collections be current and to look as new as a bookstore. Similar weeding programs have not been possible at HSPLS.
- HSPLS would need \$2-\$3 million to match peer and national norm collection expenditures, \$8 million to match the “best” libraries.
- HSPLS’ media, video and e-materials collections are notably weak and deserve attention even within present budget constraints. For example HSPLS would have to increase its video collection by 41% to have comparable support to its peer systems. The problem here may be made worse by lack of funds to purchase equipment to use these non paper materials.

³² Figures calculated by multiplying the collection expenditure per capita by the Hawaii population and then subtracting HSPLS income.

- A good collection is a higher priority than normal (for peers, national norms or even the “best” libraries) given Hawaii’s geographic isolation and the resulting lack of interlibrary loan traffic outside of Hawaii.

Priorities here appear to be to address the under funding of media collections, to devote around 15% of operating to collections with a minimum \$2-3 million overall increase desirable.

Information Technology & E-Materials Comparisons

Table I-10 Information Technology & E-Materials Comparisons					
Operation Area	HSPLS	Peer Lib. Average	“Best” Lib. Average	Peer State	National Norm
Information Technology					
Operating Expenditures					
E-Access Operating Expenditures:	\$762,996	\$700,488	\$888,172		
E-Material Operating Expenditures:	\$148,169	\$251,966	\$273,620		
Size of Information Technology					
Public Internet Terminals	180	259	314		
Publ. Internet Terminals/5,000 pop.	0.75	1.1	2.2	2.5	1.9
How much additional annually would it take for HSPLS to match public Internet terminal distribution? ³³		\$1,328,844	\$2,660,392	\$2,982,503	\$2,266,702
Staff-Only Internet Terminals	167	265	384		

Table I-10 presents data related to information technology and e-materials. A principal problem faced by all public libraries is the lack of standardized comparable data for managerial decision making related to information technology. So comments here are brief and may not address the most pressing areas. For example, these data do not address such critical information technology areas as automated system upgrades, network servers, and telecommunications costs.

Workstations, for the public, and particularly for the staff, significantly lag behind both peer and “best” library systems (note this was 2000 data).³⁴ Nationally, libraries spend two and a half times as much on Internet workstations and peer states spent over three times as much as HSPLS did in 2000. HSPLS would need to acquire 79 workstations to have comparable support to the peer library system average and obtain 274 workstations to match the 2000 national norm. Overall HSPLS would need to spend between \$1-\$3 million annually to match peer and national expenditures just in this area of library

³³ Figure calculated by dividing the Hawaii population by 5000 and then multiplying by the public Internet terminals per 5000 figure and then multiplying by the cost per workstation figured at \$5,000.

³⁴ HSPLS partially addressed this disparity at the end of 2002 with current totals: PAC Internet 365; Thin client (Internet capable) 156; Gates donated workstations 147 for a total of 668 workstations.

information technology. In addition, both peer and “best” library systems invest significantly more in electronic materials for their collections than HSPLS does.³⁵

³⁵ HSPLS, recognizing this problem, created a special “new formats” fund allocating \$50,000 in fiscal 2001 and 2002. However no funding was available for fiscal 2003 or 2004 due to budget cuts.

Library Services Comparisons

Operation Area	HSPLS	Peer Lib. Average	"Best" Lib. Average	Peer State	National Norm
Population	1,193,001	1,163,433	704,583		
# Branch Libraries	49	24	21		
Public Service Hours per Year:	100,220	63,169	64,385		
Hours per Branch	2,045	2,645	3,089		
Library Visits:	6,300,736	3,280,801	4,916,280		
Visits per Capita:	5.28	2.82	7.16	4.87	4.31
Circulation:	6,947,968	5,727,617	10,688,945		
Circulation per Capita:	5.82	4.98	16.15	7.17	6.44
Children's Circulation:	2,275,951	2,013,674	3,665,794		
Children's Program Attendance:	184,340	138,771	170,476		
Reference Transactions:	1,207,804	1,290,728	1,583,440		
Reference Transactions per Capita:	1.01	1.11	2.25	0.80	1.1

Table I11 provides an overview of key peer library system, "best" library system, peer state and national norm library services data. Key findings are that HSPLS:

- Provides library services on par with peer library systems despite receiving \$5,247,046 or 23% less on average than its peer library systems.
- Maintains twice as many branches on average than its peer library systems.
- Is open on average 37% more total hours than its peer library systems although its individual branch hours are open less on average than compared libraries. This is because HSPLS maintains more branches than its peers. On an annual basis, on average, peer system branches are open 600 hours or 11.5 hours per week more than HSPLS branches. Note, these data are for fiscal 2000, prior to the HSPLS 2003 system wide reduction in branch hours of operation.
- Serves 47% more patrons annually on average than its peer library systems. This indicates higher demand for library services (based on the number of visits and visits per capita) than in peer library systems.
- Circulates 18% more material on average than its peer library systems.
- Answers library user reference questions on par with peer library systems and national norms.
- Have 8% more children on average attending children's programs than peer library systems.

In fiscal 2000, HSPLS delivers library services on par with peer library systems due to high user demand, valiant staff effort and professional management despite being substantially under funded. This is the lay person's equivalent of the volleyball team with the ripped and frayed uniforms who when its time to play remain unbeaten. Unfortunately, with deteriorating collections, over stressed staff expenditures and lagging information technology deployment such quality library service will not be maintained.

The following sub-sections discuss some of the possible areas for improvement suggested by the comparison data.

Public Service Hours

Increasing open hours are a strategic priority for many libraries. Yet on its face, there is no need, HSPLS is open 36-37% more than either peer or “best” library systems on average. But a revealing calculation is to look at the average number of hours open per branch.³⁶ This statistic suggests both peer and “best” library systems are on average open significantly more hours than HSPLS branches. On an annual basis, on average, peer system branches are open 600 hours or 11.5 hours per week³⁷ more than HSPLS branches. “Best” library system branches, on average, are open 1093 hours more annually or 21 hours per week. So the data actually suggest that this strategic priority may need to become a strategic necessity. This will be a particular challenge given present budget cuts.

Library Visits: Are Patrons Finding What They Want?

In a remarkable statistic, HSPLS patrons visit their libraries on average almost twice as often as peer library systems but not quite as often as patrons of “best” library systems. But are HSPLS patrons always finding what they want? It is interesting to look at the number of items circulated per visit³⁸ on average data: HSPLS: 1.10 items, Peer: 1.75 items, Best: 2.17 items. At the “best” libraries, people on average are leaving with two items (book, video, DVD, etc.) compared with only one at HSPLS visits. This may suggest that more attention is needed to collection building and reader’s advisory services in the future. Library users will find more of what they want with better collections and more staff to advise on the selection of materials.

Children’s Materials Use

Perhaps the most important thing to note, given the public’s perception that public libraries are for children, is that at all libraries compared adult materials use is greater than children’s. HSPLS, adult circulation accounts for 57% of materials use. HSPLS children’s circulation is ahead of the average of its peers but substantially behind the average of the “best” library systems.

Reference Service

Peer library systems on average do only 7% more reference business than HSPLS. The “best” library systems on average do 31%. HSPLS will need to project its reference collection and best reference staff expertise out from HSL across the islands for HSPLS to achieve best levels. The data suggest the virtual reference strategic priority has merit.³⁹

³⁶ Figure calculated by dividing the public service hours per year by the number of branches.

³⁷ Calculated by subtracting annual peer library system branch hours from annual HSPLS branch hours (600) and then dividing by 52 weeks in a year = 11.54 hours per week.

³⁸ Calculated: Circulation Total divided by # Visits.

³⁹ For further information see: Lipow, Anne Grodzins. (2003); *The virtual reference librarian's handbook*. NY: Neal-Schuman Publishers, Inc.

Peer & National Norm Summary

Key findings from the peer library system, “best” library system, peer state and national norm comparisons with HSPLS include:

- **Service demand high, delivery on par with peers, yet funding low:** Demand for HSPLS services are high and likely to increase. Historically, in tough economic times the demand for library services soars. HSPLS provides library services on par with peer library systems.
- **HSPLS is substantially under funded:** HSPLS would need \$7 and \$12 million annually to match peer library system, peer states or national norms.
- **Shortfall shows up in infrastructure not service delivery:** The revenue shortfall is most evident in infrastructure expenditures such as staff, collection development and information technology.
 - **Staff:** Staff expenditures would have to increase by \$3,727,717 annually to match the national norm in 2000.
 - **Collections:** Peer states spend twice as much annually on average on collections than HSPLS does -- \$2-\$3 million annually is needed to have comparable support.
 - **Information Technology:** Nationally, libraries spend two and a half times as much on Internet workstations and peer states spent over three times as much as HSPLS did in 2000. HSPLS needs 79 workstations to match the average peer library system and 274 workstations to match the 2000 national norm. That is approximately \$1,328,844 to match peer library system public Internet workstation averages. Note; the data do not address such critical information technology areas as automated system upgrades, network servers, and telecommunications costs.

The demand for HSPLS services remains high. The delivery of library services is on par with peer library systems throughout the U.S. Yet HSPLS suffers from an annual shortfall of \$7 and \$12 million. The shortfall shows up in the erosion of staff, collections and information technology infrastructure. A summary of the details follows.

HSPLS: Heavily Used, Offers Comparable Service

Area of Comparison	Hawaii	Peer Lib. Systems	“Best” Libraries	National Norm
# Branch Libraries	49	24	21	
Public Service Hours per Year:	100,220	63,169	64,385	
Library Visits:	6,300,736	3,280,801	4,916,280	
Library visits per capita	5.28	2.46	7.16	4.31
Circulation transactions	6,947,968	5,727,617	10,688,945	
Circulation transactions per capita	5.82	4.98	16.15	6.44
Reference transactions per capita	1.01	1.11	2.25	1.10

The comparative data, summarized in Table I-12, clearly indicate that HSPLS delivers quality services to its citizens on a par with peer library systems despite being significantly under-funded. HSPLS is:

- **Open more:** HSPLS maintains twice as many branches on average and is open 37% more hours overall annually than its peer library systems.
- **Serves more:** HSPLS serves 47% more patrons on average than its peer library systems and serves more people than those that visit their own libraries nationally, and in peer states and in the “best” library systems.
- **Use on par:** The use of materials and reference services is on par with peer library systems. HSPLS circulates 18% more material on average than its peer library systems.

But, the “best” public libraries answer twice as many reference questions and circulate almost three times as many books. This is because at the top rated public libraries the underlying infrastructure is better supported. At the “best” public library systems, users find more of what they need because there are more staff to serve, better quality reference and general collections, and more information technology in support. That is at HSPLS the issue is not the quality or dedication of its staff nor the professionalism of its management. The issue needing attention is the simple lack of funds to supply more and better paid staff, more and higher quality collections and needed information technology support.

HSPLS: Substantially Under-Funded

Area of Comparison	Hawaii	National Norm	Peer States	Peer Lib. Systems	“Best” Libraries
Total Income per Capita	\$19.10	\$28.96	\$25.67	\$24.72	\$52.44
Annual Amount Needed to Catch Up		\$11,760,149	\$7,830,404	\$6,701,433	\$39,775,854
Collection Expenses per Capita	\$1.77	\$4.02	\$3.64	\$3.25	\$8.62
Annual Amount Needed to Catch Up		\$2,682,059	\$2,228,719	\$1,765,617	\$8,169,864
Staff Expenses per Capita	\$13.84	\$16.96	\$16.05	\$14.02	\$28.95
Annual Amount Needed to Catch Up		\$3,727,717	\$2,637,314	\$220,328	\$18,036,975
Public Internet Terminal/5,000 pop.	0.75	1.9	2.5	1.1	2.2
Annual Amount Needed to Catch Up		\$2,266,702	\$2,982,503	\$1,328,844	\$2,660,392

Table I-13 summarizes the situation and what it would take annually to fund HSPLS on par with its peers or national norms. Key findings include:

- HSPLS received \$22,789,160 or \$19.10 per person to serve 1,193,001 Hawaii residents in fiscal 2000 the lowest per capita rate of those compared. Peer states received \$25.67 and the national norm is \$28.96.
- No matter how the study team viewed it, HSPLS was substantially under-funded compared to peer systems, peer states, national libraries or the “best” library systems. HSPLS needs an annual sustained increase in revenue of \$7-

\$12 million annually to have comparable support to its peers and national library norms.

HSPLS clearly provides library services on par with its peer library systems yet there are already signs of the underlying infrastructure eroding.

HSPLS: Already Evidence of Infrastructure Eroding

The data suggest that Hawaii public libraries cannot continue to meet the heavy demand and continue to provide services on a par with their peers or national norms without an increase in support. Simply, the current level of quality can not be sustained and can only erode at current funding levels. Already in 2000, libraries nationally spend twice as much as HSPLS does on videos, peer libraries three times as much. Nationally libraries are spending twice as much on Internet workstations and peer libraries three times as much. At the “best” library systems, users find more of what they need than they do at HSPLS because there is more staff to serve, better quality reference and general collections, and more information technology in support.

Peer Comparison Conclusion

The short story is HSPLS is a successful state government unit valiantly delivering library services that are in high demand on a par with its peers while being significantly under funded. The annual shortfall, from any point of comparison discussed here, and the already obvious consequences in such infrastructure areas as staff, collections and information technology, make a decline in service inevitable. A gem of a library system will simply slowly crumble due to lack of external support while citizen demand for library services remains high or increases.

Talk Story Data

The previous portions of this study focused on understanding HSPLS’ value has focused on income, expenditures and use using primarily numerical data. The portrait painted however is incomplete – what was the benefit or impact of HSPLS expenditures or HSPLS’ use? Researchers know that getting at the benefits or impacts of an organization is difficult. Indeed, a common comment by the talk story respondents was that it was impossible to value their public library—it was too immeasurably high.

The best way presently known to get at the benefit or impact of a library’s services is simply to ask library users directly. So we asked library users to “talk story” about the value of the library to them and we offered a small prize for the best story from each island and to the libraries submitting the best stories. HSPLS received 176 entries from 36 branches over a short period of time. The contest ran from approximately November 18, 2002 to January 10, 2003.⁴⁰ The researchers choose selected excerpts from the

⁴⁰ As of January 14, 2003 when the contest was closed the following branches had submitted entries: Aiea, Aina Haina, HSL, Kahuku, Kaimuki, Kalihi-Palama, Kaneohe, Liliha, Manoa, McCully, Mililani, Pearl City, Wahiawa, Waialua and Waipahu on Oahu; Bond, Hilo, Holualoa, Kailua-Kona, Kea’au, Kealahou,

responses received and arranged them by public library source (Appendix I-10) and by topic (Appendix I-11). Some good stories were too long to include here. The study team suggests that the reader might take the time to examine the stories selected. The users' stories and an important dimension otherwise missing from the findings presented so far.

The library is valued for a diverse array of reasons and purposes not fully explained in either the market value or peer comparison studies. As such, the excerpts provided in the Appendixes deepen and enrich our understanding of HSPLS' value to Hawaii citizens of all ages. In particular, the views presented begin to capture the benefits and impacts of HSPLS staff and services only hinted at by library use or comparison figures.

Laupahoehoe, Mountain View, Na'alehu, Pahoia and Parkeron on Hawaii; Koloa, Lihue, Princeville and Waimea on Kauai; and, Kahului, Kihei, Lahaina, Lanai, Makawao and Wailulu on Maui; and Molokai on Molokai.

PHASE I SUMMARY OF CONCLUSIONS

Phase I of this report addressed Hawaii Public Library System's (HSPLS) economic value focusing on four primary areas:

- **HSPLS' Direct Economic Impact:** The research question was: What is HSPLS' direct contribution to the economy of Hawaii?
- **HSPLS Market Value:** Research questions were: What would Hawaii resident pay in the commercial marketplace if they had to purchase the services HSPLS offers for free? What is the taxpayer's return on state tax dollar investment in HSPLS? How much does HSPLS save the Hawaii resident and family on average annually?
- **Peer Comparison:** Research questions were: How does HSPLS compare to peer systems serving populations within $\pm 15\%$ of the legal population served in Hawaii? How does HSPLS compare to the "best" library systems serving populations over 500,000? How does HSPLS compare with states serving populations of similar size? How does HSPLS compare to national norms?
- **HSPLS Value to Library Users:** How do library users self-describe the value HSPLS services? Not everyone expresses or understands the value of HSPLS using numbers. An alternative approach is to gather good stories and examples of HSPLS' value.

Principal findings from phase I were that HSPLS pumps \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, returning over \$13 to the Hawaii taxpayer in library services for every tax dollar invested, saving every person \$218 and saving the average Hawaii family \$747 a year. The study also found that HSPLS is seriously under funded compared to peer library systems, peer states or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to achieve support comparable to peer and national norms..

HSPLS Has a Positive Impact on Hawaii's Economy

HSPLS is a state government agency that served a population of 1,193,001 in fiscal 2000 pumping nearly \$20 million directly into the economy of Hawaii in wages and salaries, building maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, fee based services and repair and maintenance.

HSPLS Delivers High Market Value

The market value study asked what it would cost Hawaii taxpayers if they had to pay commercial market rates for selected, heavily used, library services that taxpayers presently obtain for an annual cost of less than the price of a hardback best seller. The results are summarized in Table I-3 (reproduced below). The study found that in fiscal 2000, if Hawaii residents had to pay commercial rates for the six most heavily used library services it would have cost them over \$282 million. If those services were considered traditional sales, HSPLS would easily make *Hawaii Business's* annual "Top 250 companies in Hawaii" list. The return on taxpayer investment in fiscal 2000 was over \$13 for every tax dollar invested in the library system. The average taxpayer paid \$17.74, about the price of a hardback bestseller, to support HSPLS. The average family saved over \$500 a year by using HSPLS services in 2000.

Library Activity	Market Rate	2000 Use	2000 Market Value
Admissions (Walk in Patrons)	\$3.75	6,164,912	\$23,118,420.00
Materials Use	\$27.92 ⁴¹	6,759,957	\$188,722,451.54
In Library Material Use	\$13.96 ³⁸	4,333,368	\$60,488,833.91
Hours of Reference Service	\$50.00/hr	133,510	\$6,675,500.00
Hours of Internet Workstation Use	\$12.00	120,016	\$1,440,192.00
Library Programs Attendance	\$5.00	262,188	\$1,310,940.00
Annual Total Market Value:			\$281,756,337.45
Annual State & Federal Tax Income:			\$21,158,335
Total Annual HSPLS Income:			\$22,754,047
Hawaii Population Served:			1,193,001
Return on Investment per \$1 Taxed:			\$13.32
Annual Savings for Individual:			\$218.44
Annual Savings for Average Family:			\$747.06

The market value study clearly showed that HSPLS is a state government agency that works showing a high return on investment for its citizens and its families year after year.

Peer & National Norm Comparisons

The peer comparison portion of the study asked how does HSPLS compare to: peer public library systems, the top rated public library systems nationally, states serving a similar population and, national norms. The study found that:

- HSPLS delivery of library services is on par with peer library systems;
- HSPLS is substantially under funded whether compared to peer library systems, the "best" public libraries, peer states or to national norms. It will take \$7 to \$12 million annually to match peer or national norm funding;

⁴¹ This is an average rate see Appendix I-5 for discussion.

- HSPLS infrastructure, including staff, collections and information technology, is already seeing erosion.

Without additional funds, ongoing infrastructure erosion will force service curtailment and failures despite HSPLS' valiant efforts to meet Hawaii citizens' needs.

HSPLS: Heavily Used, Offers Comparable Service

HSPLS serves 47% more patrons on average than its peer library systems and serves more people than those that visit their own libraries nationally, and in peer states and in the "best" library systems. HSPLS maintains twice as many branches on average and is open 37% more hours overall annually than its peer library systems. The use of materials and reference services is on par with peer systems and states and the national norm. HSPLS circulates 18% more material on average than its peer library systems. The "best" libraries are used slightly more, but they answer twice as many reference questions and circulate almost three times as many books. At the "best" libraries people find more of what they need because there are more staff to serve, better quality reference and general collections, and more information technology in support.

HSPLS: Substantially Under-Funded

Area of Comparison	Hawaii	National Norm	Peer States	Peer Lib. Systems	"Best" Libraries
Total income per capita	\$19.10	\$28.96	\$25.67	\$24.72	\$52.44
Annual Amount Needed to Catch Up		\$11,760,149	\$7,830,404	\$6,701,433	\$39,775,854
Collection expenses per capita	\$1.77	\$4.02	\$3.64	\$3.25	\$8.62
Annual Amount Needed to Catch Up		\$2,682,059	\$2,228,719	\$1,765,617	\$8,169,864
Staff expenses per capita	\$13.84	\$16.96	\$16.05	\$14.02	\$28.95
Annual Amount Needed to Catch Up		\$3,727,717	\$2,637,314	\$220,328	\$18,036,975
Public Internet Terminals per 5,000 Population	0.8	1.9	2.50	1.11	2.23
Annual Amount to Catch Up		\$3,727,717	\$2,637,314	\$220,328	\$18,036,975

No matter how the study team viewed it, HSPLS was substantially under-funded compared to peer systems, peer states, national libraries or the "best" library systems. The data suggest that HSPLS needs an annual sustained increase in revenue of \$7-\$12 million to achieve support comparable to peer and national library norms. To put this in perspective, in the year 2000, on average, each Hawaii resident paid \$19.10 per year for library service. Not even the cost of a hardback best seller. HSPLS would need each resident of Hawaii to pay \$5.62 more a year than they do at present to have comparable support to the level of its peers. That is less than the price of a paperback book to become competitive with peer library systems nationally. Double that, at \$9.68, to be on par with national norms. At a total annual contribution of \$25-\$29 per resident, now that's the

⁴² Assumes HSPLS fiscal 2000 population served of 1,193,001, income of \$22,789,160, amount spent on the collection of \$2,113,805, amount spent on staff of \$16,505,580 and amount for single workstation purchase, access & maintenance of \$5000.

price Hawaii residents can live with to move up to a bestseller library system. Table I-13 summarizes the situation and what it would take annually to fund HSPLS on par with its peers or national norms.

In sum, HSPLS is a small, efficient, successful state government agency delivering a high return on taxpayer investment to the citizens and families of Hawaii that is significantly under funded. Already, libraries nationally spend twice what HSPLS does on videos or on Internet workstations, peer libraries three times as much. At the “best” libraries nationally, users find more of what they need than at HSPLS because there are more staff to serve, better quality reference and general collections, and more information technology. Imagine the value HSPLS could provide to Hawaii if properly supported.

PHASE I NEXT STEPS

The study team's analysis leads to two paradoxical conclusions. On the one hand, Hawaii public libraries are a great value for citizens saving them on average \$218 a year and saving the average Hawaii family \$747 a year, a return to the Hawaii taxpayers of over \$13 for every tax dollar invested. Citizens have figured this out and Hawaii public libraries are heavily used compared to its peers. On the other hand, by any peer measure, HSPLS is significantly under funded with an annual shortfall of \$7 to \$12 million using peer and national norms (\$40 million when compared to the “best” library systems). Clearly the use and value of Hawaii public libraries is out of step with their funding. This leads us to the logical question what can be done to raise \$7 to \$12 million annually in sustainable, recurring, HSPLS revenue?

The State Librarian believes that a partial solution may lie in the diversification of the sources of revenue supporting HSPLS. At present, nearly 90% of HSPLS funding comes from state government. The State Librarian asked the study team to focus its efforts during phase II of the project on additional ways that HSPLS can raise the \$7-\$12 million in revenue annually that is necessary to close the budget gap between HSPLS and its peers and national norms. The study team reports on the results of this effort next. But before we proceed, the study team would like to call attention to three tasks necessary to generating revenue from additional revenue sources that repeatedly surfaced during Phase I and were found to be less than effective at HSPLS. These tasks are:

- **Proving to funders that HSPLS addresses their concerns:** HSPLS’ principal argument in the past when making a funding request all too often has been “trust me, trust me, we have been around along time and do good things.” That approach is no longer sufficient. Funders are demanding and getting from the competition proof that their concerns are being effectively addressed. The Phase I effort should demonstrate to HSPLS senior managers that HSPLS does not have an effective unit to design studies to collect or analyze data in response to such funder demand for evidence. This is not data for library management but data for dollars. HSPLS will need to increase its capacity to collect the evidence needed to convince funders that HSPLS is responsive to their interests.
- **Telling your story:** Once you have the evidence funders demand it must be crafted into an effective story and then delivered repeatedly, in different ways to ensure that it will be heard. No modern HSPLS’ sized commercial business can afford to be without an effective advertising and public relations unit or access to one via outsourcing. How can HSPLS afford to be without effective capacity in this area?
- **Prospecting & development:** Seeking, maintaining and coordinating revenue from additional sources cannot be a one time event. Each additional revenue source tapped will require identification and the same care and nurturing given to the various state funding entities. New revenue’s use must be planned

for, coordinated and integrated with other revenue streams, managed, etc. These tasks require dedicated staff. For example, even small colleges have prospecting and development offices these days. HSPLS must address these demanding tasks if it hopes to seek or compete for funds on a sustained basis from any additional revenue source identified next in the Phase II report.

There is a theme here. HSPLS must devote the same amount of attention and deploy the equivalent amount of scarce resources to the task of identifying funders and keeping them satisfied as HSPLS has successfully done for its library users. HSPLS users know they have good deal. HSPLS must now convince potential funders that they to will get a good deal. Attention to the above tasks is the first steps in that process.

Recommended Use of Report Data

The Phase I report's data will be of use for a number of purposes and with a number of key stakeholders including: the governor, legislative and budget committees, an annual report brochure, the project advisory committee, the Board of Education (see Appendix I-12), the press (See Appendix I-13), HSPLS branch managers and staff (see Appendix I-14), and the HSPLS Friends and Foundation (see Appendix I-15) as well as others as appropriate. The study team have drafted brief summaries, included here has appendices, for potential use.

PHASE II REPORT: ADDITIONAL SUSTAINED SOURCES OF REVENUE

INTRODUCTION

This section of the final report, Phase II of the study, considered ways that HSPLS might address the annual revenue shortfall when compared to peer and national norms identified in the Phase I section. A few suggestions are made regarding efforts to increase funding from the present principal source – State Department of Education funds. However, the assumption is that revenue from this source will be flat or declining.⁴³ The State Librarian notes, "...with additional cuts being planned or discussed, and with an even higher percentage of our general fund going to salaries, we know we can no longer conduct business as usual and that we must embark on a different path to accomplish our mission."⁴⁴ Thus the focus was on additional sources of revenue. The principal research question was:

What additional sources of sustained revenue commonly used by other public libraries in the U.S. should HSPLS consider to reduce the \$7-\$12 million annual shortfall in revenue HSPLS faces compared to peer library systems, peer states and national norms?

The study considered five principal additional sources of revenue:

- **Library support organizations:** What is the current role and future potential of the Hawaii Library Foundation and Friends of the Library of Hawaii? What suggestions can the study team offer to the Foundation and Friends management based on experience with other Library support organizations throughout the U.S.?
- **Federal state or local government tax assessment alternatives:** What are additional federal, state and local government tax assessment mechanisms used by other libraries in the U.S. that HSPLS might consider?
- **Intergovernmental revenue or in kind transfer:** What in kind support do other public libraries receive from their county and local governments?
- **Corporate support:** What has been peer library experience been with raising sustained support from corporate sources?
- **HSPLS enhanced services or retail operations:** Are there enhanced services or retail activities used by other public libraries in the U.S. that HSPLS should consider?

The intent of this section of the report is to provide HSPLS planners with a clearer picture of the additional sources of revenue options available. Few of the options suggested can be fully implemented immediately. But small steps can be begun immediately to position the library should it wish to employ each revenue source identified here in the future.

⁴³ Declining revenue is not limited just to Hawaii libraries but a subject of concern to libraries throughout the U.S. See for example, American Library Association. (2003). Campaign to save America's libraries tool kit. Chicago: ALA. <http://www.ala.org/pio/csal_toolkit.html>.

⁴⁴ (2003, January 21). Funds for Kapolei library sought. *Honolulu Star Bulletin*. <<http://starbulletin.com/2003/01/21/news/story4.html>>

Some of the revenue sources mentioned here may require incremental, staged, multi-year activity with a good deal of coordinated external support, e.g., increasing local government support. But the payoff is potentially great. The best use of the material presented here is to generate a systematic plan for obtaining, managing and deploying the additional revenue sources with the most utility in the HSPLS context.

METHOD SUMMARY

The study team began Phase II by identifying likely additional sources of sustained revenue through consultation with the State Librarian, examination of a special survey conducted by PLDS in 2000,⁴⁵ library literature and the researchers' experience. Next, data on peer library use of additional sources of revenue were explored via examination of peer library web sites and e-mail and phone interviews. Appendix II-1 provides examples of the questions asked of peer libraries regarding additional sources of revenue. Individual and group interviews were then conducted with a sample of key Hawaii decision makers to explore the feasibility of HSPLS tapping various additional sources of revenue over the next several years in the end of March (we hope). See Appendix II-2 for a basic script followed during these interviews. Appendix II-3 is a survey instrument to be given to each of the interview participants. Finally, the additional revenue sources investigated will be presented to the State Librarian and summarized with recommendations in a written report.

Chronology of Principal Phase II Activities

January 2003 Planning begun for Phase II of the study focusing on additional sustainable sources of revenue

February 10-12 McClure site visit focused on assessing Friends and Foundation and offering advice to these organization based on similar organizations throughout the U.S. McClure briefed HSPLS senior management on selected local government taxation models and other means of support.

February 26: Phase II Interim Report 1 outlines findings from McClure visit, preliminary assessment of peer library documentation and other findings in a format similar to the final report document. Planning for Ryan site visit begun. The purpose of the interim report was to provide a status report to HSPLS and allow HSPLS an opportunity to redirect focus, comment on efforts to date and correct factual errors.

February-April Ryan evaluates peer library use of additional sources of revenue using peer library web site data, e-mail contact and telephone interviews.

⁴⁵ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

April 29-May7 Ryan site visit to assess applicability of various additional sources of revenue in the HSPLS context by interviewing a sample of relevant key Hawaii decision makers.

FINDINGS

Identifying the Range & Diversity of Potential Additional Revenue Sources

The study team examined the PLDS 2001⁴⁶ special survey on public library finance as part of a process to identify the range and diversity of additional sources of revenue and likely annual income to be expected from each additional source. Table II-1 presents in summary form the highlights of this investigation. Table II-1 shows, for fiscal 2000, HSPLS revenue from a range of additional revenue sources, the maximum revenue generated (of the peer libraries reviewed), the peer library generating the highest revenue in each category, the peer library average (HSPLS not included), and the difference between the peer average and HSPLS (a negative number indicates that the peer average revenue is higher than the HSPLS revenue). Appendix II-4 provides complete data on the peer libraries studied for the PLDS survey. The data served as the basis for discussions with various peer libraries as to their use of additional revenue sources. The report of these discussions is incorporated in the various sections that follow.

The data presented in the PLDS 2000 special survey is useful for two principal reasons. First, the data define a universe of the principal additional revenue sources currently used by U.S. public libraries. Second, it gives some sense of the maximum annual sustained revenue possible and how HSPLS currently compares. Respondents to the survey appear to have had some difficulty answering the survey. For example, the report indicates that HSPLS had no book sale (it is probably under the Friends). So one must be cautious as to the actual revenue amounts presented. The survey does, represent a useful beginning point.

⁴⁶ Public Library Association. (2001). *Public Library Data Service Statistical Report 2001: Special Survey on Finance*. Chicago: American Library Association Division: Public Library Association. <<http://www.pla.org/plds.html>>.

Table II-1 Peer Library Revenue Summary Based on PLDS 2000 Survey Data⁴⁷					
Library Name:	HSPLS	Maximum Revenue by Peer Libraries	Library with Maximum Revenue	Peer Averages	HSPLS Difference from Peer Average
Government Income					
LSTA	\$861,635	\$861,635	HSPLS	\$129,610	\$732,026
E-rate	\$90,153	\$400,000	Broward	\$132,951	-\$42,798
Other Federal	\$0	\$600,000	Broward	\$118,544	-\$118,544
County	\$0	\$31,136,873	Broward	\$9,274,286	-\$9,274,286
City/Municipal	\$0	\$24,741,107	San Diego County	\$9,275,483	-\$9,275,483
Friends, Foundations, Individual Contributions					
Library Foundation: Capital	\$467,000	\$26,872,000	Philadelphia	\$5,869,587	-\$5,402,587
Library Foundation: Annual Income	\$348,893	\$11,403,000	Philadelphia	\$1,951,199	-\$1,602,306
Library Foundation	\$161,007	\$1,900,000	Broward	\$493,166	-\$332,159
Library Endowments	\$0	\$1,724,253	Dallas	\$497,305	-\$497,305
National Foundation /Endowment	\$0	\$1,393,450	Philadelphia	\$316,828	-\$316,828
Other Foundations	\$0	\$1,987,913	Philadelphia	\$428,768	-\$428,768
Friends	\$371,956	\$414,916	Denver	\$150,591	\$221,365
Book Sales	\$0	\$123,342	Baltimore	\$53,524	-\$53,524
Corporate, Individual, Special Event					
Corporate Sources	\$0	\$435,068	Houston	\$177,970	-\$177,970
Special Events	\$0	\$481,858	Philadelphia	\$175,565	-\$175,565
Individual/Group Contributions	\$10,000	\$899,445	Denver	\$274,278	-\$264,278
Enhanced Services					
Fees	\$131,161	\$591,000	Miami	\$111,481	\$19,680
Overdue Fines	\$931,738	\$1,315,239	Baltimore	\$693,638	\$238,100
Retail Outlets	\$0	\$240,860	Multnomah	\$89,677	-\$89,677
Product/Service Sales	\$9,609	\$195,869	Baltimore	\$79,995	-\$70,386
Contract Services	\$0	\$671,805	Las Vegas	\$254,434	-\$254,434
Vending	\$0	\$2,531,173	Baltimore	\$227,301	-\$227,301
Rental	\$412,760	\$412,760	HSPLS	\$64,845	\$347,915
Commission	\$0	\$127,679	Dallas	\$23,630	-\$23,630
Interest/Investment Income	\$60,000	\$930,000	Miami	\$346,193	-\$286,193
Total All Sources	\$3,855,912			\$14,442,154	-\$10,586,242

⁴⁷ Public Library Association. (2002). *Public Library Data Service Statistical Report 2001: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

Friends of the Library

The Friends of the Library of Hawaii⁴⁸ “are an active group of library users who have supported Hawaii's public libraries through legislative testimony and funding for programs, equipment, and staff training” for over 100 years. The legislature permits the Friends to conduct commercial enterprises, such as successful book sales, on library property.⁴⁹ Friends also have provision for managing endowment funds. There is also one island Friends group, the Maui Friends of the Library⁵⁰ founded in 1912, and a number of local Friends groups (often referred to as little friends). The consultants have not had the opportunity to meet with smaller, island or Branch, Friends groups. The legislature permits the Friends to conduct commercial enterprises, such as successful book sales, on library property.⁵¹

McClure met with the Executive Director of the Friends in the morning and with the Executive Director and three members of the Board for lunch on February 12, 2003 to review the status, operation, opportunities, and challenges facing the Foundation. Prior to this meeting, Ryan had met with the Executive Director and various Board members on several occasions, McClure conducted a telephone interview with the Executive Director, and both consultants had reviewed a number of reports and Friends documents/literature.

The Friends have developed a successful organization that regularly contributes some \$200,000 - \$300,000 in direct support to HSPLS annually. Their programs and activities are well-respected and overall the Friends are reaching a level of organizational maturity that can allow them to go beyond basic fundraising activities. The consultant congratulated the Executive Director and the Board members on their success and suggested it was time for the Friends to move to the next level of success. This level would include the following strategic efforts:

- *Maintain the present fundraising efforts at their current level, solidify and coordinate existing fundraising efforts and programs, be careful about establishing new initiatives, improve the quality and impact of the existing efforts.*
- *Advocacy, Develop a strong political presence in the state with a renewed effort in advocacy and education regarding HSPLS via the Friends.*⁵² This

⁴⁸ Hawaii Friends of the Library <<http://www.hcc.Hawaii.edu/hspls/friends.html>>.

⁴⁹ H.B. 0611, H.D. 1 (Act 106) - Relating to Concessions at Public Library Facilities. The act provides Friends of the Library of Hawaii the same privileges as the Hawaii State Library Foundation to conduct for-profit enterprises at State library facilities and to deposit the net proceeds of those enterprises into their respective trust funds. Act signed into law on Friday, May 18, 2001.

⁵⁰ Maui Friends of the Library <<http://www.maui.net/~mfol/>>.

⁵¹ H.B. 0611, H.D. 1 (Act 106) - Relating to Concessions at Public Library Facilities. The act provides Friends of the Library of Hawaii the same privileges as the Hawaii State Library Foundation to conduct for-profit enterprises at State library facilities and to deposit the net proceeds of those enterprises into their respective trust funds. Act signed into law on Friday, May 18, 2001.

⁵² For general guidance in advocating without jeopardizing non-profit status see: Guy, David J. Library advocacy: Legal limits on lobbying. California Library Friends. <<http://www.friendcalib.org/newsstand/f2guy1.htm>>.

will require a significant training/educational effort that is carefully developed and administered to the Friends.⁵³ The effort should target local and state government officials and provide a means to support HSPLS goals, maintain or increase funding⁵⁴ and educate residents about the importance and impact of library services.

- *Implement an ongoing evaluation of program awards.* Generally there is no ongoing evaluation of the success, impact, outcomes, or benefits that have resulted from the various program awards that have been made by the Friends. Such an effort is essential to:
 - Determine if the awards made by the Friends are “making a difference” and have had significant impact
 - Help the Friends make awards that will have the greatest impact in the future
 - Provide the Friends with data and examples of the success of their programs that can be used to support additional fundraising.
 - The Friends may wish to obtain additional assistance in how to establish such an evaluation effort from HSPLS staff or a local consultant. Basically, program proposals from libraries should include an evaluation component and Friends staff should determine at the completion of the program the degree to which the evaluation was completed successfully. There are numerous sources that the Friends can draw upon to provide basic information on how to do this.⁵⁵
- *Coordinate program activities with HSPLS.* Given the very tight budget situation from the state regarding support for HSPLS, the Friends must better coordinate their awards and program activities with the strategic directions and goals of the state library. Friends program awards and other related effort should be directly related to these strategic directions established by the state library.
- *Better coordinate the state Friends with local Friends groups.* It was unclear to the consultant how the various Friends groups are strategically linked to leverage each other’s activities and fundraising. If the Friends (both statewide and local) are to have a strong advocacy role they need to be better coordinated and organized.

⁵³ See for example: *Library Advocate’s Handbook* . (2000). 2nd edition. Chicago: American Library Association <<https://cs.ala.org/@yourlibrary/advocacy.cfm>> various pages of examples and strategies from the Friends of Libraries USA web page at: <<http://www.folusa.org>>, see for example their basic *Checklist for advocacy* <<http://www.folusa.org/html/fact13.html>>; Turner, Anne M. (1997). *Getting political: An action guide for librarians & library supporters*. NY: Neal-Schuman Publishers; Craft, Mary Anne. (1999). *The funding game: Rules for public library advocacy*. Lanham, MA: The Scarecrow Press, Inc.; Gardner Reed, Sally. (2001). *Making the case for your library: A how-to-do-it manual*. NY: Neal-Schuman.; and, Libraries for the Future. Advocacy access <<http://www.lff.org/programs/advocacy.html>>. For a model state site, see Friends and Foundations of California Libraries. *Advocacy Center for California Libraries*. <<http://www.friendcalib.org/calad/>>.

⁵⁴ Advocacy can have a significant impact on maintaining or increasing funds. For example, see: Friends Saint Paul Public Library. Advocacy. <<http://www.thefriends.org/advocacy.htm>>.

⁵⁵ A number of excellent introductory sources on evaluation can be found at: <http://dlis.dos.state.fl.us/bld/Research_Office/evaluation.html>.

- *Improve the Friend's web site.* The Friends web site is extremely limited, provides inadequate information about the Friends, what it does, and how people can support the Friends⁵⁶ – and thus, is in desperate need of a major redesign. For examples, see the Resources section later in this report.
- *Invest in Friends Infrastructure.* The Friends organization needs more organizational support than is currently available. For the Friends to move into the next level of maturity they will need to increase staffing and/or contract out work for the development of educational modules for advocacy, managing the web site, etc.

The consultant discussed the above recommendations with the Friends' Executive Director and the Board members present at lunch and there was general agreement in moving in these directions. There is great potential for the Friends to move beyond its current success and reach a higher level of impact to support statewide library services and programs. See Appendix II-5 for potential resources of interest from Friends organizations at peer libraries.

Library Foundation

The Hawaii Library Foundation (HLF)⁵⁷ “is a private nonprofit Hawaii corporation, founded in 1993 to promote reading, literacy and life-long learning in Hawaii. All charitable contributions and profits from entrepreneurial projects support Hawaii's Public Library System. Legislation passed in 1994 permits the Foundation to conduct commercial enterprises on library property and retain the proceeds for deposit into a trust fund.” Commercial activities included an espresso cart outside the lobby of the Hawaii State Library in the past. HLF's principal fundraiser is the annual Marriott Links to Literacy Golf Tournament which generated \$80,000 in net proceeds in 2002. HLF supports various library activities and manages library endowment and trust funds.

McClure met with the Executive Director and five members of the Board of the Library Foundation on February 11, 2003 to review the status, operation, opportunities, and challenges facing the Foundation. Prior to this meeting, Ryan had met with the Executive Director and Board on several occasions, McClure conducted a telephone interview with the Executive Director, and both consultants had reviewed a number of reports and Foundation documents/literature.

McClure provided background information regarding public library foundations and left packets of information and program activities from the San Antonio Public Library foundation,⁵⁸ the Grand Rapids Public Library Foundation,⁵⁹ and the

⁵⁶ For tips on how the web can be used by the Friends, see: Corson-Finnerty, Adam & Blanchard, Laura. (1998). *Fundraising and friend-raising on the web: A handbook for libraries and other non-profit organizations*. Chicago: ALA Editions. See also Corson-Finnerty's web site <<http://www.fund-online.com/>>.

⁵⁷ Hawaii Library Foundation (HLF) <<http://www.hcc.Hawaii.edu/hspls/libfound.html>>.

⁵⁸ San Antonio Public Library Foundation 315 E. Commerce St., Suite 210 San Antonio, TX 78205-9976 Phone: (210) 225-4728 Fax (210) 444-1950 E-mail: legsaplf@dcc.com

Indianapolis-Marion County Public Library Foundation.⁶⁰ These constituted a significant collection of representative documents and information about successful library Foundation operations. McClure discussed example library foundations and their activities and also provided the Executive Director with sources for additional information about successful fundraising and operating Foundations.⁶¹ See Appendix II-6 for potential resources of interest from Foundations at HSPLS peer libraries.

After initial discussions with the Executive Director and the Board members present regarding the Foundation, McClure summarized the current situation of the Foundation as:

The Foundation is largely disorganized, provides relatively little direct support to HSPLS, has an unclear mission, has competing views among Board member regarding what it should or should not be doing, and has limited visibility in the state;

A number of the members of the Board are unable to commit meaningful support and time working on Foundation activities;

The Golf Tournament fund raiser is the major money-maker for the Foundation and has been quite successful;

The overall Foundation endowment (approximately \$1 million) and the money it generates is small;

The Foundation wastes considerable time and effort on funding little projects, small proposal support/awards to libraries, and generally does not “think big;”

The Foundation web page⁶² is extremely limited, provides inadequate information about the Foundation, what it does, and how people can support the Foundation – and thus, is in desperate need of a major redesign.

The primary role of the Foundation is to raise money to enhance and improve the quality of library services statewide, NOT to second guess HSPLS on how to manage library services.

Generally, the Executive Director and the Board members present agreed with this assessment.

Based on these discussions, the consultant identified a number of possible options as to future directions that the Foundation might consider:

Option #1: Declare victory and dissolve the Foundation. In this option, the Foundation would dissolve itself, arrange for the management of its resources and endowment by some other entity, and go out of business. This option assumes that the Foundation

⁵⁹ Ryerson Library Foundation <<http://www.grapids.lib.mi.us/info/rlf.html>> 111 Library Street N.E., Grand Rapids, MI 49503 (616) 988-5399.

⁶⁰ Indianapolis-Marion County Library Foundation <<http://www.imcpl.lib.in.us/found.htm>> P.O. Box 6134 2450 N. Meridian Street Indianapolis, IN 46206-6134 (317) 269-5202.

⁶¹ For example: *An Introduction to Public Library Foundations* <http://www-wsl.state.wy.us/slpub/foundations/toc.html> (practical step by step strategies for a successful foundation); Example web pages from successful Public Library Foundations; and James Swan, *Fundraising for Libraries: 25 Proven Ways to Get More Money for Your Library*. (2002). New York: Neal Shuman.

⁶² Foundation web site <<http://www.hcc.Hawaii.edu/hspls/libfound.html>>

cannot get itself better organized, is unable to establish a clear and credible presence in the state, cannot clarify its mission and priorities for fundraising, and cannot better differentiate itself from what the Friends are doing.

Option #2: Merge with the Friends. There have been discussions about such an option but they have been inconclusive. In the view of the consultant, a merger is not likely to occur. The Friends are a vibrant organization with a number of very successful activities in place and a relatively clear public understanding as to what they do and visible presence in the state. There is little for the Friends to gain (except wealthier board members and possible control of the endowment) from the Foundation except a number of organizational problems.

Option #3: Reinvent the Foundation. In this option, the Foundation takes stock of its current situation, identifies its strengths and weaknesses, clarifies its mission and activities, and clearly differentiates itself from the Friends in terms of what it does regarding fundraising. It develops a clear statement of what it intends to do and how it will do it and positions itself strategically to be highly credible and effective in large-scale fund raising.

The sense of those present at the meeting was to accept Option #3 as a means of developing the Foundation.

In the discussion of how best to implement Option #3 the consultant discussed the need to clearly differentiate the activities and purpose of the Foundation from that of the Friends. The discussion identified the following possibilities for differentiation:

The Foundation should focus on “high-end” fundraising targeted at the private sector and the social/cultural/political leaders of the state as well as those with known ties to the state.

Fundraising activities should be directed toward large special events (like the golf tournament) and various galas associated with unique programs and celebrations of library-related events.

The Foundation should stop soliciting proposals from libraries and stop making small awards to libraries for day-to-day library activities – this is best done by the Friends.

The primary goal of the Foundation should be to build the endowment.

There was considerable discussion about how best to begin the process of reinvention. Generally, there was the sense that it would take 12-18 months to re-organize the Foundation, build an adequate organizational infrastructure, and present a public image of a “new, visible, credible, and invigorated” Foundation. The sense of the group was to take this amount of time to reinvent itself, hire assistance from a facilitator to help them manage this process, and then at the end of 18 months announce a large capital development plan to raise \$20 million (or some amount) over the next 5-8 years. A key factor in the likely success of this effort would be the degree to which the Foundation could attract Board members who could commit time, resources, and ideas to reinventing the Foundation.

The consultant suggested that for the Foundation to be successful in such an endeavor it would need to invest in itself. That is to use some of its resources to build a better organizational infrastructure, to obtain training and education for Foundation staff, and to perhaps add additional Foundation staff or contract out some work – such as the development and management of the web site.⁶³ The consultant noted that professional Foundation staff are oftentimes specially trained, have specific fund raising skills, and have unique people/organizational/managerial skills to direct Foundations. It is unclear to the study team whether the Foundation staff and Board members have these skills.

To some degree, the Foundation staff and Board members will need to agree to agree and to agree to disagree when needed if they are to move forward. The multitude of ideas, opinions, and proposed activities needs to be much more focused into a feasible strategic plan. It was clear to the consultant that some of the Board members do not clearly understand the role of a Board member on a Foundation. Further, the Foundation is responsible for itself and its activities. It should not expect direct support or day-to-day involvement/guidance from the HSPLS staff.

Overall, the Executive Director and the Board of the Foundation have serious and critical decisions to make in the months ahead should they decide to reinvent themselves. The effort will require hard work, strategic planning, a commitment from the Board members, and the development of new skills and knowledge on the part of Foundation staff. Change is, however, essential. The Foundation should not continue to operate as it does currently and requires a major reorganization – the extent to which is beyond the scope of the current project.

Government Taxation Options

There is general recognition among the HSPLS senior management team that seeking a change in state or local or direct tax support for public libraries would be a fundamental change. That is to advance such a proposal, some of the hurdles that would need attention include:

- Government and citizen expectations of government obligation would need a conceptual change;
- Money would need to be found from local government sources every bit as strapped as the state government;
- An appropriate tax mechanism/apparatus from those identified in this report (or elsewhere) would need to be selected;
- Appropriate legal approvals would need to be obtained for the tax mechanism/apparatus chosen;
- Assurances would need to be legally codified such that a change in revenue from one funding source would not affect other funding sources'

⁶³ For tips on how the web can be used by the Foundation, see: Corson-Finnerty, Adam & Blanchard, Laura. (1998). *Fundraising and friend-raising on the web: A handbook for libraries and other non-profit organizations*. Chicago: ALA Editions. See also Corson-Finnerty's web site <<http://www.fund-online.com/>>.

contributions. For example, a new county level tax should not mean a commensurate reduction in state funding;

McClure met with four administrative staff to review options and strategies for developing additional sustainable funding for HSPLS. Reported here are options that specifically relate to federal, state or local government taxation including establishing an independent taxation authority.⁶⁴ At the outset, McClure made it clear that all of the various strategies were long-range efforts for which a strategic plan would have to be developed by HSPLS staff. The various options that might be considered include the following possibilities.

Federal Options

Congressman Ed Case. The newly elected (January 4, 2003) Representative can be a useful advocate for HSPLS and libraries in general at the Federal level if properly approached and briefed. Better to offer to brief the Congressman on Hawaii public libraries now than to have the first meeting take place over some crisis or when in need of specific support. Representative Case and key staff need to understand the key role that LSTA funding plays in HSPLS finances. There may be other federal funding opportunities that may benefit HSPLS that could be identified by briefing Congressional staff of library system needs and strategic directions.

E-rate discounts. The consultants believe it is worthwhile to review the HSPLS' requests for E-rate discounts to determine the degree to which additional revenues may be generated. In comparisons to HSPLS peer library systems, HSPLS appears to be obtaining somewhat smaller awards. HSPLS obtains on average \$42,798 less than peer libraries annually based on the PLDS 2000 special survey.⁶⁵ While there is some concern about possible Federal regulations that may affect the awarding of such money in the future due to possible filtering requirements, some significant additional E-rate awards to HSPLS may be obtained.

IMLS and Other Federal Awards. The U.S. Institute for Museum and Library Services (IMLS) already provides an important source of HSPLS funding via Library Services and Technology Act (LSTA) funding⁶⁶ and funding for library services for Native Hawaiians.⁶⁷ In addition, IMLS also offers a number of competitive awards via its National Leadership Grants for Libraries for training, research and demonstration, and others.⁶⁸ In considering this option, HSPLS should concentrate on writing proposals and obtaining support for current goals and priorities. The approach is to obtain funding through these programs that support core HSPLS activities such services to the

⁶⁴ Note: some of the options were discussed by McClure during his site visit others were not presented then.

⁶⁵ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

⁶⁶ See <http://www.imls.gov/grants/library/lib_gsla.asp> for further details.

⁶⁷ See Native Hawaiian Library Services <http://www.imls.gov/grants/library/lib_nhls.asp>.

⁶⁸ See the National Leadership Grants for Libraries <http://www.imls.gov/grants/library/lib_nlgl.asp>.

disadvantaged, outreach, networked services, etc. Although awards are only for two-three years, they can be a significant boost to HSPLS services.

Other Federal Programs. Community Network Development Awards from the Housing and Urban Development Department (HUD) that support the development of community networks.⁶⁹ This and other similar programs from the National Telecommunications Information Administration, namely the Technology Opportunity Programs⁷⁰ have some potential for HSPLS to obtain funds in support of a range of community Internet and networking services. The Experience Works <<http://www.experienceworks.org/scsep.html>> (formerly Green Thumb) organization runs the Senior Community Service Employment Program (SCSEP) funded under Title V of the Older Americans Act. It provides a number of libraries across the country with paraprofessional staff funded by the program drawn from low-income, older Americans residing in primarily rural areas. HSPLS received \$118,544 less than its peer libraries on average from Federal sources in the 2000 based on the PLDS special survey.⁷¹ Broward County raised \$600,000 a year from federal sources. To be competitive for such awards, it is usually best to partner with other government agencies and the private sector. Political support from the Hawaii Congressional delegation can assist HSPLS in such program proposal submissions.

State Options

Increase State Aid. A long term strategy of HSPLS and the Hawaii library community, Friends, and Foundation is to mount an effort to increase overall aid to public libraries. For example, currently, the national average of total income per capita support to public libraries is \$28.96; the current total income per capita support to public libraries in Hawaii is \$19.10. The data provided in Phase I of this report provides a basis for making such a request a reality. Organizing a strategic long term plan with advocacy from the Friends and others in the state would also be needed.

Establish New Public Libraries. Perhaps the only sustained new state funding HSPLS has received recently has been new building funds with grudging support for the new facility's associated collections, staff and services. On the horizon, is replacements for the present school-public libraries and interest in a kiosk project. Is it possible to broaden this to other large capital projects? For example, a fund/endowment to replace information technology infrastructure (to include workstations, telecommunications, automated system, etc.). Reviewing the essential components that enabled successfully raising the new building revenue may be instructive for these future related efforts. Essential to the effort were: a generous private/corporate donation, a tangible, readily

⁶⁹ See <http://www.hud.gov/nnw/nnwfactsheet016.html>

⁷⁰ See <http://www.ntia.doc.gov/otiahome/top/grants/grants.htm> Despite being slated for elimination in the president's budget, both the Community Technology Centers Program and the Technology Opportunity Program received funding in Congress' FY2003 budget bill, which was passed last week. Both programs will get funding comparable to last year's levels, approximately \$15.5 million and \$32.5 million respectively.

⁷¹ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

understood service and need, strong local (including local legislative) support somewhere in Hawaii and a good deal of media coverage.

Regionalize HSPLS delivery of services. Other states, for example Florida,⁷² have successfully argued to have “Regional Cooperatives” or other geographically defined units either as part of or as semi-independent agencies of the state library. The notion here following the new Governor’s initiative would be to establish regional cooperatives corresponding to Hawaii counties. The creation of such units with specific responsibilities for local delivery of services, training, etc. might provide the needed opening for county-based taxation to supplement state funding. Other HSPLS reorganizations of the system may also be possible.

Link State HSPLS support by State to Specific % of State Income Tax. Commonly known as the *Ohio Model*, since 1986, the Library and Local Government Support Fund (LLGSF)⁷³ in Ohio has expanded total library funding from \$178.2 million to \$491 million (2000) by devoting 5.7 percent of the state income tax collection to the operating costs of Ohio’s 250 public library districts. This has provided stable, predictable, and equitable funding to Ohio’ libraries. In 2000, HSPLS received the equivalent of about .03% of the individual income tax revenue.⁷⁴ 5.7% of the Hawaii 2000 individual income tax revenue would have been \$60,666,069. 3.2% of the Hawaii 2000 individual income tax revenue would have been \$34,058,144, enough to match peer and national norms.⁷⁵

Promote New Tax-based Sources of Income. HSPLS may wish to consider the degree to which it wishes to promote additional state-wide taxes or fees that could be established to support public libraries. For example, the province of Ontario established a “Development Fee” for builders and developers that requires them to provide some support for local libraries when they are building new residential areas. See also impact fees under local government below. This legislative term there was some discussion of increasing sales taxes for some portion going to education. A sales tax of one-half percent in Honolulu city/county would provide \$60 million and the statewide one half percent exercise tax increase proposed during the legislative session a would net about \$180

⁷² For background see: Kleinman, Denise et al. (2000, October 1). Public library funding: The Florida model. <[http:// www.plfig.org/flmodel.html](http://www.plfig.org/flmodel.html)>.

⁷³ For background see: Kleinman, Denise et al. (2000, October 1). Public library funding: The Ohio model. <[http:// www.plfig.org/Ohiomodel.html](http://www.plfig.org/Ohiomodel.html)>. or Ohio Department of Taxation. (1999). Library and Local Government Support Fund. <[www.state.oh.us/tax/Publications/1999_Annual_Report/ Section%2016.pdf](http://www.state.oh.us/tax/Publications/1999_Annual_Report/Section%2016.pdf)>.

⁷⁴ HSPLS is currently funded from the Hawaii Department of Education’s budget.

⁷⁵ In 2000, Hawaii collected \$1,064,317,000 from individual income tax which represented 15.33% of the state’s total revenue (Corporate income tax: \$75,271,000 1.08%; General sales tax: \$1,536,276,000 22.13%). Education expenditures, the largest state cost, at \$1,853,805,000 were 28.07% of total expenditures and \$1529.53 per capita. Library expenditures from the state general fund at \$20,332,611 were 0.3% (3/10ths of a percent) of total expenditures and 1% of total education expenditures. Data are from: U.S. Census Bureau. (2002, September). State Government Finances: 2000: Hawaii. Washington, DC: U.S. Census Bureau. <<http://www.census.gov/govs/state/00st12hi.html>>. For a brief analysis see: Gima, Craig. (2002, May 31). State ranks second in per-capita budget. *Honolulu Star-Bulletin*. <<http://starbulletin.com/2002/05/31/news/story6.html>>.

million in revenues.⁷⁶ Missouri taxes any out of state entertainer who entertains in Missouri and earmarks the resulting funds for the arts including public libraries. Utah funds public education, in part, with a liquor tax. Another suggestion is to work for receiving some percentage of taxes/fees for cruises since a number of folks on cruises use public libraries. Other options may also exist.

Vanity Car Tags and/or Percentage of Tag Tax for Public Libraries. As has been already discussed by HSPLS senior managers, establish a vanity license plate that supports public libraries or allow the taxpayer to check a box indicating that they want some percentage of their car tag tax to be dedicated to public libraries.

State Income Tax Donation Check Off Box. A HSPLS check off option passed in the current legislative session to begin with the 2004 tax year. A February 9, 2003 article in the *Honolulu Advertiser* indicated that there were 575,000 state taxpayers in 2002. If everyone checked off \$2 donation, the maximum income possible would be \$1,150,000 annually. However, recent experience with a school repair check off box may make an \$115,000 annual figure more realistic.⁷⁷ An advertising campaign beginning in January 2004 would significantly increase those who check off the library donation box. At minimum, anyone who obtains tax forms from the library should also receive a flyer acquainting them with the library check off box.

Local Options

Local government in Hawaii generally mean county governments.⁷⁸ However, some of the options presented below might also apply to cities in Hawaii. Public libraries were funded locally prior to statehood. But with statehood, public libraries were assumed to be a state obligation. Peer libraries receive on average \$9 million from county and/or municipal sources annually according to the 2000 PLDS special survey.⁷⁹ Local taxation options considered include:

Establish Special Taxing Districts. “Special district libraries are the fastest-growing type of library organization, even though only 19 states have laws that permit them.... Illinois has the largest number of special district libraries, with nearly 300; but as a percent of libraries in the state, Kentucky bests the Illinois tally at 90% to Illinois' 48%. Another

⁷⁶ This is an estimate derived from a figure cited in the *Honolulu Advertiser* that a 1% sales tax increase in Honolulu city/county would provide \$120 million annually. Pang, Gordon Y.K. (2003, April 4). Senate committee OKs bills to increase sales tax. *Honolulu Advertiser* <<http://the.honoluluadvertiser.com/article/2003/Apr/04/ln/ln02a.html>>.

⁷⁷ Aguiar, Eloise. (2003, March 10). Tax option benefiting schools. *Honolulu Advertiser*, <<http://the.honoluluadvertiser.com/article/2003/Mar/10/ln/ln17a.html>>. “By checking a box on their state income tax return, filers can allocate \$2 of their taxes — \$4 for people filing joint returns — directly to school repair projects... The program, adopted by the 2002 Legislature ... expects to award the approximately \$110,000 collected last year.”

⁷⁸ The counties in Hawaii are Honolulu <<http://www.co.honolulu.hi.us/>>, Maui <<http://www.co.maui.hi.us/>>, Hawaii <<http://www.Hawaii-county.com/contents.htm>>, and Kauai <<http://www.kauaigov.org/index.html>>. A mayor and a elected council governs each county.

⁷⁹ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

state with significant numbers of special districts is Delaware with 53%. Colorado, Nevada, Michigan, Washington, Idaho, and Arizona all have more than 25% district libraries.⁸⁰ One such state is New York⁸¹ that has, by statute, allowed public libraries to establish geographic taxing districts that may cross a number of different political jurisdictions in the state. For example, a public library can be part of a school district for taxing purposes – when you vote on the school budget you also vote on the public library budget. The purpose is to allow local residents the option of taxing themselves for special programs or projects (such as library services) should they wish to do so. Six (Detroit, Indianapolis-Marion County, King County, Las Vegas, Miami, and Tampa-Hillsborough) of twenty four peer library systems investigated have some form of local taxing authority.

City or County Retail Sales Tax. Change the existing state statutes so that cities and or counties that wish to tax themselves some additional millage could do so specifically to support public libraries. Currently, there are no mechanisms in place to allow a local community – one that WANTS to tax itself to support public libraries – to do so.⁸²

Bonds. Change the existing state statutes so that cities and/or counties can establish a Bond (via voter approval) to borrow money to support new library buildings and/or services. This is a typical strategy used by many public libraries to obtain additional funding sources and then have the city or county pay off the Bond over the next X number of years.

Impact fees. A number of local governments faced with rapidly growing areas and populations and corresponding new construction (both in evidence in Hawaii) impose impact fees to pay for a variety of public services and facilities including libraries.⁸³ Development impact fees are one-time fees charged to new development that are used to defray some of the costs of providing these additional public facilities. For example, in December 2002 the Pasco County (St. Petersburg, FL) Commissioners voted “to pass an impact fee for libraries that totals \$145 per new house and \$97 per new apartment or mobile home.”⁸⁴

⁸⁰ Hennen, Thomas J. Jr. (2002, June/July). Are wider library units wiser? *American Libraries*, 33 (6) <http://www.haplr-index.com/Wider_Wiser.htm>. Provides and overview, model law, and useful bibliography.

⁸¹ For further information see: New York State Library. Division of Library Development. (2003). Public Library Districts How-To Kit. <<http://www.nysl.nysed.gov/libdev/libspldtools/index.html>>.

⁸² For purposes of discussion a 1 percent sales tax in Honolulu county would bring in about \$120 million with five percent of the sales tax revenue going to the state tax department to administer the tax if a plan similar to the one recently proposed by Honolulu County was adopted. See: Arakawa, Lynda. (2003, March 20). Legislators may let city levy sales tax. *Honolulu Advertiser*. <<http://the.honoluluadvertiser.com/article/2003/Mar/20/ln/ln44a.html>>.

⁸³ For background see: Services Center of Washington (MRSC). (2003). Impact Fees. <<http://www.mrsc.org/planning/impactpg.htm>>. Institute for Local Self Government. (2003) Impact fees and dedications. <<http://www.ilsg.org/doc.asp?intParentID=1868>>. For a sample ordinance see: Federick County, MD. (2000). Ordinance No. 00-32-274. <<http://www.co.frederick.md.us/BOCC/ImpactFeeLibrary.pdf>>

⁸⁴ Amrhein, Saundra. (2002, December 30). Commission sews up loose ends. *St. Petersburg Times*. <http://www.sptimes.com/2002/12/30/Pasco/Commission_sews_up_lo.shtml>.

Vanity Car Tags and/or Percentage of Tag Tax for Public Libraries. A variant on the state level approach outlined above. Change the existing statutes so counties can have the option of allocating part of its Tag tax to public libraries.

“About 80 percent of funding for the nation's nearly 15,000 public libraries comes from local taxes. About 20 percent comes from state funding and less than 1 percent from federal tax dollars.⁸⁵” In Hawaii for fiscal 2000, 87.6 % of public library funding came from state appropriation, 3.6% from federal funds and nothing from local governments.

The study team recommends that HSPLS conduct one or more surveys to gauge public opinion regarding possible mechanisms to reduce the annual shortfall when compared to peer or national norms prior to adopting any approach. For example, see Appendix II-7 for a draft survey instrument that asks Hawaii residents their preferences. This survey could be administered at HSPLS branches during the October count week.

Intergovernmental Transfer

This additional revenue source considers ways that local governments might regularly support their local public libraries via intergovernmental transfers e.g., a county government agreeing to provide rubbish pickup, security services, computer or telecommunications support for libraries within the county.

Corporate Giving

HSPLS may wish to consider the establishment of a sponsorship program that targets the private sector and provides them with an opportunity to have significant visibility and presence in support of the library. This would be a sizable expansion from current HSPLS efforts in this area. HSPLS received on average \$177,970 less annually than peer library systems from corporate giving. Philadelphia Free Library, the most successful of the peer libraries studied, generated \$481,858 more than HSPLS from this source in 2000.⁸⁶

Potential reasons for corporate giving might be sub-divided into the following categories:

Collection development: Interviews and prior HSPLS success, in the form of the Moon Book Club, suggest that business associations and unions might be tapped to obtain funding for library collections of use to their members (for example specialized licensed databases) or workers. See Appendix II-8 for further discussion.

Contracted service or fee for service: Corporations have contracted with public libraries in other states for services, for example literacy (including ESL) training of their workers, computer, software, and Internet training for their workers, specialized reference services, and for regular use of library facilities. The next steps for HSPLS in this area are

⁸⁵ American Library Association. (2003) Renaissance in public libraries. <<http://www.ala.org/pio/factsheets/renaissance.html>>.

⁸⁶ According to: Public Library Association. (2001).

to systematically promote existing fee based library service offerings to local firms and develop the institutional capacity to widely offer such services. There may be an opportunity to serve as a database broker for groups of related firms (e.g., small legal firms) or associations (e.g., coffee growers) with the HSPLS gaining access to expensive, specialized databases for the larger community or HSPLS could charge a brokerage fee.

Program sponsorship/endorsement: HSPLS could expand its corporate sponsorship efforts beyond acknowledging funding received in library publications and promotional materials. Is online advertising an option on electronic library services? What forms of advertising are permissible within the library? Could corporations sponsor discrete programs (summer reading, reference services, video lending, etc.) in return for an HSPLS endorsement of the corporation?

In kind donations: Some public libraries in other states pursue discounts on the costs or recurring expenditures from local corporations (e.g., telecommunications, garbage, security, information technology) with some success. These small savings, particularly if sustained, can add up over time.

Donations in the public interest: Public libraries in other states occasionally receive sustained funding of specific, tangible programs and services or to the library system for general purposes particularly if they sponsor annual events target to corporate leaders. Discussions with the Hawaii Business Council suggest that it may now be appropriate to seek such funds systematically using some type of annual event perhaps. This type of activity is best carried out by a library support organization (allowing staff to do what they do best is the usual logic). But there is nothing to prevent HSPLS itself from pursuing this type of corporate funding at need.

While some types of corporate giving are best pursued by the Hawaii Library Foundation it does not appear that in the short term the Library Foundation will be able to organize itself to develop such a program.

The consultants noted great potential for small and medium size retail business contributions to both the system and individual branches. The format is usually that for some period of time the retail establishment agrees to donate some portion of its profits to the system or a branch. Other, off beat, approaches should be considered. For example, "Treat a Librarian to Dinner," in which a donor buys a gift certificate at a local restaurant to treat a librarian out to dinner and the restaurant donates \$10 to HSPLS or a local branch. Recently one of the consultants witnessed a very successful yet deceptively simple appeal. A local newspaper ran an advertisement focusing on a specific library need and included an addressed envelope (to a fund set up to pay for the need) in every copy of the paper. At present, HSPLS does not systematically pursue these opportunities (to include an annual calendar of initiatives). It should.

Individual Contributions

HSPLS may wish to do more to actively seek individual contributions from library users and benefactors. In 2000, HSPLS received on average \$274,278 less annually than peer library systems. The Denver Public Library System, the most successful of the peer libraries studied, earned \$889,445 more than HSPLS in 2000 from this source.⁸⁷

HSPLS may need to coordinate its activities with the Foundation and Friends. However, what is essential is a systematic program understood by potential donors, library staff and others for planned giving of both small and large amounts. If the Foundation and Friends are incapable or unwilling to take on this important task, perhaps HSPLS should do it itself. Most instructive is to pose the question throughout the organization what if I potential donor wanted to give some amount, say \$1,000, to a branch or the system? How would the branch and the system respond, bearing in mind it should be simple and easy for the potential donor to donate. At present, the process and potential uses of such a donation are unclear to potential donors and library managers alike. That shouldn't be the case.

Volunteer Services

HSPLS has recently become interested in expanding efforts to make better use of volunteers.⁸⁸ This focus builds on an earlier effort in 1995-1996 when the system faced similar financially difficult times. Other library systems have found that establishing a paid volunteer coordinator position to be critical to harnessing volunteer talent and time. Indeed the position pays for itself in more efficient and effective training and use of volunteer efforts.

Special Events

HSPLS may wish to consider holding one or more special events during the year in conjunction with the Friends, Foundation, or on its own. HSPLS received on average \$175,565 less annually than peer library systems. The Philadelphia Free Library, the most successful of the peer libraries studied earned \$481,858 more than HSPLS in 2000 from this source.⁸⁹ Special events might include lecture series (perhaps held in conjunction with area hotels), literary awards and dinners, dramatic presentations, topical book (and other media) clubs, regular book appraisals. Special events have been a sporadic part of HSPLS' activities. At minimum, what is needed is (a) a regularizing of these events on an annual calendar (b) designation of staff responsibility as HSPLS event coordinator (c) active involvement of an advisory committee with the appropriate connections and resources to make the event a success. These events can help better define and improve the public's image of HSPLS. Specific attention should be given as to what that image ought to be.

⁸⁷ According to: Public Library Association. (2001).

⁸⁸ Lowell, Virginia. (2003, May 2). Volunteers in the Hawaii State Public Library System (Memo to Board of Education Public Library Committee). Highlights the contributions already made by volunteers to HSPLS.

⁸⁹ According to: Public Library Association. (2001).

HSPLS Enhanced Services

This additional revenue source considers ways that HSPLS itself might generate sustained revenue that might be used to support other areas of public library operations. For example, better management of interest on funds and foundation capital held by the library, running retail operations, charging for specialized services such as custom research, faxing, scanning, printer paper.

Possible strategies include:

Fee Based Services and Programs. HSPLS currently has statutes that allow it to charge for a range of library services and programs. Apparently, the administrative regulations implementing the statute need additional detail and flexibility for HSPLS to better use the law to charge for fees and services. The consultants recommend that HSPLS ask the Attorney General to clarify the regulations and allow greater flexibility to HSPLS in this area. In addition, HSPLS should assume control of the copy machines from the Library Foundation and gain direct control of the revenue from them.⁹⁰ Additional related fee-based services should also be strongly considered including bulk copying, fee-based faxing,⁹¹ scanning, computer printing (see below), computer and Internet training, and binding. As one library manager in another state put it: “Any product or service currently offered by shipping stores, copy shops, bookstores, video stores, publisher, Internet cafés and office supply outlets could be fair game for public libraries to offer, particularly if not available locally. But local library managers need to be willing and able and the local business community needs to be polled.”

Better Management of the Collection of Library Fines. There is some thought that local libraries are not as effective in collecting various fines as they might be. HSPLS collects \$238,100 more than peer libraries on average annually but \$383,501 less on average annually than Baltimore County public library with the highest peer fine collection rate.⁹² HSPLS may wish to review the process and procedures by which fines are collected. For example it is possible to use circulation records to determine the number of items that were checked out and returned late against the fines actually collected. A reward system

⁹⁰ For a recent survey of issues related to copy services at a mainland system see: North Suburban Library System (Wheeling, IL). (2002, May). NSLS Fast Facts #323 - Fees for Magazine Article Copies. <http://fastfacts.nsls.info/surveys/pff323sum_1.asp>. North Suburban Library System (Wheeling, IL). (2001, November 6). NSLS Fast Facts #308 - Copy Costs. <http://fastfacts.nsls.info/surveys/pff308sum_1.asp>.

⁹¹ A recent (spring 2003) change to HSPLS policy now allows the public to fax documents from library branches for a fee. HSPLS branches should be notified of the change in policy and encouraged to promote this service among their users. For a recent survey of issues at a mainland system see: North Suburban Library System (Wheeling, IL). (2002, December). NSLS Fast Facts #384 – Public Fax Machines. <http://fastfacts.nsls.info/surveys/pff384sum_1.asp>.

⁹² According to: Public Library Association. (2001).

could be established such that local libraries that do a better job of collecting fines can keep some of that money specifically for their library.⁹³

Better Management of Interest and Investment Income. HSPLS received on average \$286,193 less annually than peer library systems from management of interest and investment income giving. Miami-Dade Public Library, the most successful of the peer libraries studied, generated \$870,000 more than HSPLS from this source in 2000.⁹⁴

Charge for Interlibrary loans. California is currently actively considering charging fees for its interlibrary loans.⁹⁵

Licensing Arrangements with Food/Product Vendors. A number of public libraries have established relationships with beverage vendors, food vendors, etc. whereby the vendor places and manages vending machines at the public library and a percentage of the sales are returned to the library.⁹⁶ Data (see Table II-1 or Appendix II-4) indicate that HSPLS receives significantly less from such an approach than its peer libraries -- \$227,301 less annually on average than peer libraries in 2001. For example, Baltimore County Public Library generates \$2.5 million annually from vending activity.⁹⁷ See Appendix II-9 for further information on establishing food and beverage vending at HSPLS branch libraries.

Vending of printing, office and other supplies. The vending of office supplies⁹⁸ is not new to HSPLS and should be considered for the future.⁹⁹ A contract with a mainland supplier would apparently be needed. Charging for the use of library printers a common feature in many libraries, is under active consideration at HSPLS and should be pursued.¹⁰⁰

⁹³ The San Jose system is considering raising its late library book maximum fine from \$4 to \$10. (2003, May 19). Proposed increases. San Jose Mercury News <<http://www.bayarea.com/mld/mercurynews/news/5894221.htm>>.

⁹⁴ According to: Public Library Association. (2001).

⁹⁵ Osgood, Charles. (2003, May 15). Public libraries may be charging for its services (commentary). *Osgood File*. WCBS Radio. <http://wcb880.com/osgood/osgood_story_135133405.html>.

⁹⁶ For various issues and income calculations, in this case soda and snack vending at a university library, see: University of Oregon Library System. Library Staff Association. Ways & Means Committee. (2000, August). Report on staff lounge vending machine income. <<http://libweb.uoregon.edu/~lsa/comm-waysandmeans/vendingreport.html>>.

⁹⁷ According to: Public Library Association. (2001).

⁹⁸ For a recent survey of issues at a mainland library system see: North Suburban Library System (Wheeling, IL). (2003, January). NSLS Fast Facts #389 - School Supply Vending Machines. <http://fastfacts.nsls.info/surveys/pff389sum_1.asp>.

⁹⁹ From: Christensen, Jean. (1996, December 30). Book lender now pencil pusher. *Honolulu Star Bulletin*. <<http://starbulletin.com/96/12/30/news/story4.html>>. "The vending machine idea is a takeoff on the store operated at the main library in downtown Honolulu. There, patrons can buy basic supplies along with bookmarks, educational toys, postcards and other souvenirs... Downward said."

¹⁰⁰ For further information see: Indianapolis and Marion County. (2002, November 4). *Request for proposals for cash/coin units* (for OCS Print Vending Software and stand

Library Cafes, Stores and Sale of Library Related Products. A number of public libraries have cafes¹⁰¹ and stores on-site. Indeed HSPLS had a store at HSL at one time.¹⁰² Some sell library-related products such as mugs, T-shirts, bookmarks, etc. Peer libraries earned on average \$89,677 annually from retail outlets with the most successful peer system, Multnomah County Public Library, earning \$240,860 in 2000 from its store and also ran an espresso bar with Starbucks.¹⁰³ Peer libraries earned on average \$70,386 more than HSPLS annually from product/service sales. Baltimore County, the peer that sold the most products and services earned \$195,869 in 2000.¹⁰⁴ HSPLS may wish to consider establishing a number of such stores in the larger libraries in the system. The stores can be contracted out in such a way that the library has no day-to-day management of the stores but receives some percentage on total sales.¹⁰⁵

Virtual Library Stores. Woodland Public Library in California has begun a program worth considering called *Shop for the Library* <<http://www.shopforthelibrary.net/>>. Over

alone Microfilms and Microfiche machines). <http://www.imcpl.lib.in.us/rfp02_coincash.pdf>. Statler Associates (statler1@statlerassociates.com) <<http://www.statlerassociates.com/library.html>> uses Output Control Software from OCS, Inc., for vending computer output (e.g., printing of licensed database search results) on Novell or Windows NT networks - OCS-NT, computer output on stand alone (OCS-SA) and peer to peer (OCS-Peer to Peer) networked systems. See <<http://www.statlerassociates.com/printvending.html>>. Pharos <<http://www.pharos.com/Markets/PublicLibrary.asp>> offers vending for computer printer output. North Suburban Library System (Wheeling, IL). (2002, May). NSLS Fast Facts #323 - Fees for Magazine Article Copies. <http://fastfacts.nsls.info/surveys/pff323sum_1.asp>.

¹⁰¹ See for example: Carmel Clay Public Library. (1998, August). Coffee area request for proposals. <<http://www.carmel.lib.in.us/building/coffee/rfpcoffee.htm>>. Switzer, Jeff. (2003, April 21). Libraries launch 'Food For Thought' - Federal Way cafe set to open today. *King County Journal*. <<http://www.kingcountyjournal.com/sited/story/html/128780>>.

¹⁰² From: Christensen, Jean. (1996, December 30). Book lender now pencil pusher. *Honolulu Star Bulletin*. <<http://starbulletin.com/96/12/30/news/story4.html>>. "... the store operated at the main library in downtown Honolulu. There, patrons can buy basic supplies along with bookmarks, educational toys, postcards and other souvenirs. The store handles about \$50,000 to \$60,000 in gross sales per year, Downward said."

¹⁰³ A recent interview with the store manager indicates that the Starbuck venture has closed (only the staff used it and it didn't make money) and the store is barely breaking even. Most stores face two problems according to the manager: finding suitable products and maintaining an enthusiastic staff and governing board. The Friends (who run the store) are hoping to reinvigorate the governing board and put the store back on the path toward profitability.

¹⁰⁴ Peer comparison figures from: Public Library Association. (2001).

¹⁰⁵ For a coffee café RFP by the Carmel Clay Public Library (Indiana) see <<http://www.carmel.lib.in.us/building/coffee/coffee.htm>>.

200 merchants, including Target, Sears, Dell and Hickory Farms, have agreed to pay the library between two and fifty-five percent of all sales referred from the web site.¹⁰⁶

Contract Services. HSPLS received on average \$254,434 less annually than peer library systems from contract services. Las Vegas Public Library, the most successful of the peer libraries studied generated \$671,805 more than HSPLS from this source in 2000.¹⁰⁷

Commission. HSPLS received on average \$23,630 less annually than peer library systems from commissions. However the Dallas Public Library, the most successful of the peer libraries studied, generated \$127,679 more than HSPLS from this source in 2000.¹⁰⁸

We Can Get It for You Service. Offer, at libraries that do not have a nearby bookstore, to obtain/order copies of books/videos/CDs/DVDs/periodicals etc. at a competitive price plus a modest fee (say \$2 per hardback) for patrons who want their own copy and who are willing to pay. Note: patrons would need to be assured that regular ILL services are not going away. This idea would need to be piloted first to see what was involved and what revenue could be generated. Or as an alternative, perhaps HSPLS partners with Borders or Barnes & Noble in Honolulu to offer a similar service.

HSPLS Core or Currently Free Services

There has been some discussion of instituting fees for core or currently free HSPLS services. For example, charging for the first library card or charging a small admission fee (similar to museums and parks). In general, charging for formerly free existing services should be avoided if possible due to the ill will and negative publicity created. Some will also believe any new fee on existing free services to be “double taxation.” A secondary consideration is the presence of too many fees, “nickel and dimeing us to death.” If a formerly free service can be re-packaged in some significantly enhanced way, a fee might be possible. However, nothing presently presents itself for consideration in this area.

Operating and Other Grants

The State Librarian has eloquently expressed her reluctance to seek one time grant funding that cannot be sustained. On the other hand, one time funding may become attractive in tough economic times as a bridge to a better finance era. In addition, external funding is available to fund operating expenses and might be considered.¹⁰⁹

¹⁰⁶ Theobald, Dan. (2003, May). Facing tough times, a rural public library looks to on-line commerce. California State Library Connection 30 p. 3. <http://www.library.ca.gov/newsletter/2003/CSL_Connection_May03.pdf>. Contact Marie Bryan, Library Director <mebryan@dcn.davis.ca.us> Phone: (530) 661-4157.

¹⁰⁷ According to: Public Library Association. (2001).

¹⁰⁸ According to: Public Library Association. (2001).

¹⁰⁹ See for example, (2001). *Operating grants for nonprofit organizations*. Phoenix, AZ: Oryz. Identifies over 1000 current grants and funding opportunities to support general operating expenses --organized by state--each with contact and requirement information.

PHASE II REPORT RECOMMENDATIONS

Draft recommendations so far:

Need for Additional Sources of Revenue Plan

Simply choosing from the menu of additional revenue sources presented here and pursuing implementation as time and opportunity permit will not effectively reduce or end the shortfall in annual revenue or create additional opportunities for new revenue. Instead, the data and strategies presented here should be used as the basis for developing an additional revenue plan that addresses:

- The need for a prioritized list of additional revenue sources to pursue based on an assessment of feasibility, time frame, and likely size of revenue to be gained.
- A step-by-step action plan for the priority revenue sources detailing how to pursue obtaining revenue from each source. Included for each source should be roles, responsibilities, strategies and tactics, likely issues and how to address them, and a timetable. The individual action plans should then be combined into a master plan and timetable for obtaining revenue from the priority sources.
- A plan for the use of each priority revenue source that can be incorporated into the marketing effort to obtain access to the revenue source. For example, if a local library generates revenue from an entrepreneurial activity, who spends the revenue for what purpose? If a county government contributes revenue or in kind support to the public libraries in the county, what is the tangible benefit to county government and citizens?
- A master finance plan that considers how to best allocate revenue for all sources for maximum efficiency and effectiveness. For example, if financing from county governments become a reality how will HSPLS address unequal funding by one or more counties?
- Are changes in governance needed due to changes in source of revenue? If so how should they be addressed? The most obvious case would be if local governments contributed significantly to HPLS. But even large sustained corporate giving might well demand a business advisory council to provide input to the State Librarian on revenue spending.
- A detailed strategy for organizing and obtaining support from Hawaii residents, library users, the Friends, the Foundation, and others to advocate for the strategies suggested and to educate the state on the need and importance of these strategies.

Consideration of what new revenue sources to seek, how to direct the revenue obtained, how to use new revenue as incentive or others to contribute, how to coordinate new revenue with older sources to achieve system priorities, and new governance mechanisms need attention in advance of action in this area.

Foundation & Friends

The report provides a menu of possible additional sustainable funding options related to the Foundation, Friends and state and local taxation options. No attempt has been made here to assess the relative strengths, weaknesses or feasibility of the options. HSPLS staff will want to review these options and strategies and given local knowledge, determine which options have the greatest potential over the long term to provide additional sustainable funding. HSPLS will have to (1) develop a carefully thought-out strategic plan to develop the options selected, and (2) marshal support from government officials, residents, Friends, and the Library Foundation regardless of the options selected.

In the best of all worlds, both the Friends and the Foundation would be significant contributors to HSPLS' goal of obtaining additional sustainable sources of funding. The Friends do provide such support but they need to move into a range of other activities to promote advocacy and education and to insure that their awards have significant impact. If the libraries receiving such awards are unable or unwilling to demonstrate this impact, the Friends will need to consider new guidelines for program awards. The Foundation cannot, in its current condition, provide meaningful support to HSPLS.

It is clear that there are also serious issues of communication among the Friends, Foundation, and the HSPLS. Both the Friends and the Foundation need to better differentiate themselves in terms of their goals and activities so as to not confuse the general public or to insure that they are not competing with each other for the same scarce resources. The three groups need to establish a memorandum of understanding as to which organization does what, who is being targeted for fundraising, and how they successfully interact and are coordinated.

The burden for development and change is on the Foundation. Over the next 12-18 months the Foundation must significantly reinvent itself and clarify its purpose and focus. The consultant recommended to the Foundation that this should be their primary objective during the next 12-18 months. During this time period they should hold only one-two major high-end fundraising events, but concentrate on reinvention and reorganization. If the Foundation is unable to successfully reinvent and reorganize itself in this time period, HSPLS may wish to reconsider its relationship with the Foundation.

NEXT STEPS

(To be completed)

APPENDICES
PHASE I REPORT: APPENDICES

Appendix I-1 Project Advisory Committee Members

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Information/Computer Lab Manager at Hawaii Pacific University. This is our "outside" member. She used to be the Branch Manager for us at Manoa Public Library. Previously, she was a librarian at Hawaii Pacific University where she has now returned.

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Manager of the Hawaii State Library. Member of the State Librarian's Administrative Team. Former Section Head of the Business, Science and Technology section of the Hawaii State Library.

Appendix I-2 Potential Library Services for Inclusion in Market Value Study			
Service	Description	Commercial equivalent	Recommendation
ADMISSIONS VALUE			
Admissions	An annual count of the number of walk in patrons who visited HSPLS libraries.	Median museum admission fee 1999 was \$3.75 according to the American Association of Museums. Morey and Associates reports average adult admission fees of \$6.30, children's \$3.70 for an average of \$5.00 in 2000. In 2000, adult: \$6.60 children: \$4.10 average: \$5.35.	Use \$3.75 in 2000.
Remote Internet access	Annual count of number of library users who visited the HSPLS libraries (web site, catalog, and licensed databases.) via the Internet.	Use one half the museum rate in recognition that online services may not be the equivalent to those that can be obtained by walk in patrons at present.	Use data not available 2000, 2002. This will be come an increasingly important use and value should be counted.
Phone-in patrons	Patrons who phone in for a variety of purposes including telephone reference assistance, book renewal, directions, hours, etc.	Verizon in Hawaii charges \$.20 per directory assistance (411) can for information within the region, \$.95 for out of state information. The 2000-2001 <i>Annual summary</i> indicates 483,000 phone-in patrons with a market value of \$96,600 at the \$.20 rate.	Not used in 2000. The value was not large and overall market value already high. This value is partially counted elsewhere.
MATERIALS USE			
Circulation	Includes annual count of all materials (adult and juvenile) circulated via the automated system, including books, interlibrary loan transactions, and rental of videos, CDs, DVDs and other media.	<i>School Library Journal</i> assigns a 2000 average juvenile hardback book a price of \$17.57 (<i>Bowker Annual</i> assigns a value of \$22.71). <i>Bowker Annual</i> assigns all adult non-fiction hardback book priced is under \$81 an average price of \$36.20. If all adult non-fiction books regardless of price were considered the average would be \$60.84. An average Hawaii Blockbuster rental was \$4.00 11/02. The 2000 circulation data were not broken down by material type so the 2002 percentages were used (juvenile & young adult: 41%; adult & reference: 57% media: 2%)	Use present values for 2000, 2002. Recommend in future that circulation be broken down into adult books, juvenile books, media (and other) rentals to better correspond to commercial equivalents.
Reserves/holds /best sellers	Materials, particularly best sellers, are reserved or held for users.	Similar services are commercially offered for free. One could treat as a separate category of materials use and calculate the average book price at a higher best seller rate.	Do not treat in a special manner in 2000. Discuss for 2002 and future.
In-library materials use	Derived from a one week sample of items used in-house, includes: adult & juvenile books, reference, media, newspaper & periodical use, etc.	Used one half the market rate for circulating materials reflecting the possible less intensive use of in house materials and the use of less costly newspapers and periodicals.	Use at ½ circulation rates in 2000, 2002.

Appendix I-2 Potential Library Services for Inclusion in a Market Value Study with HSPLS Recommendations (Continued)			
Service	Description	Commercial equivalent	Recommendation
MATERIALS USE (Continued)			
Licensed database use	Annual counts supplied by vendors and also based on local sample of downloads, e-mails, prints, and views of full text documents	Many licensed database providers offer to obtain the full text of documents found. The average rate is \$8-\$10 per article. Need to coordinate pricing with that chosen for (remote) searches to avoid double billing.	Service started in 2002. Recommend obtaining total and branch data for all services for searches, hits, abstracts, emails, full text articles viewed, pdf articles viewed. Sample # prints and add totals.
Books by mail	Books are mailed to library users at home (or work).	Did not obtain data. Use appears to be low. Amount appears to be counted in circulation statistics.	Include in 2002 at a higher rate if data can be broken out, is large amount, and a commercial value found.
REFERENCE SERVICE			
Reference service	<p>The value is computed by multiplying the total annual hours of service by an hourly rate for information brokers.</p> <p>The total annual hours of service equals the number of hours HSPLS branches are open.</p>	Information Management Systems, a Honolulu information broker, charges \$50 per hour for business. This was the only Hawaii information broker found. HSPLS offers custom research service at cost of \$60 per hour. Could not find any national figure based on per question answered. The annual number of hours that reference service is offered was unexpectedly difficult to obtain. The annual number of hours that the branches were open (with each unit at HSL counted separately) seemed a reasonable alternative. The hours of operation were close to but lower than the estimate of 2002 reference hours obtained.	Use \$50 per hour and annual hours of operation totals for 2000, 2002. Consider using a per question answered total based on 2000 and 2002 average in the future. Otherwise, continue to use an hourly rate (either in Hawaii or nationally).

Appendix I-2 Potential Library Services for Inclusion in a Market Value Study with HSPLS Recommendations			
Service	Description	Commercial equivalent	Recommendation
REFERENCE SERVICE (Continued)			
Licensed database searches	The number of searches of licensed databases using data supplied by the vendor or obtained by sampling	Perhaps calculate at one half the per reference transaction average found for above. So if the average reference transaction is \$6.13 (2000 data) and there were 49,872 searches (EBSCO 2002 partial data), the market value would be: \$305,715. Note, does not include other licensed databases. Need to coordinate pricing with materials use.	Service not available in 2000, include in 2002, Need to find way to count other database usage.
Mediated searches	Searches of databases conducted by librarians rather than library users.	Could use information broker rate. This service is included in the reference totals but not broken out.	Do not include separately.
INTERNET USE			
Workstation use	Public access workstation use based on log sheet.	Kinko's rate is \$12. Each use is billed as if an hour was used.	Use service in 2000, 2002 and future.

Appendix I-2 Potential Library Services for Inclusion in a Market Value Study with HSPLS Recommendations (Continued)			
Service	Description	Commercial equivalent	Recommendation
LIBRARY PROGRAMS			
Instructional	Instructional programs include infant and pre-school story hours, class visits, bibliographic instruction, after school homework help, literacy, college career fairs, computer and Internet training, summer reading programs, tax preparation, displays, etc.	The intent was to separate programs into instructional and entertainment valuing higher the instructional. Entertainment was to be counted as the average matinee movie rate (\$5) in Hawaii. Each instructional program was to be considered an hour in length and valued at the hourly rate of a beginning public school teacher with a master'd degree (\$23). Summer reading programs were to be valued at a rate equivalent to the average of similar programs offered by public and private schools. This proved difficult for 2000 and 2002 and all programs were valued at the average matinee movie rate (\$5). Difficulties included: no system-wide breakdown of instructional and educational programs; branch program and attendance totals disagreeing with system totals and actual individual program counts. A further difficulty was that instructional programs were undervalued by the originally selected method.	Count all programs at the average matinee movie rate (\$5) for 2000 and discuss further for 2002 and future. Recommend separate data be kept for recurring or high interest library programs (including those identified in description at left) and those with higher than normal market value (Internet training, tax preparation, etc.).
Entertainment	Includes various educational, cultural and fun programs offered by or in the libraries		

Appendix I-2 Potential Library Services for Inclusion in a Market Value Study with HSPLS Recommendations			
Service	Description	Commercial equivalent	Recommendation
LIBRARY PROGRAMS (Continued)			
Literacy	Literacy instruction sponsored by or offered in the libraries	Could not find HSPLS data on this activity. There are various studies that identify market value as well as indirect benefit values in this area. For example, St. Louis Public Library values a year of such efforts as follows: 618 literacy and ESL tutor provided 43,554 hours to 839 learners at \$25/hr. for a value of \$1,088,850.	Recommend any literacy activities be isolated and counted. Recommend active effort to promote occurrence of literacy activities in the library due to their perceived public value. Could be added under the program category.
Meeting rooms	Some branches offer meeting space to community groups for a fee.	Have incomplete data, specifically need number of meetings (and length of meeting, perhaps – could be averaged).	Count and include in library programs attendance totals. Select commercial equivalent from recent HSPLS survey. ¹¹⁰
OTHER SERVICES			
Copy Services	Copy machines are available at the libraries.	Hawaii Library Foundation runs this service at present, not HSPLS, HLF charges higher than commercial rates.	Do not include.
Fax services	# library faxes sent and received for the public. In 2000, this enhanced service was implemented as a branch option rather than system-wide.	Could use Kinko's rate.	Recommend including in future market value studies when pending administrative change is adopted.
Library produced materials	Most common are library pathfinders, bibliographies and guides to the collection.	Could not obtain an estimate of the number of these items produced annually.	These materials could be produced centrally (LDSS) and a count kept. Consider for the future if a count of # items produced can be obtained.
Brochure & form distribution	Includes libraries' distribution of community and government agency brochures and forms.	Hawaii State Department of Taxation was asked for cost data for its tax forms, but data could not be obtained.	An important, undervalued, service. Including a conservative estimate might be worth future consideration.

¹¹⁰ Olson, Christel. (2003, March). *Meeting room committee report*. Honolulu: HSPLS.

Appendix I-2 Potential Library Services for Inclusion in a Market Value Study with HSPLS Recommendations			
Service	Description	Commercial equivalent	Recommendation
OTHER SERVICES (Continued)			
Passport service	Some HSPLS libraries offer passport services for a fee.	Not a commercial service. Fees are the same whether at the library or elsewhere. System-wide total appears to be small. Did not obtain data.	Do not include.
HSPLS catalog use	Use of library catalog within library and remotely.	Most commercial services include this service for free. Could not find a commercial equivalent.	Do not include.
Specialized services to the handicapped	Include transcription of books into Braille or audio, specialized workstations, etc.	These services are extremely costly, highly valued, but may not be offered in enough volume to justify inclusion. Data on the type, production and use of these services were not available.	Use these valued services to illustrate that not all important services are included.
Fines	Includes fines charged for all materials	Library fines could be counted as Blockbuster charges for fines for late returns. Only data available was total amounts collected not total number of items late or media type of items late.	Do not include. Fine charges are probably an item best not publicly highlighted.
Computer technical support	ESSS offers limited technical support to the public and other organizations.	The amount of service to the public was not large enough (500 per year in 2002) at present to include but could be if the service was expanded.	Include in the future if service is expanded.

Appendix I-3 HSPLS Branch Activities Data for 2000									
HSPLS Branch	Admissions	Materials Use	In house use	# of Programs	Program Attendance	Internet Use	# Reference Questions	Hours Open per Week	Hours Open per Year
Aiea	117,676	233,984	77,116	87	3,941	2,444	36,608	40	2080
Aina Haina	100,828	144,694	76,648	137	3,809	0	13,156	42	2184
Bond	23,036	35,144	56,732	54	726	884	3,432	36	1872
Ewa Beach	294,840	128,974	102,544	93	3,100	0	33,852	43	2236
Hana	33,540	18,184	9,464	58	705	1,352	10,504	39	2028
Hanapepe	67,808	73,597	57,252	162	3,244	3,380	22,204	40	2080
Hawaii Kai	116,376	191,147	52,208	153	5,517	1,456	13,676	42	2184
Hilo	313,144	380,904	176,904	189	4,337	5,356	17,264	49	2548
Holualoa	6,760	12,109	5,980	12	691	416	208	12	624
Honokaa	23,712	26,601	38,584	85	2,020	1,404	2,288	38	1976
HSL	525,876	632,094	767,208	623	23,618	12,064	227,552	0 ¹¹¹	0
HSL- H & P	0	0	0	0	0	0		53	2756
HSL-AMR	0	0	0	0	0	0		53	2756
HSL-BST	0	0	0	0	0	0		53	2756
HSL-CIRC	0	0	0	0	0	0		53	2756
HSL-EAR	0	0	0	0	0	0		53	2756
HSL-FED DOCS	0	0	0	0	0	0		53	2756
HSL-LLH	0	0	0	0	0	0		53	2756
HSL-SERIALS	0	0	0	0	0	0		53	2756
HSL-SSP	0	0	0	0	0	0		53	2756
HSL-YA	0	0	0	0	0	0		53	2756
HSL-TRIN	0	0	0	0	0	0		53	2756
Kahuku	174,876	59,193	15,184	45	2,011	1,560	832	42	2184
Kahului	165,100	236,267	182,988	220	6,123	2,964	12,064	48	2496
Kailua	236,080	197,249	113,152	87	3,216	4,628	27,092	42	2184
Kailua-Kona	118,352	164,895	81,276	202	2,679	2,080	21,372	38	1976
Kaimuki	277,940	323,958	218,556	214	4,931	7,280	39,208	49	2548
Kalihi	108,316	122,386	35,516	786	21,520	2,028	16,692	48	2496
Kaneohe	203,476	275,319	136,188	201	5,212	6,500	46,956	49	2548
Kapaa	54,340	98,724	36,452	19	673	1,976	18,408	40	2080
Keaau	54,288	39,020	48,308	1,442	9,749	1,352	7,956	36	1872
Kealahou	28,132	52,898	15,392	16	298	1,560	3,536	37.5	1950
Kihei	58,760	106,671	73,892	56	2,185	0	9,932	38	1976
Koloa	75,972	101,088	59,384	40	502	2,132	18,304	42	2184
Lahaina	71,656	39,091	49,920	66	569	2,340	34,268	36	1872
Lanai	84,188	48,395	66,716	106	2,225	1,768	1,144	36	1872
Laupahoehoe	67,132	25,650	21,372	41	872	1,456	4,888	39	2028
LBPH	9,932	6,222	572	22	330	1,768	9,256	42	2184
Lihue	137,332	127,075	71,968	85	3,411	2,132	27,820	47	2444
Liliha	236,704	227,423	188,656	44	2,601	2,028	24,544	42	2184
Makawao	81,276	110,384	17,264	0	3,784	2,392	12,220	38.5	2002
Manoa	159,484	187,574	46,488	98	2,392	2,912	11,336	48	2496
McCully	239,200	253,390	216,788	145	5,818	2,496	38,116	48	2496
Mililani	222,248	329,959	119,652	177	8,475	1,768	22,672	48	2496
Molokai	154,388	49,620	45,864	91	4,039	2,704	19,240	36	1872
Mt. View	53,924	52,519	42,484	898	20,437	780	7,852	36	1872
Naalehu	11,752	28,086	11,232	27	318	1,768	1,716	25	1300
Pahala	45,864	20,602	16,172	64	1,371	3,068	728	39.5	2054
Pahoa	118,976	108,850	32,552	595	15,812	1,924	26,416	38	1976
Parker	183,716	125,668	54,288	1,436	36,838	1,144	7,332	34	1768

¹¹¹ The hours that the branches are opened are used to compute the number of hours of reference service provided. HSPLS treats each unit of HSL as a separate branch. So each unit's hours were counted separately to obtain a more realistic assessment of the total hours of reference service provide by HSPLS.

HSPLS Branch	Admissions	Materials Use	In house use	# of Programs	Program Attendance	Internet Use	# Ref. Ques.	Hours Open per Week	Hours Open per Year
Pearl City	258,856	329,038	232,908	113	5,077	5,928	33,852	52	2704
Princeville	68,640	74,230	48,464	24	470	2,236	11,492	40	2080
Salt Lake	136,188	256,680	66,508	275	10,287	1,612	19,240	42	2184
Wahiawa	98,436	75,928	152,100	55	1,248	2,080	34,112	38	1976
Waialua	22,724	65,232	13,780	85	1,600	1,820	10,400	40	2080
Waianae	69,992	104,814	35,724	127	3,625	832	17,680	45	2340
Waikiki	126,828	120,975	85,540	85	3,091	2,392	24,648	44	2288
Wailuku	63,336	79,493	90,428	219	4,229	2,028	35,880	39	2028
Waimanalo	112,996	49,764	33,748	158	5,636	2,704	27,560	43	2236
Waimea	25,168	29,645	29,120	30	1,190	1,248	3,016	39	2028
Waipahu	124,748	178,550	106,132	158	5,636	1,872	10,816	39	2028
Totals	6,164,912	6,759,957	4,333,368	10,205	262,188	120,016	1,081,340		133,510

¹¹² Data used in the market value study with the exception of library hours of operation come from HSPLS. (2001, December). *Annual summary for fiscal year 2000-2001*. Honolulu: HSPLS. Individual branch reports were tallied (as the summary table and branch totals did not agree). Library hours were tallied from a schedule of HSPLS hours.

Appendix I-4 Calculating HSPLS Library Services Market Value Issues

This section discusses various issues that arose when calculating the market values for each of the six heavily sued library services chosen, the return on investment and the average annual Hawaii family savings.

Admissions (Walk In Patrons)

The admissions figure assumes that each physical visit to HSPLS is equivalent to a museum admission with associated fee. The count is based on two separate sample weeks of counting annually. In the future, remote visits via the Internet to the library may be treated in a similar fashion. For example, those who visit the libraries' web page or catalog or use the HSPLS licensed databases from their home or office would be counted as having visited the library in some analogous way to a physical library visit.

The market equivalent chosen was the average national admission fee charged by museums. A Morey and Associates survey¹¹³ reported average adult admission fees of \$6.30, children's \$3.70 for an average of \$5.00 in 2000. In 2000, adult: \$6.60 children: \$4.10 average: \$5.35. The \$3.75 figure chosen was provided by a survey done by the American Museums Association.¹¹⁴ The survey reported a range of rates between \$3.75-\$6.00 with the low value being selected by the consultant. A quick check of Hawaii museums generally found the chosen rate to be conservative and below the norm.¹¹⁵

Materials Use

HSPLS reports one circulation figure and does not break down the data by adult, juvenile, or media type (CDs, DVDs, audio cassettes). This will change with the new automated system (Horizon Sunrise) and the 2002 reporting period. The intent was to assign separate commercial equivalents to adult and juvenile book loans and media rentals. An estimate was made in the absence of 2000 data. The breakdown of 2002 data was used assuming that the 2000 data followed a similar pattern of circulation. Each category was assigned an appropriate rate. Book rates were assigned using 2000 data from the standard *Bowker Annual*¹¹⁶ and an annual *School Library Journal* survey.¹¹⁷ The consultant chose the conservative adult book rate of \$36.20 from the *Bowker Annual*

¹¹³ Morey and Associates. (2001). *Cultural attraction attendance report –Museums*. Chicago: Morey and Associates <<http://www.moreyandassociates.com/reportstrends/mAR01.pdf>>.

¹¹⁴ American Museums Association (AMA) <<http://www.aam-us.org/>>. (1999). *Museum financial information survey*. Washington DC: AMA.

¹¹⁵ For example, as of January 2003, Bishop \$14.95 adults, \$11.97 youth; Contemporary \$5; Honolulu Academy of the Arts \$7.

¹¹⁶ Information Today, Inc. (2002). *Bowker annual library and book trade almanac* (47th ed). Medford, NJ: Information Today, Inc. In particular, pps. 528, 530, 536-539 were used.

¹¹⁷ Olson, Renee. (2000, March 1). Average book prices '00: Replacing the man on the moon. *School Library Journal*.

<<http://slj.reviewsnews.com/index.asp?layout=article&articleid=CA83277&publication=slj>>

table of hardback books less than \$81. The rate for all adult hardback books was \$60.84. A higher rate should be assigned for hot pick best sellers in the future when the new automated system can break out this use.

The Blockbuster rate on the different islands was averaged to establish the media rental rate of \$4.00 per item. Table Appendix I-4a summarizes how the consultants assessed materials use and costs.

Material Type	2002 Annual Materials Use ¹¹⁸	Materials Use (2002 % of total)	2000 Annual Materials Use Estimate	Materials Use Market Rate	Annual Materials Use Value
Juvenile & Young Adult Materials	2,576,591	41%	2,771,582	\$17.57	\$48,696,702
Adult Materials	3,582,090	57%	3,853,175	\$36.20	\$139,484,953
Media Rental ¹¹⁹	125,687	2%	135,199	\$4.00	\$540,797
Totals	6,284,368	100%	6,759,957		\$188,722,452

Table I-4b summarizes the calculations to determine an average materials use rate of \$27.92 used in an alternate calculation of the average savings to a Hawaii family discussed below. An average in-house materials use rate was assigned one-half the value of the average materials use rate or \$13.96.

Material Type	Materials Use Market Rate	Materials Use (2002 % of total)	Average Materials Use Market Rate
Juvenile & Young Adult Materials	\$17.57	41%	\$7.20
Adult Materials	\$36.20	57%	\$20.63
Media Rental	\$4.00	2%	\$0.08
Totals		100%	\$27.92

Materials Use within the Library

This is an estimate of the number of materials used by library patrons while they are in the libraries. Materials can include adult & juvenile books, reference, media, newspaper & periodical use, etc. The count is derived from one week sample twice a year survey of in library materials use. The year 2000 count does not offer a breakdown by the type of materials used. The consultant decided to count in library use at one-half the rates for circulating materials and assumed their use as similar to the 2002 circulation rates. This is summarized in Table Appendix I-4c.

¹¹⁸ Note: Data are incomplete as 2002 data were not available when data were compiled.

¹¹⁹ Can include microform, CDs, DVDs, video and audio tapes, etc.

Material Type	Annual In House Use	Materials Use (2002 % of total)	In House Market Rate	Annual In House Use Value
Juvenile & Young Adult Materials	1,776,681	41%	\$8.79	\$15,608,142
Adult & Reference Materials	2,470,020	57%	\$18.10	\$44,707,358
Media	86,667	2%	\$2.00	\$173,337
	4,333,368	100%	\$9.63	\$60,488,834

Reference Service

The traditional way of counting reference service is by a count of the number of reference questions asked by library users. This presented a difficulty when finding a commercial equivalent. The consultant could not find any research suggesting a national commercial rate based on a per question asked/answered. The San Diego Public Library (2001) and Miami-Dade Public Library (1998-1999) in their annual reports used a figure of \$2 per question without attributing a source or rationale. Emerging, commercial, virtual reference services, for example Google, will often let the persons asking or answering the question set an individual rate based on the difficulty of the question asked.

The best commercial analog to the libraries' reference service was information brokers hourly rates. Information Management Systems,¹²⁰ a Honolulu information broker, charges \$50 per hour for business and \$35 per hour for academic work. This was the only Hawaii information broker found. HSPLS offers custom research service at cost of \$60 per hour. So, the \$50 rate seemed reasonable.

Determining the annual number of hours of reference service provided by HSPLS libraries proved unexpectedly difficult. All libraries answer reference questions with varying degrees of formality. Some library branches do not have a reference desk or designated reference staff or hours. Instead, reference service is offered during all of the hours the libraries are open. Branch managers attempted an estimate of their hours of reference service. Later, the consultant decided a better approach was to use an annual count based on the sum of the hours each branch was open to the public. Both of these alternative approaches yielded similar estimates. Still later, it was noted that NCES collects a data element from public libraries called: # public service hours per year. Summarizing, the three alternatives considered were:

¹²⁰ Information Management Systems <<http://www.lava.net/ims/Prices.html>> P.O. Box 90481 Honolulu, Hawaii 96835-0481 Phone (808) 735 6905 Fax: (808) 737 8729

Use NCES collected data element: # public service hours per year.¹²¹

Use the annual sum of the hours open to the public for the HSPLS libraries. The logic being that when open the service is offered.

Use a 2002 estimate compiled by branch managers of the hours their libraries provided reference service as if it was the same for 2000.

Table Appendix I-4d calculates the estimated value of these alternatives. The consultant chose to use the annual number of hours open option.

Alternative	Reference Service Hours	Hourly Rate	Market Value	2000 Annual #Reference Questions	Reference per Transaction Value
# public service hours per year ¹²²	100,200	\$50.00	\$5,010,000	1,081,340	\$4.63
Annual # hours open ¹²³	133,510	\$50.00	\$6,675,500	1,081,340	\$6.17
Annual 2002 estimate of reference hours of service ¹²⁴	137,004	\$50.00	\$6,850,200	1,081,340	\$6.33

Internet Workstation Use

This is a count of the number of Internet workstation sessions based on a log sign up sheet used at each branch. The commercial equivalent used was the hourly computer rental fee charged by Kinkos of \$12.¹²⁵

Library Programs

The intent was to break down library programs into two broad classes, programs that were instructional and programs that were entertainment. Each program type's worth was to be calculated differently. Instructional programs were to be calculated on an hourly basis using the hourly rate of a beginning public school teacher with a masters degree (approximately \$23/hr). Entertainment programs were to be valued by program attendance at a commercial rate analog of the average cost of a movie ticket (\$5).¹²⁶ Summer reading programs were to be treated separately based on the average costs of equivalent summer programs offered by public and private schools.

¹²¹ The consultant was uncertain how this number was collected by HSPLS or whether the data corresponded to HSPLS fiscal year 2000-2001.

¹²² Source: NCES. (2002, July). *Public library locator: Fiscal 2000*. Washington, DC: NCES

¹²³ Compiled using the published schedule of hours open for 2000.

¹²⁴ As part of this study branch managers were asked to estimate the number of hours their branches provided reference service.

¹²⁵ Kinkos. (2002). *Price list*. Honolulu: Kinkos.

¹²⁶ This price is based on an informal survey conducted by the study advisory committee of Hawaii based movie chains in November 2002 (prices recently raised, May 2003). This result was supported by the Motion Picture Association of America. (2001). *U.S. economic review: Box office. Average annual admission price* who found the average price for 2000 was \$5.39. This is the average price paid for all admissions to movie theaters inclusive of first run, subsequent runs, senior citizens, children, and all special pricing.

The efforts at classifying library programming were thwarted conflicting data and by the lack of a breakdown of library programs into education and entertainment categories. Library program data from branch reports within the *Annual Summary*,¹²⁷ from data supplied by the HSL children's and YA librarians and from data from the public relations coordinator, did not match. None of these sources grouped the data into education or entertainment categories. In addition, valuing educational programs based on hourly teaching rates consistently undervalued their worth, particularly their worth when compared with entertainment programs. Table Appendix I-4e offers a summary of the various approaches considered.

Approach	# Programs	Educational Value (@\$23/hr/program)	Attendance	Entertainment Value (@ \$5 per attendee)
<i>Annual Summary</i> Summary Table	9582	\$220,386	235,570	\$1,177,850
<i>Annual Summary</i> Branch Reports	10,205	\$234,715	262,188	\$1,310,940
Various program summaries	8288	\$190,624	263927	\$1,319,635

The consultant decided to use the branch managers library program attendance totals for all programs (be they instructional or entertainment) as reported by the branches in the *Annual summary for fiscal 2000-2001* at the average cost of a movie ticket rate.

Return on Investment

Calculate the return on investment by dividing the total market value of the six library services chosen (\$282 million) by the amount of state and federal tax dollars received annually by HSPLS.

Showing HSPLS Value to Individuals & Families

Table I-4f summarizes the method used to calculate the value for HSPLS savings to individuals and families based on the market value of its six most heavily used services.

Value Description	Value	Comment
Total Market Value	\$281,756,337.45	
Hawaii Population	1,193,001	
HSPLS Fed & State Tax Income	\$21,158,335	
Market Value Per Capita	\$236.17	Divide Total Market Value by Population
HSPLS Federal & State Tax Income per Capita	\$17.74	Divide HSPLS Federal & State Tax Income per capita by Population
HSPLS Savings per Individual	\$218.44	Subtract Market Value Per Capita from HSPLS Federal & State Tax Income per Capita
Average Hawaii Family Size	3.42	

¹²⁷ HSPLS. (2001, December). *Annual summary for fiscal year 2000-2001*. Honolulu: HSPLS.

Market Value Per Family	\$807.72	Multiply Market Value per capita by Average Hawaii Family Size
HSPLS Federal & State Tax Income per Family	\$60.66	Multiply HSPLS Federal & State Tax Income per Capita by Average Hawaii Family Size
HSPLS Savings per Family	\$747.06	Subtract Market Value Per Family from HSPLS Federal & State Tax Income per Family

Determining HSPLS savings for Hawaii families can be calculated in several alternative ways:

Average of All Families in Hawaii: Calculates based on families in the entire population of Hawaii.

Average of Households in Hawaii: Calculates based on the number of households in Hawaii.

Average of Registered borrower families: Calculates the average number of families among registered borrowers only (not the entire population) and then figures how much an average registered borrower family might save.

The Average of All Families approach is another way to arrive at the chosen approach outlined above. Facts used to make the calculations are summarized in Table Appendix I-4g. Usage and rates are summarized in Table Appendix I-4h. The various approaches are summarized in Table Appendix I-4i.

Appendix I-4g Facts Used to Calculate Alternate HSPLS Family Savings	
Item	Statistic
Hawaii Population ¹²⁸	1,193,001
Average Family Size ¹²⁹	3.42
HSPLS Tax Support ¹³⁰	\$22,789,160
Tax per capita ¹³¹	\$17.74
# Households in Hawaii ¹³²	403,240
# Registered Borrowers ¹³³	720,748

Appendix I-4h HSPLS Activity Usage & Rates 2000		
Selected Library Activity	Usage	Rate

¹²⁸ U.S. Census. (2002). *State and county quickfacts: Hawaii*. Washington DC: U.S. Census. <<http://quickfacts.census.gov/qfd/>> states the populations as: 1,211,537. However the National Center for Educational Statistics (NCES). (2002). *Public library locator: Fiscal 2000*. Washington, DC: NCES. <<http://nces.ed.gov/surveys/libraries/liblocator/library.asp>> uses the above 1,193,001 figure. Much of this report uses NCES data so we have used their lower population figure throughout.

¹²⁹ U.S. Census. (2002). *State and county quickfacts: Hawaii*. Washington DC: U.S. Census. <<http://quickfacts.census.gov/qfd/>>.

¹³⁰ This is the figure cited by NCES however it appears to include income generated by HSPLS (including \$875,431 fines income, \$556,227 other enhanced services income) rather than received through state government. A better figure would be to use just the state tax monies (or state plus federal funding: \$894,844). However to be consistent, the NCES *Public Library Locator* income number will be used throughout.

¹³¹ Calculation: Federal & State Tax support divided by population served.

¹³² U.S. Census. (2002). *State and county quickfacts: Hawaii*. Washington DC: U.S. Census. <<http://quickfacts.census.gov/qfd/>>.

¹³³ Data supplied by Vernon Tam using the HSPLS automated system.

Admissions (Walk in Patrons)	6,164,912	\$3.75
Materials Use	6,759,957	\$27.92 ¹³⁴
In Library Material Use	4,333,368	\$13.96 ⁹⁵
Reference Service	1,081,340	\$6.17
Internet Workstation Use Hours	120,016	\$12.00
Library Programs	262,188	\$5.00

Appendix I-4i Summary of Approaches Used to Calculate HSPLS Family Value								
	Average Household		Average of All Families			Registered Borrower Family		
	Use per household	Household Market Value	Use per Capita	Use per Family	Market Value	Use per Registered Borrower	Use per Registered Borrower Family	Market Value
Admissions	15.29	\$57.33	5.17	\$17.67	\$66.27	8.55	29.25	\$109.70
Materials Use	16.76	\$468.02	5.67	\$19.38	\$373.17	9.38	32.08	\$895.50
In House Materials Use	10.75	\$150.01	3.63	\$12.42	\$119.61	6.01	20.56	\$287.02
Reference	2.68	\$16.55	0.91	\$3.10	\$19.14	1.50	5.13	\$31.68
Internet Wrkstation Use Hours	0.30	\$3.57				0.17	0.57	\$6.83
Programs	0.65	\$3.25	0.22	\$0.75	\$3.76	0.36	1.24	\$6.22
	Total Value	\$698.73		Total Value	\$581.95		Total Value	\$1,336.95
	Total Spent	\$60.66		Total Spent	\$60.66		Total Spent	\$60.66
	Total Saved	\$638.08		Total Saved	\$521.30		Total Saved	\$1,276.30

Calculating the average of all families in Hawaii savings was done as follows:

- Calculate the per capita usage for each library service category by dividing use figures for each library service category by the population.
- Calculate per family usage by multiplying per capita usage in each library service category by the average Hawaii family size of 3.42 people.
- Calculate the market value of family usage in each library service category by multiplying the per family usage in each library service category by the market rate in each library service category.
- Calculate the total market value of family usage by summing the market value of family usage from each library service category.
- Then calculate the tax per capita by dividing the state and federal tax revenue received by HSPLS by the Hawaii population.
- Calculate the tax per family by multiply the tax per capita by the average size of a Hawaii family (3.42 people).

Calculate the average annual savings per family by subtracting total market value of family usage from the tax per family.

¹³⁴ See Table I-4b above for how calculated.

Appendix I-5 Talk Story Form and Instructions

TALK STORY

ABOUT THE
WORTH OF YOUR LIBRARY

Please use the rest of this page and the back side to tell new members of our community, the library staff, state government officials, and potential donors about how your library has been worth it to you. Turn your story in at the desk and THANKS!

First Name (optional): _____ Library: _____

Briefly describe who you are (if it would help someone appreciate your story -- optional)

Please tell us your story:

Talk Story about the Library

Instructions to Library Staff

Purpose

We are trying to acquaint new members of the community, taxpayers, government officials, potential donors and ourselves with the worth of our library system.

We are conducting a library market value survey that will show what it would cost to obtain selected library services commercially rather than from the library. For example, to obtain a hard back fiction book from a bookstore it might cost \$15, from the library it is free! But the market value survey will only show use value not benefit as perceived by our library users.

To try and capture some sense of the benefits of our public libraries, we hope to draw on a long-standing Hawaiian tradition of talking story about the things that matter and the things we would like to pass on.

Instructions

- 1) Please put the Talk Story forms out prominently in the library and encourage library users to take the time, in the library, to fill one out and return it to you.
- 2) Some people may want to tell you the story rather than write it down themselves. We hope you can find the time to oblige them.
- 3) We would like to get “good stories” and we would like to get stories that discuss as many different library services as possible. Don’t hesitate to seek out folks that have benefited from library services and ask them to fill out a form. Don’t forget to ask those folks who only use the library as a place to meet their group.
- 4) Library staff members may also fill out a talk story form if they recall particularly good stories about the libraries worth. Please indicate that you are library staff.
- 5) Please put the Talk Story forms out as soon as possible. Library headquarters would like whatever stories you receive on two separate occasions: December 15 and January 15 in time to be used for the upcoming legislative session. Library headquarters will use these forms to aid in obtaining funds from state government and in other fundraising efforts. Please send the Talk Story forms to Craig Nosee. Be sure to make copies of these stories for local use as well. A couple of good stories might form the basis for a good newspaper article or radio segment.

Appendix I-5a Memo to Hawaii Friends Regarding Talk Story Contest Winners

Cinco de Mayo 2003

To: Caroline Bond, Executive Director HSPLS Friends
Virginia Lowell, Hawaii State Librarian

From: Joe Ryan HSPLS Consultant

Re: Talk Story Contest Winners

Background

Chuck McClure and I needed to collect some qualitative data on HSPLS' value to its library users as part of the first phase of a study we are conducting for HSPLS. The Friends were kind enough to agree to fund a Talk Story contest last January awarding \$25 prizes for the best story form each island and \$25 prizes to the sponsoring libraries.

HSPLS received 176 entries from 36 branches. It was agreed in January (when I was here) that Craig Nosee would judge the winners. I felt (and still do) that it was out of place for a "foreigner" (me) to judge the winning entries. I learned last Thursday (May 1) that the contest winners had still not been determined (!) and have proceeded to judge the entries in the interest of time. Below is my take on the best entries and sponsoring libraries.

Oahu

Winner	Sponsoring Library
Ke Chen	McCully
Margo Morton	Mililani (also providing by far the most entries)

Hawaii

Winner	Sponsoring Library
Irene Kubica	Pahoa
Keely Jacobi	Mt. View

Kauai

Winner	Sponsoring Library
Cherilynn Kua	Waimea

Maui

Winner	Sponsoring Library
Jetly Kato	Wailuku

Molokai

Winner	Sponsoring Library
Paris Espaniola	Molokai

Winning entries are attached (not included in this appendix). As my list of winner indicates, I did not play by the rules. I awarded two winners in Oahu and two in Hawaii and a winner in Molokai. Further, should anyone in the Friends wish to pick alternates that is fine by me!

Chuck and I found the data provided by the contestants to be very helpful in our work. I enjoyed reading through the stories. But perhaps the most unexpected finding, was that the contest provided Hawaii residents with a rare creative outlet to express themselves in writing. I would like to suggest that HSPLS and the Friends sponsor additional writing contests...perhaps co sponsored by Hawaii publishers or writers groups. These simple activities offer a much needed incentive to future writers, students, seniors and others to perfect a much neglected skill. In furtherance of this notion, please find the enclosed check to the Friends for \$350 in support of your next writing contest (note, if you decide not to have other contests use the cash as you will...and please I wish to remain anonymous!).

Appendix I-6 Population Served of Peer Library Systems	
Phoenix, AZ	1,240,775
Orange County, CA	1,374,900
Sacramento, CA	1,156,800
San Diego Public, CA	1,277,200
Palm Beach, FL	1,019,409
HSPLS	1,193,001
Detroit, MI	1,027,974
Las Vegas Clark County, NV	1,034,400
Dallas, TX	1,075,894
Harris County (Houston), TX	1,178,553
San Antonio, TX	1,314,405
King County, WA	1,097,453
Average Population Served by Peers	1,047,924
HSPLS Difference from the Average	145,077

Appendix I-7 HSPLS Detailed Comparison with Peer Library Systems

Library Area of Operation	Phoenix, AZ	Orange County, CA	Sacramento CA	San Diego, CA	Library Cooperative of Palm Beach, FL	Detroit, MI	Las Vegas-Clark County, NV	Dallas, TX	Harris County (Houston), TX	San Antonio, TX	King County, WA	HSPLS	Peer Averages	HSPLS Difference from Average
Organizational Characteristics														
# Branch Libraries:	12	27	21	33	22	23	24	22	25	19	41	49	24	25
Population	1,240,775	1,374,900	1,156,800	1,277,200	1,019,409	1,027,974	1,034,400	1,075,894	1,178,553	1,314,405	1,097,453	1,193,001	1,163,433	29,568
Paid Full-Time Equivalent Staff (FTE)														
ALA-MLS Librarians:	80	102	76.5	98.63	121	158.6	106.6	128	80	127	172	159	114	45
Other Staff:	243.27	229	181.5	274.52	347.73	273.08	333.72	338.6	154.65	262.5	412.5	353.1	277.37	75.73
Total Staff:	323.27	331	269.5	382.15	472.73	431.68	440.32	468.6	244.65	392.5	697	512.1	404.85	107.25
Operating Income														
Federal Income:	\$238,603	\$118,177	\$2,564	\$32,496	\$218,551	\$159,032	\$225,092	\$65,714	\$16,155	\$210,106	\$0	\$861,635	\$142,943	\$718,692
Total Income:	\$24,622,898	\$26,428,985	\$22,726,244	\$28,302,719	\$28,234,829	\$32,809,762	\$39,979,823	\$21,996,711	\$13,159,023	\$18,222,291	\$51,914,977	\$22,789,160	\$28,036,206	(\$5,247,046)
Total Income per Capita	\$19.84	\$19.22	\$19.65	\$22.16	\$27.70	\$31.92	\$38.65	\$20.45	\$11.17	\$13.86	\$47.30	\$19.10	\$24.72	(\$5.62)
Operating Expenditures														
Total Staff Expenditures:	\$14,341,763	\$13,997,079	\$12,272,847	\$19,743,098	\$15,375,072	\$19,063,050	\$17,191,164	\$16,669,203	\$7,804,847	\$10,762,692	\$32,204,184	\$16,505,580	\$16,311,364	\$194,216
Staff % Total Oper:	60.30%	56.70%	53.90%	72.50%	58.00%	69.90%	64.10%	75.80%	65.10%	61.20%	71.90%	73.80%	64.49%	9.31%
Collection Exp:	\$3,744,039	\$3,850,873	\$3,555,000	\$3,300,000	\$4,697,840	\$2,221,474	\$4,360,795	\$3,289,532	\$1,915,689	\$3,341,507	\$6,274,848	\$2,113,805	\$3,686,509	(\$1,572,704)
Coll. Exp. per Capita:	\$3.05	\$2.80	\$3.07	\$2.58	\$4.68	\$2.17	\$4.47	\$3.06	\$1.63	\$2.54	\$5.72	\$1.77	\$3.25	(\$1.48)
Coll. % Total Oper:	15.80%	15.60%	15.60%	12.10%	17.70%	8.20%	16.20%	15.00%	16.00%	19.00%	14.00%	9.40%	15.02%	-5.62%
Capital Outlay Exp:	\$63,934	\$658,553	\$250,000	\$0	\$1,788,892	\$889,543	\$1,485,058	\$584,170	\$57,348	\$419,359	\$17,677,266	\$96,042	\$2,387,412	(\$2,291,370)
Other Expenditures:	\$5,678,738	\$6,835,368	\$6,930,925	\$4,195,006	\$6,448,876	\$5,969,395	\$5,283,755	\$2,019,272	\$2,268,781	\$3,482,489	\$6,294,301	\$3,758,736	\$5,036,991	(\$1,278,255)
Total Expenditures:	\$23,764,540	\$24,683,320	\$22,758,772	\$27,238,104	\$26,521,788	\$27,253,919	\$26,835,714	\$21,978,007	\$11,989,317	\$17,586,688	\$44,773,333	\$22,378,121	\$25,034,864	(\$2,656,743)
Total Expenditures per Capita:	\$19.34	\$17.95	\$19.67	\$21.33	\$26.40	\$26.60	\$27.51	\$20.43	\$10.17	\$13.38	\$40.80	\$18.76	\$22.14	(\$3.38)



Appendix I-7 HSPLS Detailed Comparison with Peer Library Systems (Continued)

Library Area of Operation	Phoenix, AZ	Orange County, CA	Sacramento CA	San Diego, CA	Library Cooperative of Palm Beach, FL	Detroit, MI	Las Vegas-Clark County, NV	Dallas, TX	Harris County (Houston), TX	San Antonio, TX	King County, WA	HSPLS	Peer Averages	HSPLS Difference from Average
Size of Library Collection														
Book & Serial Volumes:	1,524,914	2,443,793	1,623,805	3,063,590	1,472,260	2,993,493	2,244,804	2,321,422	1,176,574	1,756,088	2,823,222	3,194,349	2,131,270	1,063,079
Volumes per Capita:	1.24	1.78	1.40	2.40	1.47	2.92	2.30	2.16	1.00	1.34	2.57	2.68	1.87	0.81
Subscriptions:	5,000	5,070	3,896	3,374	4,297	7,134	4,545	5,644	2,975	2,172	11,164	5,881	5,025	856
Video Materials:	228,736	66,371	23,606	61,998	40,320	23,999	64,274	42,984	28,427	37,666	132,376	48,289	68,251	-19,962
Audio Materials:	95,302	91,210	37,438	101,860	74,646	94,004	101,519	31,794	32,869	65,255	213,705	204,490	85,418	119,072
Services														
Public Service Hours per Year:	50,556	69,303	43,160	86,334	60,992	48,884	52,544	57,304	60,471	53,350	111,956	100,220	63,169	37,051
Hours per Branch:	4,213	2,567	2,055	2,616	2,772	2,125	2,189	2,605	2,419	2,808	2,731	2,045	2,645	-600
Library Visits:	3,445,115	5,325,565	1,396,160	6,549,450	3,939,989	3,048,355	3,594,567	2,446,916	3,219,545	3,123,147	N/A	6,300,736	3,280,801	3,019,935
Visits per Capita:	2.80	3.87	1.21	5.13	3.92	2.98	3.68	2.27	2.73	2.38	N/A	5.28	2.82	2.46
Circulation:	8,278,829	6,037,146	3,629,798	6,381,062	6,154,144	1,228,169	5,252,780	3,738,051	5,062,798	4,326,830	12,914,177	6,947,968	5,727,617	1,220,351
Circ. per Capita:	6.74	4.39	3.14	5.00	6.13	1.20	5.38	3.47	4.30	3.29	11.77	5.82	4.98	0.84
Turnover Rate:	4.48	2.32	2.15	1.98	3.88	0.39	2.18	1.56	4.09	2.33	4.07	2.02	2.68	-0.66
Children's Circ:	N/A	2,595,636	N/A	2,763,764	1,831,625	549,140	1,728,034	1,527,667	2,047,312	1,980,484	3,099,402	2,275,951	2,013,674	262,277
Children's Program Attendance:	116,906	125,781	45,106	106,807	218,575	85,756	141,478	103,606	125,000	132,451	325,012	184,340	138,771	45,569
Reference Transact:	1,081,263	1,536,735	576,615	1,866,982	1,361,488	1,421,485	775,652	1,544,110	435,131	956,848	2,641,694	1,207,804	1,290,728	-82,924
E-Measures														
Public Internet Terminals	102	153	67	192	218	400	326	318	230	88	757	180	259	-79
Staff-Only Internet Term.	290	69	162	170	285	350	254	363	225	144	599	167	265	-98
E-Materials	28,591	2,182	N/A	3,596	240	6,418	1803	12	877	2,018	8154	2,179	5,389	-3,210
E-Access Oper. Exp:	\$352,930	\$623,099	\$1,352,181	N/A	\$300,905	\$543,052	\$260,000	\$607,301	\$992,000	\$1,124,970	\$848,441	\$762,996	\$700,488	\$62,508
E-Material Op. Exp:	\$376,494	\$41,090	\$325,000	\$365,971	\$291,511	\$150,000	\$374,096	\$359,475	\$144,226	\$293,381	\$50,381	\$148,169	\$251,966	(\$103,797)

Appendix I-8 HSPLS Comparison with Hennen's top libraries serving 500,000+													
Library Name:	Denver County, CO	Columbus OH	Multnomah County, OR	Baltimore County, MD	Indianapolis Marion County, IN	Hennepin County, MN	Salt Lake County, UT	Cuyahoga County, OH	Montgomery County, MD	Fairfax County, VA	HSPLS	Averages	HSPLS Difference from Average
Organizational Characteristics													
# Branch Libraries:	22	20	15	16	22	26	17	29	21	21	49	21	28
Population	554,636	584,201	646,850	730,969	770,684	735,050	682,620	523,022	855,000	962,800	1,193,001	704,583	488,418
Paid Full-Time Equivalent Staff (FTE)													
ALA-MLS Librarians:	120.75	162	66.41	56	149	94	68.42	144	151	143.1	159	115.47	43.53
Other Staff:	333.35	508	394.68	345.8	289.1	340.6	225.92	482.8	259.75	374.8	353.1	355.48	-2.38
Total Staff:	458.6	670	461.09	466.8	438.1	466.1	302.07	626.8	437.25	517.9	512.1	484.47	27.63
Operating Income													
Federal Income:	\$10,000	\$0	\$177,620	\$259,980	\$194,212	\$0	\$135,775	\$0	\$120,841	\$139,149	\$861,635	\$148,225	\$713,410
Total Income:	\$31,232,221	\$51,110,368	\$38,341,129	\$28,869,890	\$31,343,182	\$31,514,497	\$20,867,012	\$50,080,349	\$34,402,560	\$30,583,339	\$22,789,160	\$34,834,455	-\$12,045,295
Total Income per Capita	\$56.31	\$87.49	\$59.27	\$39.50	\$40.67	\$42.87	\$30.57	\$95.75	\$40.24	\$31.76	\$19.10	\$52.44	-\$33.34
Operating Expenditures													
Total Staff Expenditures:	\$19,720,921	\$24,526,746	\$20,687,053	\$16,733,371	\$18,162,624	\$21,194,789	\$12,372,916	\$29,114,636	\$20,736,254	\$20,758,096	\$16,505,580	\$20,400,741	-\$3,895,161
Staff % Total Oper:	64.00%	59.00%	56.80%	61.90%	60.20%	68.50%	59.30%	63.80%	63.90%	67.30%	73.80%	62.47%	11.33%
Collection Exp:	\$5,544,546	\$7,905,842	\$5,482,114	\$4,898,273	\$5,622,821	\$4,674,484	\$5,172,436	\$6,631,948	\$5,278,378	\$5,718,388	\$2,113,805	\$5,692,923	-\$3,579,118
Coll. Exp. per Capita:	\$10.08	\$13.53	\$8.48	\$6.76	\$7.47	\$7.45	\$7.58	\$12.68	\$6.23	\$5.94	\$1.77	\$8.62	-\$6.85
Coll. % Total Oper:	18.00%	19.00%	15.10%	18.10%	18.60%	15.10%	24.80%	14.50%	16.30%	18.60%	9.40%	17.81%	-8.41%
Capital Outlay Exp:	\$577,534	\$2,451,323	\$1,071,862	\$810,345	\$614,635	\$6,327,241	\$87,619	\$621,080	\$1,973,740	\$3,832,955	\$96,042	\$3,436,833	-\$3,340,791
Other Expenditures:	\$5,570,060	\$9,148,743	\$10,221,207	\$5,391,625	\$6,378,069	\$5,056,291	\$3,321,660	\$9,893,001	\$6,455,978	\$4,346,396	\$3,758,736	\$6,578,303	-\$2,819,567
Total Expenditures:	\$30,835,527	\$41,581,331	\$36,390,374	\$27,023,269	\$30,163,514	\$30,925,564	\$20,867,012	\$45,639,585	\$32,470,610	\$30,822,880	\$22,378,121	\$32,671,967	-\$10,293,846
Total Expenditures per Capita:	\$56.05	\$71.18	\$56.26	\$37.29	\$40.10	\$49.26	\$30.57	\$87.26	\$38.30	\$32.01	\$18.76	\$50	-\$31.07



Appendix I-8 HSPLS Comparison with Hennen's top libraries serving 500,000+: Detailed Look (Continued)

Library Name:	Denver County, CO	Columbus, OH	Multnomah County, OR	Baltimore County, MD	Indianapolis Marion County, IN	Hennepin County, MN	Salt Lake County, UT	Cuyahoga County, OH	Montgomery County, MD	Fairfax County, VA	HSPLS	Averages	HSPLS Difference from Average
Collection Size													
Book & Serial Volumes:	2,159,758	2,489,344	1,511,389	1,598,360	1,598,634	1,791,714	1,625,112	2,524,012	2,505,244	2,450,432	3,194,349	2,025,400	1,168,949
Volumes per Capita:	3.93	4.26	2.34	2.21	2.13	2.85	2.38	4.83	2.96	2.55	2.68	3.04	-0.36
Subscriptions:	4,700	2,295	3,847	4,347	6,026	6,275	5,409	9,000	4,539	3,353	5,881	4,979	902
Video Materials:	110,666	161,486	69,154	61,062	86,598	63,597	88,543	192,284	87,642	11,600	48,289	93,263	-44,974
Audio Materials:	47,593	243,657	125,487	112,507	161,082	125,179	124,901	314,550	121,806	57,590	204,490	143,435	61,055
Services													
Public Service Hours per Year:	50,596	83,720	45,622	52,237	73,957	60,096	50,578	104,052	56,795	66,196	100,220	64,385	35,835
Hours per Branch:	2,300	4,186	3,041	3,265	3,362	2,311	2,975	3,588	2,705	3,152	2,045	3,089	-1,043
Library Visits:	5,195,296	6,550,856	3,992,300	5,071,116	4,001,400	3,985,759	N/A	N/A	5,712,067	4,821,447	6,300,736	4,916,280	1,384,456
Visits per Capita:	9.44	11.21	6.17	7	5.32	6.35	N/A	N/A	6.74	5.01	5.28	7.16	-1.88
Circulation:	10,996,792	12,239,562	12,294,064	9,543,864	9,725,789	10,660,342	8,795,277	11,732,726	10,087,585	10,813,448	6,947,968	10,688,945	-3,740,977
Circ. per Capita:	19.99	20.95	19.01	13.17	12.93	16.98	12.88	22.43	11.9	11.23	5.82	16.15	-10.33
Turnover Rate:	4.74	4.23	7.21	5.39	5.27	5.38	4.78	3.87	3.72	4.29	2.02	4.89	-2.87
Children's Circ:	3,721,262	4,395,866	3,397,410	3,129,007	N/A	4,870,368	44,613	4,318,260	4,851,478	4,263,885	2,275,951	3,665,794	-1,389,843
Children's Program Attendance:	121,010	N/A	451,064	77,529	161,981	111,904	N/A	238,789	82,768	118,761	184,340	170,476	13,864
Reference Transactions:	1,298,687	1,333,748	773,576	1,323,951	2,333,240	1,008,585	3,517,848	1,863,160	1,275,650	1,105,959	1,207,804	1,583,440	-375,636
Electronic Measures													
Public Internet Terminals	300	666	300	347	300	483	135	185	350	70	180	314	-134
Staff-Only Internet Terminals	400	400	400	354	286	519	97	N/A	350	648	167	384	-217
E-Materials	0	300	4,578	21	303	N/A	13,584	87	10	386	2,179	2,409	-230
E-Access Oper. Exp:	\$320,840	\$1,400,000	\$1,304,880	\$910,032	\$951,739	\$574,963	\$510,220	\$1,025,642	\$320,000	\$1,563,401	\$762,996	\$888,172	-\$125,176
E-Material Op. Exp:	\$0	\$650,000	\$365,798	\$260,000	\$168,685	\$239,532	\$215,681	\$44,105	\$38,000	\$480,779	\$148,169	\$273,620	-\$125,451

Appendix I-9 Hawaii Compared to National & Peer State Norms															
Area of Comparison	National Average	Peer State Average	Hawaii	Hawaii Rank	Idaho	Idaho Rank	Maine	Maine Rank	Nebraska	Nebraska Rank	New Hampshire	New Hamp. Rank	Rhode Island	Rhode Island Rank	
Pop in thousands		1,249	1,193		1,110		1,160		1,395		1,351		1283		
Lib visits per cap	4.31	4.94	5.28	10	4.99	16	4.83	19	4.52	26	4.83	19	5.17	12	
Ref trans. per cap	1.1	0.84	1.01	18	0.84	27	0.82	29	0.77	34	0.71	38	0.86	25	
Circ. per capita	6.44	6.95	5.82	31	7.45	18	7.01	25	8.01	14	7.17	22	6.22	28	
ILLs received per 1000 pop	61.14	105.88	0.25	51	28.91	25	42.9	20	17.72	32	15	61.81	530.52	1	
Books and serials per capita	2.86	3.90	2.68	29	3.16	23	4.9	3	4.02	15	4.5	8	4.14	14	
Audio per 1000 population	119.89	119.24	171.41	6	97.69	29	89.77	32	133.31	19	127.15	23	96.11	30	
Videos per 1000 population	83.21	90.81	40.48	49	86.64	25	98.89	16	106.43	12	115.46	9	96.94	17	
Current serials per 1000 pop	7.31	9.04	4.93	37	7.23	26	10.21	15	11.38	10	13.07	7	7.39	24	
Pub access Internet terminals per 5,000 pop.	1.9	2.22	0.8		2.8		2.8		2.7		2		2.2		
Total FTE staff per 25,000 pop	12.23	13.41	10.73	31	12.64	25	14.86	12	13.2	21	14.58	14	14.45	15	
FTE librarians per 25,000 pop	4.05	5.35	3.33	36	3.93	30	6.33	10	6.56	8	6.88	6	5.09	16	
FTE ALA-MLS per 25,000 pop	2.78	2.83	3.33	10	1.13	47	2.93	17	1.91	35	3.23	11	4.44	4	
Other paid FTE staff per 25,000	8.18	8.06	7.4	28	8.71	16	8.53	20	6.64	33	7.7	25	9.36	14	
Total income per capita	\$28.96	\$24.57	\$19.10	39	21.46	36	22.49	31	24.83	25	27.13	22	32.42	16	
State income per capita	\$3.70	\$3.97	\$17.04	2	0.68	30	0.26	43	0.32	40	0.04	47	5.47	3	
Local income per capita	\$22.32	\$17.07	\$0.00	51	17.75	33	16.35	34	23.25	21	24.36	19	20.73	27	
Total operating expend per capita	\$26.42	\$23.72	\$18.76	38	20.52	31	21.62	30	24.12	25	26.39	20	30.91	15	
Total collect expend per cap	\$4.02	\$3.33	\$1.77	49	2.86	37	3.26	33	4.02	22	3.98	23	4.08	20	
Total staff expend per capita	\$16.96	\$15.68	\$13.84	28	13.1	34	13.83	29	15.03	25	17.64	19	20.63	14	
Salaries per cap	\$13.84	\$13.49	\$13.70	20	10.34	34	12.35	25	12.3	26	15.09	18	17.13	12	

Appendix I-10 Selected Talk Story Excerpts Arranged by Library

Bond Memorial public library

My library has been worth it to me because the library staff helped me get into books and start reading more. The library staff always have suggestions for new books for me. They always have something to say to put you at ease. The library's new computers have helped me to get information for reports or just type a story. Whenever I need help on anything, the library staff always lend a helping hand. – Author is a self described 7th grader who uses Bond Memorial public library.

While living abroad, we spent quite a bit of money on books from best sellers to children's school workbooks. Now we rarely buy books and rely on the library for the latest books and the classics. I know my library is responsible for not only my children reading more but I also read more too. You don't realize how valuable something is until you don't have access to it anymore. All of us in Hawaii are so fortunate to have such a great library system available to us for free. – Author uses Bond Memorial public library.

Even though I am originally from Hawaii, I never really appreciated the Hawaii public libraries until I lived in the Bahamas for eight years. There were few public libraries in the Bahamas and they were in old, falling apart buildings with horrible, old, musty, collections of books. No one used it. When we returned to Hawaii we started going to the library on a regular basis. We don't have TV reception in our house so the library is a big source of entertainment. – Author uses Bond Memorial public library.

Hawaii State Library (HSL)

Everyone knows the library is a place to get books. But many people aren't aware of how vast and diverse their resources are. One of my favorite stories is how I helped my best friend locate his father, someone he had never met. ...the only thing I had to go on was a post office box address in Texas jotted down on a corner of an old envelope. I used telephone directories to...check nearby towns...Imagine my surprise when the first person I called was the right one! I continued to use the library to find out more about my friend's Hawaiian ancestors. We found that his great-great-grandmother arrived from the Azores in 1882, where they lived, the names of their family members, their occupations, and even whether or not they spoke English! -- Author uses HSL.

My library offers more than books, magazines, and large tables to write on. Libraries are safe, quiet and offer many services. But my library is also historic...I wonder what my library looked like the day it originally opened. I often imagine my ancestors walking down these halls, with arms full of books, smiling as they found a seat to study at. As I sit at the library and daydream, I look up towards the sky and see a new set of clouds are wandering by. I realize I must get back to my work. With renewed thoughts, I go back to my homework, ready to take on the challenge. "Downtown bank teller by day, H.C.C. student by night" who uses HSL.

It occurred to me one day as I entered the library that each of the items inside the building were a kind of “forget-me-not” sent by the authors to us. So the value of my library to me is similar to the pleasure of receiving a sweet bouquet of flowers. Each author has put the best within themselves into his work hoping that you will forget-them-not. -- Author is a self described lifelong lover of learning, books, and my library which is HSL.

I am a former director of the Honolulu Zoo. My wife and I are compiling a history of the zoo. My public library has been invaluable to me in running down details from various written sources that I required for the book. -- Author uses HSL.

In our democracy, our public libraries uphold and protect our freedom to gain access to diverse viewpoints. Whenever I go to visit and read at the library, I always come away having discovered something that I never new before. On cannot put a value on our public libraries, without any doubt, our libraries are priceless. – Author uses HSL.

Everyone knows the library is a place to get books. But many people aren’t aware of how vast and diverse their resources are. One of my favorite stories is how I helped my best friend locate his father, someone he had never met. ...the only thing I had to go on was a post office box address in Texas jotted down on a corner of an old envelope. I used telephone directories to...check nearby towns...Imagine my surprise when the first person I called was the right one! I continued to use the library to find out more about my friend’s Hawaiian ancestors. We found that his great-great-grandmother arrived from the Azores in 1882, where they lived, the names of their family members, their occupations, and even whether or not they spoke English! – Author uses HSL

Hilo public library

I am in the planning process for the first ohana heritage reunion of Samuel Lincoln (relative of Abraham Lincoln) in a 140 year generation between old England, the U.S. continental and Hawaii state. The library has brought our families on West and East Hawaii closer and identified for us our heritage that is so much richer than we realized. The staff research personnel is so very helpful and readily available to assist in locating the needed material. I am more confident in the material I am using knowing that the source was selected by the librarians.... – Author is a self described mother of three, grandmother of five who uses the Hilo Public Library.

My wife and I are visiting Canadian seniors on a five month stay. One of the major services you provide is an Internet connection with our families from Japan and several provinces in Canada. The second is access to an excellent assortment of fiction and technical information on building aircraft (a hobby back home). Your selection of art related books is appreciated by my wife. Finally, the staff is very efficient and friendly which adds a lot to our enjoyment. -- Author is a self described part time resident from Canada who uses the Hilo Public Library.

I am a retiree and a grandmother. I have been a library patron for decades and appreciate the services and resources. The public library is one of my favorite places on earth

because it is a flourishing garden of learning! There are programs and resources for children, youth and adults. Author uses Hilo public library.

The day it occurred to me that the library was so much more than a book room was this past Christmas eve. It was that afternoon that I found myself at the computer terminal at the library hoping for some word from my brother from Canada. The library's Internet service enables me to have free long distance communication with a loved one. Author is a self described person of limited resources from Hilo Public Library

For me, the library is a one stop life enrichment center that gives equal treatment to rich and poor. From pamphlets to magazines to Hawaiian; the facts and records of things, to flights of imagination and chicken soup for our soul—its all at my local library and I am richer for it. Author is a self described long time resident and avid reader from Hilo Public Library

There are times in my life when the only medicine that would cheer me up is a trip to the library. I suffer with terrible depression. Sometimes I know why, most times I don't. Reading has strengthened, supported and comforted me. Weird, yeah? So anyway, the worth of the library to me is equal to sanity, freedom, getting-on-with-life. The librarians probably don't realize what a safe haven they are to me. ...There are times when they are light angels in my dark day. Many times I have walked out of the library, loaded with books, feeling the first hints of relief. Don't worry about me, I have my doctor, I take medicine, maybe someday I'll even get well. But in the meantime, I have my library to get me through. – Author is a self described single mother, poet, writer, dreamer who uses Pahoehoe and Hilo public libraries.

Kahuku public library

When I moved to Hawaii, my first connections here were with my library and with my church. Through the Friends of the Library group I have met neighbors and come to feel at home. I teach my students that a library is yours for a lifetime...and I am living proof! -- Author uses Kahuku public library.

I am handicapped and before I became ill I managed a chain bookstore in a mall. I love books and would have done anything to work near them. Since I became ill, I cannot afford to buy books any more. The library is invaluable to me. I used to go to the bookstore periodically to see what was new. Now, with the computer, best seller lists etc. I can find what I need and order it from libraries anywhere in the state and they will send it to my library for pick up. Using the computers at the library have also helped me to understand my illness. About all I can do now is read, and the libraries keep me supplied with books. – Author uses Kahuku public library.

Kaimuki public library

I get all my information for school at the public library. I have access to the Internet and assistance from friendly librarians. The library is cool, the rest rooms clean and I have a quiet place to do my homework. -- Author is a self described 12 year old boy who uses Kaimuki public library.

Kalihi-Palama public library

When I think of the library, the image of a sanctuary comes to mind. ...I appreciate the quiet ambiance and having convenient access to a wealth of resources available merely by using my passport, I mean library card. I escape my daily cares and stresses with adventure and mystery novels. To put me to sleep, I read a technical book, usually dealing with computers. Guaranteed.Thus, I have know disagreement with the conventional wisdom that says that the library is a valuable cultural, literary, educational and recreational resource. But from my perspective, the library is also simply, a warm friendly, understated yet easily accessible sanctuary that welcomes everyone. --The author uses Kalihi-Palama public library.

Kalua-Kona public library

As an artist, I have found wonderful books on art that have helped me in my work. There are books that teach technique and books with new ideas. One day I discovered a terrific reference book on the history of art. The book took me on a journey to many museums. I didn't have to go anywhere, but it took me everywhere! Sometimes I wonder if people forget about the free services offered by our libraries. I wonder if we have become so jaded that we believe we have to spend a lot of money in order to feel good or to gain knowledge. The library is a big gift, a gift of knowledge to the community in which it sits. Lucky and enriched are the folks who open the gift and enjoy its contents. -- Author is a self described artist and Friend of the Library who uses Kalua-Kona public library.

Kealakekua public library

This past year I became passionately interested in the future of food and farming in Hawaii. I did not know how to use a computer to research this subject so I went to my local public library and the librarian showed me how. The library's help has enabled me to be of better service to my community. I help found a local that works on environmental issues that will directly effect Hawaii's future. The public library is one government service from which I get direct use and benefit. Libraries, in providing services to citizens like me, directly strengthen Hawaii communities. We are indeed fortunate to be blessed with the opportunity that our libraries provide to expand our knowledge and use this to benefit our communities and future generations. -- Author is a self described teacher, gardener and mother who uses Kealakekua public library.

Kihei public library

There are no cell phones allowed in the library. That means when I am there I can't get bad news! Whether I'm reading at pools or schools, or simply fleeing a frazzled world, the public library provide. – Author uses Kihei public library.

Koloa Public Library

When I moved here 15 years ago from a large mid-western city, I had know history of using my local library – in fact, I don't think I'd ever been in the library there. I kind of wondered in to the library one day just to see what was there. What I found was the library staff was very “user friendly.” What looked like a small school library was really a gateway into the Hawaii State Library System. While the actual number of books in the building was fairly small, I discovered that I could request any book in the statewide system and eventually I would receive a postcard in the mail telling me that the book was being held for me to pick up. After a while the staff noticed what kind of books I was reading and suggested others that they thought I might enjoy. To me, this is an example of how a library should work! – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

Koloa is a small library with limited materials budget. We wanted to get some investment periodicals but couldn't afford their high subscription prices. Three years ago the Kauai Women's investors Club came to the library with a proposal . They wanted to get Value Line for club members. To make it accessible to all members hey asked if the library could house it. So the club members each gave the Kola Friends of the library a check for a share of the subscription cost. The Friends then ordered *Value Line*. It's been three years now. Thanks to the partnership between the Club and the Friends, Koloa Library can offer access to Value Line. From David Thorp, Koloa Branch Manager

Four years ago a local farmer came to the library seeking help in finding information on edible flowers. After an extensive search we located several books on the topic and ordered them for the patron. The patron, Phil Sheldon and his wife Mary, borrowed the books and came back some weeks later to request others on the topic. They must have been inspired by what they read. Phil and Mary are now the leading provider of edible flowers to upscale restaurants on Kauai. From David Thorp, Koloa Branch Manager

About 7 or 8 years ago, I started a program where men (specifically) from the Rotary Club came into the K, 1 and 2 grade classrooms to read to the kids each week. As I was picking books to read, it occurred to me that the Club might be able to donate funds to the library to purchase more of the kind of books that were age-appropriate for these grades. By now, I'm guessing that the Club has purchased something like 200 books to add to the library's collection with the assistance of the library's staff. – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

Lahaina public library

I used to spend a lot of money on paperback books, magazine subscriptions, and other reading material. Now that I am more financially limited, I find all these materials at my disposal right here at the library. This access to me is a savings of time, money and stress. I am one library patron who is very grateful for this resource. Mahalo! –Author is a self described 20+ year resident of the west side of Maui who uses Lahaina public library.

The library is a good place to escape into a book, enjoy the daily paper and magazines. This place offers resources that we couldn't afford otherwise. – Author is a self described person who likes to read and who uses Lahaina public library.

Lanai public library

The library is so much better than being some place that is junk. The library has everything I need...they have electronic gaming books, tips about how to play, and computer searching that gives me some good ideas. – Author uses Lanai public library.

The value of my library is that I have something to do. I can borrow books instead of buying one. I can look on the Internet on the computer to do research or homework or have fun. -- Author is a self described 11 year old who uses Lanai public library.

I really like the library because I can borrow interesting books and borrow CDs and videos. Every once and awhile I like to read a book and do my homework too. Sometimes my friends come along with me. But what I really like about the library is that we have time to go there to read, go on the computer and do our homework. -- Author is a self described grade 6 student who uses Lanai public library.

Laupahoehoe public library

The value of my library lies mostly in its staff...– Author uses Laupahoehoe public library.

A person could get a college education just by using the resources at the library and it wouldn't cost them a dime. That's why I love our library. – Author uses Laupahoehoe public library.

My seven year old daughter loves to read and would have put us in the poor house if we had to purchase all the books she read from the library. – Author and daughter use Laupahoehoe public library.

What is the library worth? How can one value the wealth of information available only through the library? Time and again I find myself at the library's door before it opens I'm so eager to get an answer to the latest question I have. And I know the library will have the answer served up with charm and wit by the library's information specialists. Personally, I think I would move should they close this branch. It's one (of

the many) reason(s) why we bought land up slope. But as time has passed we have come to appreciate the library more and more as a refreshing oasis of joyful civility that never seems to fail to lift our spirits. – Author is a self described art critic and author of six books who uses Laupahoehoe public library.

My seven year old daughter loves to read and would have put us in the poor hours if we had to purchase all the books she read from the library. – Author and daughter use Laupahoehoe public library.

Lihue public library

In our libraries, sits a wealth of fascinating information about people just like us. They faced the same problems, decisions and travail that we do. Yet we never look to see how they dealt with those issues. In that building, the library, that many times struggles to exist, lies the wealth of centuries with answers for our lives. The person that complains about not having the chance to be educated, to be trained, sits only blocks away from the greatest educational source available today – the library. I hope we never lose our libraries for surely that will be the beginning of the decline of civilization. -- Author is a self described retired physician and freelance writer who uses Lihue public library.

Liliha public library

Many people think that the library is for geeks and old people. I think of the library as a relaxation spot. When I'm at home, there is just too much noise! ...I guess I can say that the library is my second home. I spend a lot of time there because it is peaceful and I feel comfortable there...Definitely thumbs up!! -- Author is a self described ninth grader who uses Liliha public library.

This is a story of prayers answered and a minor miracle in which the public library played an important part. My 3 year old developed an ear infection and was scheduled to spend several days in the Kaiser Hospital, beside the Illikai. I was more concerned with his feelings of abandonment than with any medical procedure. What could a mother do to spare her child such a frightening experience? I did what most mother so when there is no apparent solutions. I prayed. The help came from an unexpected place –the library. While visiting my library, I noticed a new book displayed at the check out. It told how sick children in war-time London had to be accompanied to the hospital by a family member because of an acute shortage of nurses. London hospitals discovered an unanticipated side effect. Children accompanied by a family member recovered faster. Armed with the evidence supplied by the library book I got to stay in the hospital with my son for \$25 a night. Kaiser became the first hospital on Oahu to permit parents to stay in the hospital with their sick children...of course now the rate I \$90 a night! -- Author uses Liliha public library.

Makawao public library

One time when we were so poor and my mother's sister was sick, my mother went to the library and checked out a book for her. This was because it was the nicest gift my mother could think to give to her sister that was within our means. -- Author uses Makawao public library.

I have volunteered at my library each week for the past 5 years as a storyteller and as the voice of the *Upcounty Storyline*, for a total of 780 hours. I am also the host of the library's *Young Readers Club*, a monthly book club for students, ages 8-12, for an approximate total of 60 hours (prep time) and 24 hours of hands-on activities – total 84 hours. My performance fee when I do this professionally is \$200 for a 6 hour day. So if I were to charge for my services (864 hours/6 hour day = 144 days X \$200 per 6 hour day) the total would be \$28,800 for a 5 year period. And yet, our library's patron's have enjoyed these activities for free! – Author uses Makawao public library.

For me, a single mom, the library is a place to have time working with my child on their interests and a place to work on my own dreams. – Author uses Makawao public library.

Personally, I can not place a dollar amount on the help I have received from any of the library staff on reference questions that assist me in my writing career. Nor knowing I have a warm and friendly place five minutes from my house where I can read or discuss books. The value of my library? PRICELESS! -- Author uses Makawao public library.

My neighborhood library is the heart of our community. The library helps me figure out how to wire a lamp, paint a wall, plant a garden. It makes me an informed voter and builds on my years of continuing education. It helps make me a good, contributing citizen. The library brings cultural events to our town that we might not otherwise get to be part of – storytellers, actors and performers. At our library we share a concern for and involvement in our local community that is vital to its viability as a democratic community. – Author uses Makawao public library.

Put a dollar value on the library –impossible! It is a priceless resource to our community. – Author uses Makawao public library.

McCully public library

I am 41 years old. I am married, disabled and pray and dream of someday being able to work. My husband and I are very poor and library books keep me going! My name is Taigna and I have lived here for 8 months. One thing I like about the library is that people here can pronounce my name! Boy, that never happened on the mainland. I have a disease that causes me to be largely bedridden for years. I truly love books on tape and I don't get out much except to get to the library to get them. The books on tape have been very important to me. I don't read much anymore due to my condition and they really improve my outlook rather than just 'laying in bed,' 'alone.' Having know family of my own I really appreciate this! -- Author uses McCully public library.

Who am I? no one special. I 'm not pretty or popular or super smart. I'm not a native speaker, so I have a lot of problems with words. When I just got here from China, my mom had to work and go to night time classes at HPU. I didn't know any English. So one day I decided to borrow some picture books from the library to help me with my vocabulary. When I stepped into this library, I was stunned at how new all the facilities were. The librarians were kind and helped me find books when I was so clueless where everything was. It seemed that when I was in the library I didn't feel like an outcast. It was where I met my first friends. -- Author is a self described 13 year old girl from China who uses McCully Public Library.

To me, the library is a great place...Last year I even volunteered to help out at the library during the summer. But I was under age. I plan to apply again when I am old enough. -- Author is a self described eleven year old girl who uses McCully public Library

'And the winner of the accelerated reader program at ...Elementary School is'... Me! As I stood up to receive my award I smiled, 'Thank you public library! I didn't always like to read. In fact I hated reading. And going to the library on a perfectly good Saturday afternoon was definitely at the bottom of my list of fun. It was so boring! But I had to go for a book report. I hated book reports. You actually had to READ a book...I tried to do a book report based on the TV version and got caught. After hours of brooding I chose *Ella Enchanted* by Gail Carson Levine. ...Little did I know that that one event had changed my life. The library became my best friend, helping me through all the sad times, though 'thick and thin,' 'rain or shine.' So as I stood there on the stage, on my last day of elementary school, I flashed back to that day in the library. I laughed with the \$25 gift certificate to Borders in my hand. I knew I didn't need it after all. Who needs the bookstore when you've got the public library just around the block?! --Author uses McCully Public Library.

The value of the library is very high. If there were know libraries in the world...we could never be smart and get a good job. Because without libraries, we would never get to read what someone wrote. Without libraries, people would keep their thoughts to themselves... The library is a good place for people who have loud people in their family. They can go to the library and read a book or study quietly. The library is sort of like a refuge because it is safe. Libraries are the best! Author is a self described 6th grader who uses McCully public library.

Mililani public library

I didn't realize how valuable HSPLS is to me until I lost my library card, without a library card, I was unable to borrow books, DVDs, CDs, videos, use the Internet, etc. The library allows me to save money.... Author is a self described frequent library user who uses Mililani Public Library.

I like the library. It is my best friend and it is always there for me! I love it! I read books every day. I finish an average of one book a week. -- Author uses Mililani public library. -- Author uses Mililani public library.

I fell in love with the library as a child. When I read the library's books it was as though the characters became my friends. There have been many ups and downs in my life since then. When I was in my twenties I experienced a personal family crisis. I didn't know how I should feel or how to deal with it. I felt completely alone in the world and was unable to talk about it to anybody. I went to the library and researched the subject. I remember feeling as though I was gaining some control over my life. I felt more at peace when I left that day. I was so grateful for a place that anyone can go and research a subject objectively without censorship or condemnation. Since then the library has given me the capability of trying new things and seeing if I like it. Where else can you go and have accessibility to all kinds of knowledge, reading materials and music regardless of race, gender or income-level. I don't know of any other place. The library for me has been a sanctuary, inspiration and great knowledge base. Now that I have two small children I bring them to the library. It is like a circle being completed. One of the greatest gifts that I feel that I could give to my children is the love of books and the library helps make that happen... The worth of libraries...priceless!!! --Author uses Mililani Public Library.

I am a stay-at-home mom who has been doing reading for entertainment and craft projects at my children's school for the past eight years. The library has been invaluable in preparing for these projects. So you ask the worth of my library card to me? Our son is in his last year of elementary school and I know this will be my last year of reading projects too. I have eight years of memories from this work, supported by library resources, that don't have a dollar value. These years have been one of those privileges that show that the best things in life (like a library card) are free. – Author uses Mililani public library.

I may be a senior citizen but I am not old and I am still learning and growing...From 1999 to 2003, I have read 175 books from my public library. The library helped me in changing my life around; I am thankful. – Author uses Mililani public library

I realize now as an adult that being exposed at an early age to reading and books in my neighborhood library gave me a sense of self-confidence and esteem. It helped me excel in school and become a confident student. There was, and still is, a continuous yearning for knowledge. I believe the value of our library is immeasurable because it teaches and provides us with so many things...discipline, knowledge, inspiration, the freedom to choose...We are fortunate to live in a country where we can expose ourselves to many diverse forms of communication. ...The library is a house of knowledge and nourishment for the mind and soul. -- Author uses Mililani public library.

When my son was two, he attended his first Story Time. For the past 1½ years we've been going regularly, and it's been such a wonderful experience for both of us. We laugh together, play together, and learn together, and learn together while listening to stories and working on crafts. After Story Time, we usually find a quiet spot at the library. While relaxing at home, riding in a car, or out running errands, my son will sometimes spontaneously start singing songs he learned at the library. His songs always bring a

smile. For our family, the library has definitely been priceless. -- Author uses Mililani public library.

Several years ago I helped my class of E.S.L. students obtain a library card. They were astonished that it was free. ...What? No cost? America, how lucky we are! -- Author is a self described first generation Italian who uses Mililani Public Library.

I am 14 ½ and I don't like to read a lot. But when I find the right book I'm hooked and I try to find more book like it. I didn't like reading until I started going to the library. There are more choices of what to read there and I get to experiment. Reading is no longer boring. – Author uses Mililani public library.

We often meet our friends at the library I am so glad to know about this wonderful resource...the Hawaii library system and all it offers for everyone in the family! Thank you! -- Author is a self described mother of a three year old girl. They use Mililani public library.

I love my library because I love all places with books!
I am writing this poem for my favorite library.

Books can take you to far off places.
In one book, "Alice" meets twos and aces.
Libraries have books and things
You will feel like you have wings!
A mind is like an open door,
So many books to explore.
Books can make you cry,
Or imagine you can fly.
So, look in book
and get hooked.

Take home many,
It doesn't cost a penny! -- Author is a self described home schooled, almost 8, who uses Mililani public library.

I look forward to contributing to society, my community, and my state when I graduate from college. I look back to coming back to my neighborhood library and giving a speech to the young children saying I studied here when I was younger and received a whole lot of education and knowledge. I want to say **READING IS GREAT!** Author is a self described 8 year old who uses Mililani Public Library.

Molokai public library

I am eleven years old. I like to read lots of books especially mysteries. Books put my brain into imaginary things. That's what I like, this library gets me into reading imaginary books that help me feel good when I'm feeling down. You get to imagine anything if you read a book. A friend of mine said, 'You know books may look boring

on the cover. But it depends how much you imagine and really get yourself into the book.’ –Author uses Molokai public library.

My library lets its users know you are in Hawaii. Wide rattan reading chairs are anchored beneath the Dickey-style loft of a high hale roof that would allow sweeping trade winds to pass through had the library not been walled and air-conditioned. The green building, the most beautiful in our town, stands guarded by palms and a quiet, large copper, sculpture emerging from thick, unnamed grass that covers the ground like the sea. Spider lilies, Tahitian gardenia, a good collection of Michener, and the reader is on the fringe of paradise. –Author uses Molokai public library.

Mountain View public library

The value of knowing how to read is priceless. Having a place to use this knowledge is priceless too...I think that you really can't say how much libraries are worth because they are some of the most precious things to have. To me, a library is like a room full of precious gems, each one an original design. – Author is a self described nine year old girl who uses Mountain View Public Library.

Na'alehu public library

In an hour and a half at my library, I was able to fill many of my personal needs. We live in a world that allows us to be enriched beyond the everyday working world around us if we so choose. Getting myself connected to the bigger outside world in a warm and friendly and relaxing atmosphere amongst “friends,” the library books – who could ask for more? – Author is a self described former teacher, muralist and writer who uses Na'alehu public library.

I am an unemployed female with medical problems living in a rural area. The library has been my lifeline. Living in a rural area with no electric, the library gives me access to the Internet to check on medical data and via e-mail to communicate with family and friends on the mainland. Without the Internet and the friendly library staff I would be totally isolated and out of communication for long periods of time. – Author uses Na'alehu Public Library.

Pahoa public library

I'm over seventy and have lived in many foreign countries. I recommend the library, and especially Hawaii's library system in which books can be got from any other library in the state. Many other places are not as good as this. Author is a self described owner of a day lily nursery and uses Pahoa Public Library

There is great entertainment value to having access to libraries. I don't need a TV or radio. The books I read for entertainment don't have advertising. I can laugh as loudly or as hard as I want and not miss a single line of dialogue! The family can't switch channels just as the most interesting story comes on. When family or friends visit or

need help, a simple bookmark hold my place until I return. Books come with pictures in color and in black and white! I have the sole choice in which 'gem' to pick. -- Author uses Pahoa public library.

The library is a virtually endless source of information. Now, with the Internet connection in addition to the thousands of books and periodicals, there is probably no subject on which information is not available. I have found many books of interest regarding my flower growing business including how to grow the flowers, how to market them, advertising, record-keeping, accounting etc. My company has a web site which can be seen on computers at the library. Author is a self described owner of a day lily nursery and uses Pahoa public library.

The library's magazines are so varied that it would be beyond my means to duplicate a portion of them coming to my home separately. – Author uses Pahoa public library.

I taught my child that learning is an everyday thing, not something that happens only to a few or in school. Learning is lifetime long. If I want to improve myself in mind, body or spirit, my library has the materials to help me. Being a better person, cheerful, knowledgeable, well read and helpful to others due to the resources of my library has a worth beyond measure for me. – Author uses Pahoa public library.

There are times in my life when the only medicine that would cheer me up is a trip to the library. I suffer with terrible depression. Sometimes I know why, most times I don't. Reading has strengthened, supported and comforted me. Weird, yeah? So anyway, the worth of the library to me is equal to sanity, freedom, getting-on-with-life. The librarians probably don't realize what a safe haven they are to me. ...There are times when they are light angels in my dark day. Many times I have walked out of the library, loaded with books, feeling the first hints of relief. Don't worry about me, I have my doctor, I take medicine, maybe someday I'll even get well. But in the meantime, I have my library to get me through. – Author is a self described single mother, poet, writer, dreamer who uses Pahoa and Hilo public libraries.

The library for me is a banquet for the mind;
A plentiful selection of food for thought and, it is free!
There is a 'free lunch,' it is the library. – Author is a self described vegan chef, author, and cable TV host (among other talents). He uses Pahoa public library.

Thelma Parker public library

I like when my dad reads Clifford books from the library to me! -- Author is a self described 5 year old who uses Thelma Parker public library.

Pearl City public library

...I had recently been divorced...I felt so worthless so I decided to return to the University to acquire new skills. Going back to school was an eye opener. ...and the last

time I was in a library was back in the early 60's when doors were manually pushed open. One day I walked into my neighborhood library. I scanned the room searching for the card catalog mumbling, 'Shoots, what happened to it? It used to be right near the entrance.' 'Not anymore,' the friendly librarian smiled and chuckled, 'Now you get information from the computer.' I turned and realized how dated I had become as I watched the group of people searching for information at computers. What in the world did I get myself into! I was petrified. Then, as though she could read my mind, the librarian smiled and said, 'Come, I'll show you. Its very easy. You'll learn in no time.' ...In time, I completed my program and began teaching. Although years have passed since those days...I still have fond memories of the warmth and special kindness that flowed naturally along with the help that was given. Now, I take my students to the library with the hope that they will experience what I experienced at the library. – Author uses Pearl City Library.

The library is the hub of my community. It is not just a building with textbooks and magazines, there is so much more inside: people who are gentle, compassionate, patient, friendly, generous, warm, with sincere care for their community. – Author uses Pearl City Library.

I am from Korea and I would like my son to continue to learn a lot of good English words as he has for the past 18 months. After I started bringing my son to storytime I looked around and started to read myself. Easy for me because my son likes books and wants me to read. He cries when he has to return books. I usually get a lot of books at the Friends of the Library book sale. My husband also likes storytime and supports me when we come to the library. –Author uses Pearl City public library.

Princeville public library

My library is so special to our family. The library has provided books and videos on a variety of topics for our home school study units. If I need books on a topic, the librarians help me locate them quickly. They have requested books and videos related to our studies from around the state. Without the wonderful library and librarians, we would have a lot harder time home schooling. Mahalo! Author is self described home schooling mother who uses the Princeville Public Library

Waiialua Public Library

I can never forget the first time I ventured in to the library. I had seen an ad in the paper for an "electricians apprentice" training program and I wanted it bad. I hadn't a clue what was in store...study...study...study...and more study! Well that is when my library ohana jumped in and assisted me. They gave me tons of positive encouragement, searched the computers for the right books and information and endured with me in my search for study guides and test prep. materials. Walking out I had books up to my eyebrows! I studied like I had never before and wouldn't you know I passed and now I am in my third year. In my library, dreams are but an arm's reach away and my librarian

give all that magic of wonder and knowledge for all those who seek it. --Author uses Wailua Public Library.

Wailuku public library

The library is worth a lot to me because my family doesn't have money to buy books all the time, that is why we go to the library and borrow books. The library is worth a lot to me because I think it is important to read with no restrictions. The library is worth a lot to me because you can learn things in the library that are important in life. That is why I think the library is worth a lot. Author is a self described 4th grader who uses Wailuku public library.

There is nothing like the continuing sense of discovery that comes from being in a library; the appreciation of a reference librarian who, in offering assistance, discovers something previously unknown; or the camaraderie of curiosity. Libraries are the house the gruff billy goat of disinterest will never huff, puff, or blow down! I will continue to build my shelter of the same fine stuff. – Author uses Wailuku public library.

Waimea Public Library

Both high school alternative learning and special education classes have been visiting us this school year. These are students that have been suspended from class or have been placed in these classes for other reasons. The media recently have reported several studies that suggest that these students get left behind because of their classroom behavior, lack of a comfortable learning environment or overlarge class sizes. The library for these students seems to have a positive impact. The students are well behaved, observant and thoughtful during their visits. One teacher observed, 'The students like coming to the library.' A student commented, 'I feel wanted at the library, I can learn about things I never knew like my Hawaiian history. – Author is the Waimea public library Branch Manager.

What makes the library a special delight for me to go to is the wonderful librarian working there. She is so generous and caring and helpful. I can always go to her when I am having a problem in the library, and she will surely find a solution for me. The best thing about my librarian is she knows my name. I don't know how other children would feel. But I feel special because she doesn't think of me as just any other ten year old kid. She knows who I am. -- Author is a self described 10 year old from Waimea public library.

Your dreams, your questions, ideas and thoughts, your fantasies, your fears, your likes and your dislikes, are, all compiled into one thing: the library. The library's significance is so tremendous, its serious not to have access to one. The materials, and enormous information that it provides is so important to have. One building can be able to give the world to someone. I believe that the library is so important because it's a place where I can leave reality and travel into a whole new world, with books and magazines,

newspapers and the videos they offer. The peaceful and cool environment also offers a pleasant place to study. -- Author uses Waimea public library.

I think of my library as a magical place. It means a lot to me and will always be there when I need it. It's a peaceful place to do my schoolwork when I just can't concentrate anywhere else. My library is the perfect place to do some quiet reading, or I can always go there to find relaxation away from my hectic life. -- Author is a self described 10 year old who uses the Waimea Public Library.

What makes the library a special delight for me to go to is the wonderful librarian working there. She is so generous and caring and helpful. I can always go to her when I am having a problem in the library, and she will surely find a solution for me. The best thing about my librarian is she knows my name. I don't know how other children would feel. But I feel special because she doesn't think of me as just any other ten year old kid. She knows who I am. -- Author is a self described 10 year old who uses the Waimea Public Library.

Our library is very important and valuable. Before I started coming to the library I wasn't that smart in school. When I started to come to the library, my grades improved and I was doing real well and I also became happy because I was turning my work in on time. In conclusion, I think that people should go to the library because the workers are patient and willing to help you. Your grades will improve and when you come here you'll always know that you are safe. There are no distractions which is why when you come to the library you will always get things done. -- Author uses Waimea public library.

Appendix I-11 Selected Talk Story Data Arranged by Topic**General****My Library**

I love my library because I love all places with books!
I am writing this poem for my favorite library.

Books can take you to far off places.
In one book, "Alice" meets twos and aces.
Libraries have books and things
You will feel like you have wings!
A mind is like an open door,
So many books to explore.
Books can make you cry,
Or imagine you can fly.
So, look in book
and get hooked.
Take home many,
It doesn't cost a penny! -- Author is a self described home schooled, almost 8, who uses Mililani public library.

As an artist, I have found wonderful books on art that have helped me in my work. There are books that teach technique and books with new ideas. One day I discovered a terrific reference book on the history of art. The book took me on a journey to many museums. I didn't have to go anywhere, but it took me everywhere! Sometimes I wonder if people forget about the free services offered by our libraries. I wonder if we have become so jaded that we believe we have to spend a lot of money in order to feel good or to gain knowledge. The library is a big gift, a gift of knowledge to the community in which it sits. Lucky and enriched are the folks who open the gift and enjoy its contents. -- Author is a self described artist and Friend of the Library who uses Kalua-Kona public library.

Library Staff

The value of my library lies mostly in its staff...-- Author uses Laupahoehoe public library.

What makes the library a special delight for me to go to is the wonderful librarian working there. She is so generous and caring and helpful. I can always go to her when I am having a problem in the library, and she will surely find a solution for me. The best thing about my librarian is she knows my name. I don't know how other children would feel. But I feel special because she doesn't think of me as just any other ten year old kid. She knows who I am. -- Author is a self described 10 year old from Waimea public library

Personally, I can not place a dollar amount on the help I have received from any of the library staff on reference questions that assist me in my writing career. Nor knowing I have a warm and friendly place five minutes from my house where I can read or discuss books. The value of my library? PRICELESS! -- Author uses Makawao public library.

When I moved here 15 years ago from a large mid-western city, I had know history of using my local library – in fact, I don't think I'd ever been in the library there. I kind of wondered in to the library one day just to see what was there. What I found was the library staff was very “user friendly.” What looked like a small school library was really a gateway into the Hawaii State Library System. While the actual number of books in the building was fairly small, I discovered that I could request any book in the statewide system and eventually I would receive a postcard in the mail telling me that the book was being held for me to pick up. After a while the staff noticed what kind of books I was reading and suggested others that they thought I might enjoy. To me, this is an example of how a library should work! – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa public library

I am in the planning process for the first ohana heritage reunion of Samuel Lincoln (relative of Abraham Lincoln) in a 140 year generation between old England, the U.S. continental and Hawaii state. The library has brought our families on West and East Hawaii closer and identified for us our heritage that is so much richer than we realized. The staff research personnel is so very helpful and readily available to assist in locating the needed material. I am more confident in the material I am using knowing that the source was selected by the librarians.... – Author is a self described mother of three, grandmother of five who uses the Hilo Public Library.

My wife and I are visiting Canadian seniors on a five month stay. One of the major services you provide is an Internet connection with our families from Japan and several provinces in Canada. The second is access to an excellent assortment of fiction and technical information on building aircraft (a hobby back home). Your selection of art related books is appreciated by my wife. Finally, the staff is very efficient and friendly which adds a lot to our enjoyment. -- Author is a self described part time resident from Canada who uses the Hilo Public Library.

My library has been worth it to me because the library staff helped me get into books and start reading more. The library staff always have suggestions for new books for me. They always have something to say to put you at ease. The library's new computers have helped me to get information for reports or just type a story. Whenever I need help on anything, the library staff always lend a helping hand. – Author is a self described 7th grader who uses Bond Memorial public library.

Senior Citizens

Many people think that the library is for geeks and old people. I think of the library as a relaxation spot. When I'm at home, there is just too much noise! ...I guess I can say that the library is my second home. I spend a lot of time there because it is peaceful and I feel comfortable there...Definitely thumbs up!! -- Author is a self described ninth grader who uses Liliha public library.

When I moved here 15 years ago from a large mid-western city, I had know history of using my local library – in fact, I don't think I'd ever been in the library there. I kind of wondered in to the library one day just to see what was there. What I found was the library staff was very “user friendly.” What looked like a small school library was really a gateway into the Hawaii State Library System. While the actual number of books in the building was fairly small, I discovered that I could request any book in the statewide system and eventually I would receive a postcard in the mail telling me that the book was being held for me to pick up. After a while the staff noticed what kind of books I was reading and suggested others that they thought I might enjoy. To me, this is an example of how a library should work! – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

About 7 or 8 years ago, I started a program where men (specifically) from the Rotary Club came into the K, 1 and 2 grade classrooms to read to the kids each week. As I was picking books to read, it occurred to me that the Club might be able to donate funds to the library to purchase more of the kind of books that were age-appropriate for these grades. By now, I'm guessing that the Club has purchased something like 200 books to add to the library's collection with the assistance of the library's staff. – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

I am a retiree and a grandmother. I have been a library patron for decades and appreciate the services and resources. The public library is one of my favorite places on earth because it is a flourishing garden of learning! There are programs and resources for children, youth and adults. Author uses Hilo public library.

A person could get a college education just by using the resources at the library and it wouldn't cost them a dime. That's why I love our library. – Author uses Laupahoehoe public library.

I may be a senior citizen but I am not old and I am still learning and growing...From 1999to 2003, I have read 175 books from my public library. The library helped me in changing my life around; I am thankful. – Author uses Mililani public library.

I'm over seventy and have lived in many foreign countries. I recommend the library, and especially Hawaii's library system in which books can be got from any other library in the state. Many other places are not as good as this. Author is a self described owner of a day lily nursery and uses Paho Public Library

When I think of the library, the image of a sanctuary comes to mind.I appreciate the quiet ambiance and having convenient access to a wealth of resources available merely by using my passport, I mean library card. I escape my daily cares and stresses with adventure and mystery novels. To put me to sleep, I read a technical book, usually dealing with computers. Guaranteed.Thus, I have know disagreement with the conventional wisdom that says that the library is a valuable cultural, literary, educational and recreational resource. But from my perspective, the library is also simply, a warm friendly, understated yet easily accessible sanctuary that welcomes everyone. --The author uses Kalihi-Palama public library.

I used to spend a lot of money on paperback books, magazine subscriptions, and other reading material. Now that I am more financially limited, I fond all these materials at my disposal right here at the library. This access to me is a savings of time, money and stress. I am one library patron who is very grateful for this resource. Mahalo! –Author is a self described 20+ year resident of the west side of Maui who uses Lahaina public library.

The library is a good place to escape into a book, enjoy the daily paper and magazines. This place offers resources that we couldn't afford otherwise. – Author is a self described person who likes to read and who uses Lahaina public library.

Adult

I am in the planning process for the first ohana heritage reunion of Samuel Lincoln (relative of Abraham Lincoln) in a 140 year generation between old England, the U.S. continental and Hawaii state. The library has brought our families on West and East Hawaii closer and identified for us our heritage that is so much richer than we realized. The staff research personnel is so very helpful and readily available to assist in locating the needed material. I am more confident in the material I am using knowing that the source was selected by the librarians.... – Author is a self described mother of three, grandmother of five who uses the Hilo Public Library.

My wife and I are visiting Canadian seniors on a five month stay. One of the major services you provide is an Internet connection with our families from Japan and several provinces in Canada. The second is access to an excellent assortment of fiction and technical information on building aircraft (a hobby back home). Your selection of art related books is appreciated by my wife. Finally, the staff is very efficient and friendly which adds a lot to our enjoyment. -- Author is a self described part time resident from Canada who uses the Hilo Public Library.

The day it occurred to me that the library was so much more than a book room was this past Christmas eve. It was that afternoon that I found myself at the computer terminal at the library hoping for some word from my brother from Canada. The library's Internet service enables me to have free long distance communication with a loved one. Author is a self described person of limited resources from Hilo Public Library

For me, the library is a one stop life enrichment center that gives equal treatment to rich and poor. From pamphlets to magazines to Hawaiian; the facts and records of things, to flights of imagination and chicken soup for our soul—its all at my local library and I am richer for it. Author is a self described long time resident and avid reader from Hilo Public Library

There are no cell phones allowed in the library. That means when I am there I can't get bad news! Whether I'm reading at pools or schools, or simply fleeing a frazzled world, the public library provide. – Author uses Kihei public library.

I didn't realize how valuable HSPLS is to me until I lost my library card, without a library card, I was unable to borrow books, DVDs, CDs, videos, use the Internet, etc. The library allows me to save money.... Author is a self described frequent library user who uses Mililani Public Library.

Everyone knows the library is a place to get books. But many people aren't aware of how vast and diverse their resources are. One of my favorite stories is how I helped my best friend locate his father, someone he had never met. ...the only thing I had to go on was a post office box address in Texas jotted down on a corner of an old envelope. I used telephone directories to...check nearby towns...Imagine my surprise when the first person I called was the right one! I continued to use the library to find out more about my friend's Hawaiian ancestors. We found that his great-great-grandmother arrived from the Azores in 1882, where they lived, the names of their family members, their occupations, and even whether or not they spoke English! -- Author uses HSL.

How often have you said, 'I wish I had kept a copy of that newspaper article.' Just run down to the library, they have a newspaper collection to find a copy.

As an artist, I have found wonderful books on art that have helped me in my work. There are books that teach technique and books with new ideas. One day I discovered a terrific reference book on the history of art. The book took me on a journey to many museums. I didn't have to go anywhere, but it took me everywhere! Sometimes I wonder if people forget about the free services offered by our libraries. I wonder if we have become so jaded that we believe we have to spend a lot of money in order to feel good or to gain knowledge. The library is a big gift, a gift of knowledge to the community in which it sits. Lucky and enriched are the folks who open the gift and enjoy its contents. Author is a self described artist and Friend of the Library who uses Kalua-Kona public library.

What is the library worth? How can one value the wealth of information available only through the library? Time and again I find myself at the library's door before it opens I'm so eager to get an answer to the latest question I have. And I know the library will have the answer served up with charm and wit by the library's information specialists. Personally, I think I would move should they close this branch. It's one (of the many) reason(s) why we bought land up slope. But as time has passed we have come to appreciate the library more and more as a refreshing oasis of joyful civility that never

seems to fail to lift our spirits. – Author is a self described art critic and author of six books who uses Laupahoehoe public library.

We often meet our friends at the library I am so glad to know about this wonderful resource...the Hawaii library system and all it offers for everyone in the family! Thank you! -- Author is a self described mother of a three year old girl. They use Mililani public library.

...I had recently been divorced...I felt so worthless so I decided to return to the University to acquire new skills. Going back to school was an eye opener. ...and the last time I was in a library was back in the early 60's when doors were manually pushed open. One day I walked into my neighborhood library. I scanned the room searching for the card catalog mumbling, 'Shoots, what happened to it? It used to be right near the entrance.' 'Not anymore,' the friendly librarian smiled and chuckled, 'Now you get information from the computer.' I turned and realized how dated I had become as I watched the group of people searching for information at computers. What in the world did I get myself into! I was petrified. Then, as though she could read my mind, the librarian smiled and said, 'Come, I'll show you. Its very easy. You'll learn in no time.' ...In time, I completed my program and began teaching. Although years have passed since those days...I still have fond memories of the warmth and special kindness that flowed naturally along with the help that was given. Now, I take my students to the library with the hope that they will experience what I experienced at the library. – Author uses Pearl City Library.

The library is the hub of my community. It is not just a building with textbooks and magazines, there is so much more inside: people who are gentle, compassionate, patient, friendly, generous, warm, with sincere care for their community. – Author uses Pearl City Library.

It occurred to me one day as I entered the library that each of the items inside the building were a kind of “forget-me-not” sent by the authors to us. So the value of my library to me is similar to the pleasure of receiving a sweet bouquet of flowers. Each author has put the best within themselves into his work hoping that you will forget-them-not. -- Author is a self described lifelong lover of learning, books, and my library which is HSL.

One time when we were so poor and my mother's sister was sick, my mother went to the library and checked out a book for her. This was because it was the nicest gift my mother could think to give to her sister that was within our means. -- Author uses Makawao public library.

I have volunteered at my library each week for the past 5 years as a storyteller and as the voice of the *Upcounty Storyline*, for a total of 780 hours. I am also the host of the library's *Young Readers Club*. a monthly book club for students, ages 8-12, for an approximate total of 60 hours (prep time) and 24 hours of hands-on activities – total 84

hours. My performance fee when I do this professionally is \$200 for a 6 hour day. So if I were to charge for my services (864 hours/6 hour day = 144 days X \$200 per 6 hour day) the total would be \$28,800 for a 5 year period. And yet, our library's patron's have enjoyed these activities for free! – Author uses Makawao public library.

Personally, I can not place a dollar amount on the help I have received from any of the library staff on reference questions that assist me in my writing career. Nor knowing I have a warm and friendly place five minutes from my house where I can read or discuss books. The value of my library? PRICELESS! -- Author uses Makawao public library.

The library for me is a banquet for the mind;
A plentiful selection of food for thought and, it is free!
There is a 'free lunch,' it is the library. – Author is a self described vegan chef, author, and cable TV host (among other talents). He uses Pahoa public library.

I realize now as an adult that being exposed at an early age to reading and books in my neighborhood library gave me a sense of self-confidence and esteem. It helped me excel in school and become a confident student. There was, and still is, a continuous yearning for knowledge. I believe the value of our library is immeasurable because it teaches and provides us with so many things...discipline, knowledge, inspiration, the freedom to choose...We are fortunate to live in a country where we can expose ourselves to many diverse forms of communication. ...The library is a house of knowledge and nourishment for the mind and soul. -- Author uses Mililani public library.

In an hour and a half at my library, I was able to fill many of my personal needs. We live in a world that allows us to be enriched beyond the everyday working world around us if we so choose. Getting myself connected to the bigger outside world in a warm and friendly and relaxing atmosphere amongst "friends," the library books – who could ask for more? – Author is a self described former teacher, muralist and writer who uses Na'alehu public library.

Your dreams, your questions, ideas and thoughts, your fantasies, your fears, your likes and your dislikes, are, all compiled into one thing: the library. The library's significance is so tremendous, its serious not to have access to one. The materials, and enormous information that it provides is so important to have. One building can be able to give the world to someone. I believe that the library is so important because it's a place where I can leave reality and travel into a whole new world, with books and magazines, newspapers and the videos they offer. The peaceful and cool environment also offers a pleasant place to study. -- Author uses Waimea public library.

I can never forget the first time I ventured in to the library. I had seen an ad in the paper for an "electricians apprentice" training program and I wanted it bad. I hadn't a clue what was in store...study...study...study...and more study! Well that is when my library ohana jumped in and assisted me. They gave me tons of positive encouragement, searched the computers for the right books and information and endured with me in my

search for study guides and test prep. materials. Walking out I had books up to my eyebrows! I studied like I had never before and wouldn't you know I passed and now I am in my third year. In my library, dreams are but an arm's reach away and my librarian give all that magic of wonder and knowledge for all those who seek it. --Author uses Waiialua Public Library.

I fell in love with the library as a child. When I read the library's books it was as though the characters became my friends. There have been many ups and downs in my life since then. When I was in my twenties I experienced a personal family crisis. I didn't know how I should feel or how to deal with it. I felt completely alone in the world and was unable to talk about it to anybody. I went to the library and researched the subject. I remember feeling as though I was gaining some control over my life. I felt more at peace when I left that day. I was so grateful for a place that anyone can go and research a subject objectively without censorship or condemnation. Since then the library has given me the capability of trying new things and seeing if I like it. Where else can you go and have accessibility to all kinds of knowledge, reading materials and music regardless of race, gender or income-level. I don't know of any other place. The library for me has been a sanctuary, inspiration and great knowledge base. Now that I have two small children I bring them to the library. It is like a circle being completed. One of the greatest gifts that I feel that I could give to my children is the love of books and the library helps make that happen... The worth of libraries...priceless!!! --Author uses Mililani Public Library.

Teachers

...I had recently been divorced...I felt so worthless so I decided to return to the University to acquire new skills. Going back to school was an eye opener. ...and the last time I was in a library was back in the early 60's when doors were manually pushed open. One day I walked into my neighborhood library. I scanned the room searching for the card catalog mumbling, 'Shoots, what happened to it? It used to be right near the entrance.' 'Not anymore,' the friendly librarian smiled and chuckled, 'Now you get information from the computer.' I turned and realized how dated I had become as I watched the group of people searching for information at computers. What in the world did I get myself into! I was petrified. Then, as though she could read my mind, the librarian smiled and said, 'Come, I'll show you. Its very easy. You'll learn in no time.' ...In time, I completed my program and began teaching. Although years have passed since those days...I still have fond memories of the warmth and special kindness that flowed naturally along with the help that was given. Now, I take my students to the library with the hope that they will experience what I experienced at the library. – Author uses Pearl City Library.

When I moved to Hawaii, my first connections here were with my library and with my church. Through the Friends of the Library group I have met neighbors and come to feel at home. I teach my students that a library is yours for a lifetime...and I am living proof! -- Author uses Kahuku public library.

The library is a virtually endless source of information. Now, with the Internet connection in addition to the thousands of books and periodicals, there is probably no subject on which information is not available. I have found many books of interest regarding my flower growing business including how to grow the flowers, how to market them, advertising, record-keeping, accounting etc. My company has a web site that can be seen on computers at the library. – Author uses Pahoehoe public library.

This past year I became passionately interested in the future of food and farming in Hawaii. I did not know how to use a computer to research this subject so I went to my local public library and the librarian showed me how. The library's help has enabled me to be of better service to my community. I help found a local that works on environmental issues that will directly effect Hawaii's future. The public library is one government service from which I get direct use and benefit. Libraries, in providing services to citizens like me, directly strengthen Hawaii communities. We are indeed fortunate to be blessed with the opportunity that our libraries provide to expand our knowledge and use this to benefit our communities and future generations. -- Author is a self described teacher, gardener and mother who uses Kealahou public library.

Home Schooling

My library is so special to our family. The library has provided books and videos on a variety of topics for our home school study units. If I need books on a topic, the librarians help me locate them quickly. They have requested books and videos related to our studies from around the state. Without the wonderful library and librarians, we would have a lot harder time home schooling. Mahalo! Author is self described home schooling mother who uses the Princeville Public Library

The public library is like a free book store that anyone can use. It helps me get good grades; it gives me something to do when I'm bored, and it is easy to use. – Author is a self described ten year old who home schools.

My Library

I love my library because I love all places with books!
I am writing this poem for my favorite library.

Books can take you to far off places.
In one book, "Alice" meets twos and aces.
Libraries have books and things
You will feel like you have wings!
A mind is like an open door,
So many books to explore.
Books can make you cry,
Or imagine you can fly.
So, look in book
and get hooked.
Take home many,
It doesn't cost a penny! -- Author is a self described home schooled, almost 8, who uses Mililani public library.

Part-time Residents

My wife and I are visiting Canadian seniors on a five month stay. One of the major services you provide is an Internet connection with our families from Japan and several provinces in Canada. The second is access to an excellent assortment of fiction and technical information on building aircraft (a hobby back home). Your selection of art related books is appreciated by my wife. Finally, the staff is very efficient and friendly which adds a lot to our enjoyment. -- Author is a self described part time resident from Canada who uses the Hilo Public Library.

Parents

I like when my dad reads Clifford books from the library to me! -- Author is a self described 5 year old who uses Thelma Parker public library.

I am from Korea and I would like my son to continue to learn a lot of good English words as he has for the past 18 months. After I started bringing my son to storytime I looked around and started to read myself. Easy for me because my son likes books and wants me to read. He cries when he has to return books. I usually get a lot of books at the Friends of the Library book sale. My husband also likes storytime and supports me when we come to the library. --Author uses Pearl City public library.

My seven year old daughter loves to read and would have put us in the poor house if we had to purchase all the books she read from the library. -- Author and daughter use Laupahoehoe public library.

For me, a single mom, the library is a place to have time working with my child on their interests and a place to work on my own dreams. – Author uses Makawao public library.

We often meet our friends at the library I am so glad to know about this wonderful resource...the Hawaii library system and all it offers for everyone in the family! Thank you! -- Author is a self described mother of a three year old girl. They use Mililani public library.

I am a stay-at-home mom who has been doing reading for entertainment and craft projects at my children's school for the past eight years. The library has been invaluable in preparing for these projects. So you ask the worth of my library card to me? Our son is in his last year of elementary school and I know this will be my last year of reading projects too. I have eight years of memories from this work, supported by library resources, that don't have a dollar value. These years have been one of those privileges that show that the best things in life (like a library card) are free. – Author uses Mililani public library.

This is a story of prayers answered and a minor miracle in which the public library played an important part. My 3 year old developed an ear infection and was scheduled to spend several days in the Kaiser Hospital, beside the Illikai. I was more concerned with his feelings of abandonment than with any medical procedure. What could a mother do to spare her child such a frightening experience? I did what most mother so when there is no apparent solutions. I prayed. The help came from an unexpected place –the library. While visiting my library, I noticed a new book displayed at the check out. It told how sick children in war-time London had to be accompanied to the hospital by a family member because of an acute shortage of nurses. London hospitals discovered an unanticipated side effect. Children accompanied by a family member recovered faster. Armed with the evidence supplied by the library book I got to stay in the hospital with my son for \$25 a night. Kaiser became the first hospital on Oahu to permit parents to stay in the hospital with their sick children...of course now the rate I \$90 a night! -- Author uses Liliha public library.

I realize now as an adult that being exposed at an early age to reading and books in my neighborhood library gave me a sense of self-confidence and esteem. It helped me excel in school and become a confident student. There was, and still is, a continuous yearning for knowledge. I believe the value of our library is immeasurable because it teaches and provides us with so many things...discipline, knowledge, inspiration, the freedom to choose...We are fortunate to live in a country where we can expose ourselves to many diverse forms of communication. ...The library is a house of knowledge and nourishment for the mind and soul. -- Author uses Mililani public library.

I taught my child that learning is an everyday thing, not something that happens only to a few or in school. Learning is lifetime long. If I want to improve myself in mind, body or

spirit, my library has the materials to help me. Being a better person, cheerful, knowledgeable, well read and helpful to others due to the resources of my library has a worth beyond measure for me. – Author uses Pahoehoe public library.

When my son was two, he attended his first Story Time. For the past 1½ years we've been going regularly, and it's been such a wonderful experience for both of us. We laugh together, play together, and learn together, and learn together while listening to stories and working on crafts. After Story Time, we usually find a quiet spot at the library. While relaxing at home, riding in a car, or out running errands, my son will sometimes spontaneously start singing songs he learned at the library. His songs always bring a smile. For our family, the library has definitely been priceless. -- Author uses Mililani public library.

Authors

Personally, I can not place a dollar amount on the help I have received from any of the library staff on reference questions that assist me in my writing career. Nor knowing I have a warm and friendly place five minutes from my house where I can read or discuss books. The value of my library? PRICELESS! -- Author uses Makawao public library.

It occurred to me one day as I entered the library that each of the items inside the building were a kind of “forget-me-not” sent by the authors to us. So the value of my library to me is similar to the pleasure of receiving a sweet bouquet of flowers. Each author has put the best within themselves into his work hoping that you will forget-them-not. -- Author is a self described lifelong lover of learning, books, and my library which is HSL.

What is the library worth? How can one value the wealth of information available only through the library? Time and again I find myself at the library's door before it opens I'm so eager to get an answer to the latest question I have. And I know the library will have the answer served up with charm and wit by the library's information specialists. Personally, I think I would move should they close this branch. It's one (of the many) reason(s) why we bought land up slope. But as time has passed we have come to appreciate the library more and more as a refreshing oasis of joyful civility that never seems to fail to lift our spirits. – Author is a self described art critic and author of six books who uses Laupahoehoe public library.

Handicapped

I am handicapped and before I became ill I managed a chain bookstore in a mall. I love books and would have done anything to work near them. Since I became ill, I cannot afford to buy books any more. The library is invaluable to me. I used to go to the bookstore periodically to see what was new. Now, with the computer, best seller lists etc. I can find what I need and order it from libraries anywhere in the state and they will send it to my library for pick up. Using the computers at the library have also helped me to understand my illness. About all I can do now is read, and the libraries keep me supplied with books. – Author uses Kahuku public library.

I am 41 years old. I am married, disabled and pray and dream of someday being able to work. My husband and I are very poor and library books keep me going! My name is Taigna and I have lived here for 8 months. One thing I like about the library is that people here can pronounce my name! Boy, that never happened on the mainland. I have a disease that causes me to be largely bedridden for years. I truly love books on tape and I don't get out much except to get to the library to get them. The books on tape have been very important to me. I don't read much anymore due to my condition and they really improve my outlook rather than just 'laying in bed,' 'alone.' Having know family of my own I really appreciate this! -- Author uses McCully public library.

Immigrants

Who am I? no one special. I 'm not pretty or popular or super smart. I'm not a native speaker, so I have a lot of problems with words. When I just got here from China, my mom had to work and go to night time classes at HPU. I didn't know any English. So one day I decided to borrow some picture books from the library to help me with my vocabulary. When I stepped into this library, I was stunned at how new all the facilities were. The librarians were kind and helped me find books when I was so clueless where everything was. It seemed that when I was in the library I didn't feel like an outcast. It was where I met my first friends. -- Author is a self described 13 year old girl from China who uses McCully Public Library.

I am from Korea and I would like my son to continue to learn a lot of good English words as he has for the past 18 months. After I started bringing my son to storytime I looked around and started to read myself. Easy for me because my son likes books and wants me to read. He cries when he has to return books. I usually get a lot of books at the Friends of the Library book sale. My husband also likes storytime and supports me when we come to the library. --Author uses Pearl City public library.

Several years ago I helped my class of E.S.L. students obtain a library card. They were astonished that it was free. ...What? No cost? America, how lucky we are! -- Author is a self described first generation Italian who uses Mililani Public Library.

Young Adult

Who am I, no one special. I 'm not pretty or popular or super smart. I'm not a native speaker, so I have a lot of problems with words. When I just got here from China, my mom had to work and go to night time classes at HPU. I didn't know any English. So one day I decided to borrow some picture books from the library to help me with my vocabulary. When I stepped into this library, I was stunned at how new all the facilities were. The librarians were kind and helped me find books when I was so clueless where everything was. It seemed that when I was in the library I didn't feel like an outcast. It was where I met my first friends. -- Author is a self described 13 year old girl from China and who uses McCully Public Library.

I get all my information for school at the public library. I have access to the Internet and assistance from friendly librarians. The library is cool, the rest rooms clean and I have a quiet place to do my homework. -- Author is a self described 12 year old boy who uses Kaimuki public library.

‘And the winner of the accelerated reader program at ...Elementary School is’... Me! As I stood up to receive my award I smiled, ‘Thank you public library! I didn’t always like to read. In fact I hated reading. And going to the library on a perfectly good Saturday afternoon was definitely at the bottom of my list of fun. It was so boring! But I had to go for a book report. I hated book reports. You actually had to READ a book...I tried to do a book report based on the TV version and got caught. After hours of brooding I chose *Ella Enchanted* by Gail Carson Levine. ...Little did I know that that one event had changed my life. The library became my best friend, helping me through all the sad times, though ‘thick and thin,’ ‘rain or shine.’ So as I stood there on the stage, on my last day of elementary school, I flashed back to that day in the library. I laughed with the \$25 gift certificate to Borders in my hand. I knew I didn’t need it after all. Who needs the bookstore when you’ve got the public library just around the block?! --Author uses McCully Public Library.

Many people think that the library is for geeks and old people. I think of the library as a relaxation spot. When I’m at home, there is just too much noise! ...I guess I can say that the library is my second home. I spend a lot of time there because it is peaceful and I feel comfortable there...Definitely thumbs up!! -- Author is a self described ninth grader who uses Liliha public library.

I am 14 ½ and I don’t like to read a lot. But when I find the right book I’m hooked and I try to find more book like it. I didn’t like reading until I started going to the library. There are more choices of what to read there and I get to experiment. Reading is no longer boring. – Author uses Mililani public library.

Most of my friends think the library is boring and for dorks. But once you have been at the library long enough, you find that it can inspire you, teach you new things and open up a whole new world. I can read about pirates robbing ships, animals coming to life and so much more. The books that I’ve read here helped me so much that I received a scholarship. – Author is a self described 11 year old girl.

The value of the library is very high. If there were know libraries in the world...we could never be smart and get a good job. Because without libraries, we would never get to read what someone wrote. Without libraries, people would keep their thoughts to themselves... The library is a good place for people who have loud people in their family. They can go to the library and read a book or study quietly. The library is sort of like a refuge because it is safe. Libraries are the best! Author is a self described 6th grader who uses McCully public library.

My library has been worth it to me because the library staff helped me get into books and start reading more. The library staff always have suggestions for new books for me.

They always have something to say to put you at ease. The library's new computers have helped me to get information for reports or just type a story. Whenever I need help on anything, the library staff always lend a helping hand. – Author is a self described 7th grader who uses Bond Memorial public library.

Children

I think of my library as a magical place. It means a lot to me and will always be there when I need it. It's a peaceful place to do my schoolwork when I just can't concentrate anywhere else. My library is the perfect place to do some quiet reading, or I can always go there to find relaxation away from my hectic life. -- Author is a self described 10 year old who uses the Waimea Public Library.

What makes the library a special delight for me to go to is the wonderful librarian working there. She is so generous and caring and helpful. I can always go to her when I am having a problem in the library, and she will surely find a solution for me. The best thing about my librarian is she knows my name. I don't know how other children would feel. But I feel special because she doesn't think of me as just any other ten year old kid. She knows who I am. -- Author is a self described 10 year old who uses the Waimea Public Library.

I like when my dad reads Clifford books from the library to me! -- Author is a self described 5 year old from Thelma Parker Public Library

To me, the library is a great place...Last year I even volunteered to help out at the library during the summer. But I was under age. I plan to apply again when I am old enough. – Author is a self described eleven year old girl who uses McCully public Library

The value of knowing how to read is priceless. Having a place to use this knowledge is priceless too...I think that you really can't say how much libraries are worth because they are some of the most precious things to have. To me, a library is like a room full of precious gems, each one an original design. – Author is a self described nine year old girl who uses Mountain View Public Library.

The library is worth a lot to me because my family doesn't have money to buy books all the time, that is why we go to the library and borrow books. The library is worth a lot to me because I think it is important to read with no restrictions. The library is worth a lot to me because you can learn things in the library that are important in life. That is why I think the library is worth a lot. Author is a self described 4th grader who uses Wailuku public library.

I like the library. It is my best friend and it is always there for me! I love it! I read books every day. I finish an average of one book a week. – Author uses Mililani public library. – Author uses Mililani public library.

The library is so much better than being some place that is junk. The library has everything I need...they have electronic gaming books, tips about how to play, and computer searching that gives me some good ideas. – Author uses Lanai public library.

Our library is very important and valuable. Before I started coming to the library I wasn't that smart in school. When I started to come to the library, my grades improved and I was doing real well and I also became happy because I was turning my work in on time. In conclusion, I think that people should go to the library because the workers are patient and willing to help you. Your grades will improve and when you come here you'll always know that you are safe. There are no distractions which is why when you come to the library you will always get things done. -- Author uses Waimea public library.

The public library is like a free book store that anyone can use. It helps me get good grades; it gives me something to do when I'm bored, and it is easy to use. – Author is a self described ten year old who home schools

The value of my library is that I have something to do. I can borrow books instead of buying one. I can look on the Internet on the computer to do research or homework or have fun. -- Author is a self described 11 year old who uses Lanai public library.

I really like the library because I can borrow interesting books and borrow CDs and videos. Every once and awhile I like to read a book and do my homework too. Sometimes my friends come along with me. But what I really like about the library is that we have time to go there to read, go on the computer and do our homework. -- Author is a self described grade 6 student who uses Lanai public library.

I am eleven years old. I like to read lots of books especially mysteries. Books put my brain into imaginary things. That's what I like, this library gets me into reading imaginary books that help me feel good when I'm feeling down. You get to imagine anything if you read a book. A friend of mine said, 'You know books may look boring on the cover. But it depends how much you imagine and really get yourself into the book.' –Author uses Molokai public library.

I look forward to contributing to society, my community, and my state when I graduate from college. I look back to coming back to my neighborhood library and giving a speech to the young children saying I studied here when I was younger and received a whole lot of education and knowledge. I want to say **READING IS GREAT!** Author is a self described 8 year old who uses Mililani Public Library.

My Library

I love my library because I love all places with books!
I am writing this poem for my favorite library.

Books can take you to far off places.

In one book, "Alice" meets twos and aces.

Libraries have books and things

You will feel like you have wings!

A mind is like an open door,

So many books to explore.

Books can make you cry,

Or imagine you can fly.

So, look in book

and get hooked.

Take home many,

It doesn't cost a penny! -- Author is a self described home schooled, almost 8, who uses Mililani public library.

Library as Special Place in Community

Your dreams, your questions, ideas and thoughts, your fantasies, your fears, your likes and your dislikes, are, all compiled into one thing: the library. The library's significance is so tremendous, its serious not to have access to one. The materials, and enormous information that it provides is so important to have. One building can be able to give the world to someone. I believe that the library is so important because it's a place where I can leave reality and travel into a whole new world, with books and magazines, newspapers and the videos they offer. The peaceful and cool environment also offers a pleasant place to study. -- Author uses Waimea public library.

What is the library worth? How can one value the wealth of information available only through the library? Time and again I find myself at the library's door before it opens I'm so eager to get an answer to the latest question I have. And I know the library will have the answer served up with charm and wit by the library's information specialists. Personally, I think I would move should they close this branch. It's one (of the many) reason(s) why we bought land up slope. But as time has passed we have come to appreciate the library more and more as a refreshing oasis of joyful civility that never seems to fail to lift our spirits. -- Author is a self described art critic and author of six books who uses Laupahoehoe public library.

Hawaii

My library lets its users know you are in Hawaii. Wide rattan reading chairs are anchored beneath the Dickey-style loft of a high hale roof that would allow sweeping trade winds to pass through had the library not been walled and air-conditioned. The green building, the most beautiful in our town, stands guarded by palms and a quiet, large

copper, sculpture emerging from thick, unnamed grass that covers the ground like the sea. Spider lilies, Tahitian gardenia, a good collection of Michener, and the reader is on the fringe of paradise. –Author uses Molokai public library.

Historic

My library offers more than books, magazines, and large tables to write on. Libraries are safe, quiet and offer many services. But my library is also historic...I wonder what my library looked like the day it originally opened. I often imagine my ancestors walking down these halls, with arms full of books, smiling as they found a seat to study at. As I sit at the library and daydream, I look up towards the sky and see a new set of clouds are wandering by. I realize I must get back to my work. With renewed thoughts, I go back to my homework, ready to take on the challenge. “Downtown bank teller by day, H.C.C. student by night” who uses HSL.

Sanctuary

There are no cell phones allowed in the library. That means when I am there I cant get bad news! Whether I'm reading at pools or schools, or simply fleeing a frazzled world, the public library provide. – Author uses Kihei public library.

Who am I? no one special. I 'm not pretty or popular or super smart. I'm not a native speaker, so I have a lot of problems with words. When I just got here from China, my mom had to work and go to night time classes at HPU. I didn't know any English. So one day I decided to borrow some picture books from the library to help me with my vocabulary. When I stepped into this library, I was stunned at how new all the facilities were. The librarians were kind and helped me find books when I was so clueless where everything was. It seemed that when I was in the library I didn't feel like an outcast. It was where I met my first friends. -- Author is a self described 13 year old girl from China and who uses McCully Public Library.

I think of my library as a magical place. It means a lot to me and will always be there when I need it. It's a peaceful place to do my schoolwork when I just can't concentrate anywhere else. My library is the perfect place to do some quiet reading, or I can always go there to find relaxation away from my hectic life. -- Author is a self described 10 year old who uses the Waimea Public Library.

When I think of the library, the image of a sanctuary comes to mind.I appreciate the quiet ambiance and having convenient access to a wealth of resources available merely by using my passport, I mean library card. I escape my daily cares and stresses with adventure and mystery novels. To put me to sleep, I read a technical book, usually dealing with computers. Guaranteed.Thus, I have know disagreement with the conventional wisdom that says that the library is a valuable cultural, literary, educational and recreational resource. But from my perspective, the library is also simply, a warm friendly, understated yet easily accessible sanctuary that welcomes everyone. --The author uses Kalihi-Palama public library.

Many people think that the library is for geeks and old people. I think of the library as a relaxation spot. When I'm at home, there is just too much noise! ...I guess I can say that the library is my second home. I spend a lot of time there because it is peaceful and I feel comfortable there...Definitely thumbs up!! -- Author is a self described ninth grader who uses Liliha public library.

The value of the library is very high. If there were know libraries in the world...we could never be smart and get a good job. Because without libraries, we would never get to read what someone wrote. Without libraries, people would keep their thoughts to themselves... The library is a good place for people who have loud people in their family. They can go to the library and read a book or study quietly. The library is sort of like a refuge because it is safe. Libraries are the best! Author is a self described 6th grader who uses McCully public library.

Library as Place to Give Back

I have volunteered at my library each week for the past 5 years as a storyteller and as the voice of the *Upcounty Storyline*, for a total of 780 hours. I am also the host of the library's *Young Readers Club*. a monthly book club for students, ages 8-12, for an approximate total of 60 hours (prep time) and 24 hours of hands-on activities – total 84 hours. My performance fee when I do this professionally is \$200 for a 6 hour day. So if I were to charge for my services (864 hours/6 hour day = 144 days X \$200 per 6 hour day) the total would be \$28,800 for a 5 year period. And yet, our library's patron's have enjoyed these activities for free! – Author uses Makawao public library.

I am a stay-at-home mom who has been doing reading for entertainment and craft projects at my children's school for the past eight years. The library has been invaluable in preparing for these projects. So you ask the worth of my library card to me? Our son is in his last year of elementary school and I know this will be my last year of reading projects too. I have eight years of memories from this work, supported by library resources, that don't have a dollar value. These years have been one of those privileges that show that the best things in life (like a library card) are free. – Author uses Mililani public library.

Community Hub

The library is the hub of my community. It is not just a building with textbooks and magazines, there is so much more inside: people who are gentle, compassionate, patient, friendly, generous, warm, with sincere care for their community. – Author uses Pearl City Library.

We often meet our friends at the library I am so glad to know about this wonderful resource...the Hawaii library system and all it offers for everyone in the family! Thank you! -- Author is a self described mother of a three year old girl. They use Mililani public library.

When I moved to Hawaii, my first connections here were with my library and with my church. Through the Friends of the Library group I have met neighbors and come to feel at home. I teach my students that a library is yours for a lifetime...and I am living proof! -- Author uses Kahuku public library.

My neighborhood library is the heart of our community. The library helps me figure out how to wire a lamp, paint a wall, plant a garden. It makes me an informed voter and builds on my years of continuing education. It helps make me a good, contributing citizen. The library brings cultural events to our town that we might not otherwise get to be part of – storytellers, actors, performers. At our library we share a concern for and involvement in our local community that is vital to its viability as a democratic community. – Author uses Makawao public library.

Democratic, Uncensored Institution

In our democracy, our public libraries uphold and protect our freedom to gain access to diverse viewpoints. Whenever I go to visit and read at the library, I always come away having discovered something that I never new before. On cannot put a value on our public libraries, without any doubt, our libraries are priceless. – Author uses HSL.

My neighborhood library is the heart of our community. The library helps me figure out how to wire a lamp, paint a wall, plant a garden. It makes me an informed voter and builds on my years of continuing education. It helps make me a good, contributing citizen. The library brings cultural events to our town that we might not otherwise get to be part of – storytellers, actors and performers. At our library we share a concern for and involvement in our local community that is vital to its viability as a democratic community. – Author uses Makawao public library.

I take foreign exchange students to the library to show them what is available. They are impressed by this demonstration of “freedom in action.” – Author uses Lahaina public library.

Several years ago I helped my class of E.S.L. students obtain a library card. They were astonished that it was free. ...What? No cost? America, how lucky we are! -- Author is a self described first generation Italian who uses Mililani Public Library.

This past year I became passionately interested in the future of food and farming in Hawaii. I did not know how to use a computer to research this subject so I went to my local public library and the librarian showed me how. The library’s help has enabled me to be of better service to my community. I help found a local that works on environmental issues that will directly effect Hawaii’s future. The public library is one government service from which I get direct use and benefit. Libraries, in providing services to citizens like me, directly strengthen Hawaii communities. We are indeed fortunate to be blessed with the opportunity that our libraries provide to expand our

knowledge and use this to benefit our communities and future generations. -- Author is a self described teacher, gardener and mother who uses Kealakekua public library.

Priceless/Immeasurable

The value of knowing how to read is priceless. Having a place to use this knowledge is priceless too...I think that you really can't say how much libraries are worth because they are some of the most precious things to have. To me, a library is like a room full of precious gems, each one an original design. – Author is a self described nine year old girl who uses Mountain View Public Library.

Put a dollar value on the library – impossible! It is a priceless resource to our community. – Author uses Makawao public library.

Personally, I can not place a dollar amount on the help I have received from any of the library staff on reference questions that assist me in my writing career. Nor knowing I have a warm and friendly place five minutes from my house where I can read or discuss books. The value of my library? PRICELESS! -- Author uses Makawao public library.

Programs

Reference

There is nothing like the continuing sense of discovery that comes from being in a library; the appreciation of a reference librarian who, in offering assistance, discovers something previously unknown; or the camaraderie of curiosity. Libraries are the house the gruff billy goat of disinterest will never huff, puff, or blow down! I will continue to build my shelter of the same fine stuff. – Author uses Wailuku public library.

When I moved here 15 years ago from a large mid-western city, I had know history of using my local library – in fact, I don't think I'd ever been in the library there. I kind of wondered in to the library one day just to see what was there. What I found was the library staff was very “user friendly.” What looked like a small school library was really a gateway into the Hawaii State Library System. While the actual number of books in the building was fairly small, I discovered that I could request any book in the statewide system and eventually I would receive a postcard in the mail telling me that the book was being held for me to pick up. After a while the staff noticed what kind of books I was reading and suggested others that they thought I might enjoy. To me, this is an example of how a library should work! – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

I am in the planning process for the first ohana heritage reunion of Samuel Lincoln (relative of Abraham Lincoln) in a 140 year generation between old England, the U.S. continental and Hawaii state. The library has brought our families on West and East Hawaii closer and identified for us our heritage that is so much richer than we realized. The staff research personnel is so very helpful and readily available to assist in locating

the needed material. I am more confident in the material I am using knowing that the source was selected by the librarians.... – Author is a self described mother of three, grandmother of five who uses the Hilo Public Library.

How often have you said, ‘I wish I had kept a copy of that newspaper article.’ Just run down to the library, they have a newspaper collection to find a copy.

Everyone knows the library is a place to get books. But many people aren’t aware of how vast and diverse their resources are. One of my favorite stories is how I helped my best friend locate his father, someone he had never met. ...the only thing I had to go on was a post office box address in Texas jotted down on a corner of an old envelope. I used telephone directories to...check nearby towns...Imagine my surprise when the first person I called was the right one! I continued to use the library to find out more about my friend’s Hawaiian ancestors. We found that his great-great-grandmother arrived from the Azores in 1882, where they lived, the names of their family members, their occupations, and even whether or not they spoke English! -- Author uses HSL.

I am a former director of the Honolulu Zoo. My wife and I are compiling a history of the zoo. My public library has been invaluable to me in running down details from various written sources that I required for the book. -- Author uses HSL.

What is the library worth? How can one value the wealth of information available only through the library? Time and again I find myself at the library’s door before it opens I’m so eager to get an answer to the latest question I have. And I know the library will have the answer served up with charm and wit by the library’s information specialists. Personally, I think I would move should they close this branch. It’s one (of the many) reason(s) why we bought land up slope. But as time has passed we have come to appreciate the library more and more as a refreshing oasis of joyful civility that never seems to fail to lift our spirits. – Author is a self described art critic and author of six books who uses Laupahoehoe public library.

Internet

I am an unemployed female with medical problems living in a rural area. The library has been my lifeline. Living in a rural area with no electric, the library gives me access to the Internet to check on medical data and via e-mail to communicate with family and friends on the mainland. Without the Internet and the friendly library staff I would be totally isolated and out of communication for long periods of time. – Author uses Na’alehu Public Library.

My wife and I are visiting Canadian seniors on a five month stay. One of the major services you provide is an Internet connection with our families from Japan and several provinces in Canada. The second is access to an excellent assortment of fiction and technical information on building aircraft (a hobby back home). Your selection of art related books is appreciated by my wife. Finally, the staff is very efficient and friendly

which adds a lot to our enjoyment. -- Author is a self described part time resident from Canada who uses the Hilo Public Library.

The day it occurred to me that the library was so much more than a book room was this past Christmas eve. It was that afternoon that I found myself at the computer terminal at the library hoping for some word from my brother from Canada. The library's Internet service enables me to have free long distance communication with a loved one. Author is a self described person of limited resources from Hilo Public Library

The value of my library is that I have something to do. I can borrow books instead of buying one. I can look on the Internet on the computer to do research or homework or have fun. -- Author is a self described 11 year old who uses Lanai public library.

I didn't realize how valuable HSPLS is to me until I lost my library card, without a library card, I was unable to borrow books, DVDs, CDs, videos, use the Internet, etc. The library allows me to save money.... Author is a self described frequent library user who uses Mililani Public Library.

The library is a virtually endless source of information. Now, with the Internet connection in addition to the thousands of books and periodicals, there is probably no subject on which information is not available. I have found many books of interest regarding my flower growing business including how to grow the flowers, how to market them, advertising, record-keeping, accounting etc. My company has a web site that can be seen on computers at the library. – Author uses Pahoehoe public library.

Genealogy

I am in the planning process for the first ohana heritage reunion of Samuel Lincoln (relative of Abraham Lincoln) in a 140 year generation between old England, the U.S. continental and Hawaii state. The library has brought our families on West and East Hawaii closer and identified for us our heritage that is so much richer than we realized. The staff research personnel is so very helpful and readily available to assist in locating the needed material. I am more confident in the material I am using knowing that the source was selected by the librarians.... – Author is a self described mother of three, grandmother of five who uses the Hilo Public Library.

Interlibrary Loan

When I moved here 15 years ago from a large mid-western city, I had know history of using my local library – in fact, I don't think I'd ever been in the library there. I kind of wondered in to the library one day just to see what was there. What I found was the library staff was very "user friendly." What looked like a small school library was really a gateway into the Hawaii State Library System. While the actual number of books in the building was fairly small, I discovered that I could request any book in the statewide system and eventually I would receive a postcard in the mail telling me that the

book was being held for me to pick up. After a while the staff noticed what kind of books I was reading and suggested others that they thought I might enjoy. To me, this is an example of how a library should work! – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

Literacy

Several years ago I helped my class of E.S.L. students obtain a library card. They were astonished that it was free. ...What? No cost? America, how lucky we are! -- Author is a self described first generation Italian who uses Mililani Public Library.

Pre School Programs

When my son was two, he attended his first Story Time. For the past 1½ years we've been going regularly, and it's been such a wonderful experience for both of us. We laugh together, play together, and learn together, and learn together while listening to stories and working on crafts. After Story Time, we usually find a quiet spot at the library. While relaxing at home, riding in a car, or out running errands, my son will sometimes spontaneously start singing songs he learned at the library. His songs always bring a smile. For our family, the library has definitely been priceless. -- Author uses Mililani public library.

Employment Re-skilling

I had recently been divorced...I felt so worthless so I decided to return to the University to acquire new skills. Going back to school was an eye opener. ...and the last time I was in a library was back in the early 60's when doors were manually pushed open. One day I walked into my neighborhood library. I scanned the room searching for the card catalog mumbling, 'Shoots, what happened to it? It used to be right near the entrance.' 'Not anymore,' the friendly librarian smiled and chuckled, 'Now you get information from the computer.' I turned and realized how dated I had become as I watched the group of people searching for information at computers. What in the world did I get myself into! I was petrified. Then, as though she could read my mind, the librarian smiled and said, 'Come, I'll show you. Its very easy. You'll learn in no time.' ...In time, I completed my program and began teaching. Although years have passed since those days...I still have fond memories of the warmth and special kindness that flowed naturally along with the help that was given. Now, I take my students to the library with the hope that they will experience what I experienced at the library. – Author uses Pearl City Library.

A person could get a college education just by using the resources at the library and it wouldn't cost them a dime. That's why I love our library. – Author uses Laupahoehoe public library.

I can never forget the first time I ventured in to the library. I had seen an ad in the paper for an "electricians apprentice" training program and I wanted it bad. I hadn't a clue what was in store...study...study...study...and more study! Well that is when my library

ohana jumped in and assisted me. They gave me tons of positive encouragement, searched the computers for the right books and information and endured with me in my search for study guides and test prep. materials. Walking out I had books up to my eyebrows! I studied like I had never before and wouldn't you know I passed and now I am in my third year. In my library, dreams are but an arm's reach away and my librarian give all that magic of wonder and knowledge for all those who seek it. --Author uses Waialua Public Library

Life Long Learning

For me, the library is a one stop life enrichment center that gives equal treatment to rich and poor. From pamphlets to magazines to Hawaiian; the facts and records of things, to flights of imagination and chicken soup for our soul—its all at my local library and I am richer for it. Author is a self described long time resident and avid reader from Hilo Public Library

A person could get a college education just by using the resources at the library and it wouldn't cost them a dime. That's why I love our library. – Author uses Laupahoehoe public library.

I taught my child that learning is an everyday thing, not something that happens only to a few or in school. Learning is lifetime long. If I want to improve myself in mind, body or spirit, my library has the materials to help me. Being a better person, cheerful, knowledgeable, well read and helpful to others due to the resources of my library has a worth beyond measure for me. – Author uses Pahoehoe public library.

In our libraries, sits a wealth of fascinating information about people just like us. They faced the same problems, decisions and travail that we do. Yet we never look to see how they dealt with those issues. In that building, the library, that many times struggles to exist, lies the wealth of centuries with answers for our lives. The person that complains about not having the chance to be educated, to be trained, sits only blocks away from the greatest educational source available today – the library. I hope we never lose our libraries for surely that will be the beginning of the decline of civilization. -- Author is a self described retired physician and freelance writer who uses Lihue public library.

Library Support of Alternative Learning Approaches

Both high school alternative learning and special education classes have been visiting us this school year. These are students that have been suspended from class or have been placed in these classes for other reasons. The media recently have reported several studies that suggest that these students get left behind because of their classroom behavior, lack of a comfortable learning environment or overlarge class sizes. The library for these students seems to have a positive impact. The students are well behaved, observant and thoughtful during their visits. One teacher observed, 'The students like coming to the library.' A student commented, 'I feel wanted at the library, I can learn

about things I never knew like my Hawaiian history. – Author is the Waimea public library Branch Manager.

Business

The library is a virtually endless source of information. Now, with the Internet connection in addition to the thousands of books and periodicals, there is probably no subject on which information is not available. I have found many books of interest regarding my flower growing business including how to grow the flowers, how to market them, advertising, record-keeping, accounting etc. My company has a web site which can be seen on computers at the library. Author is a self described owner of a day lily nursery and uses Paho public library.

As an artist, I have found wonderful books on art that have helped me in my work. There are books that teach technique and books with new ideas. One day I discovered a terrific reference book on the history of art. The book took me on a journey to many museums. I didn't have to go anywhere, but it took me everywhere! Author is a self described artist and Friend of the Library.

Koloa is a small library with limited materials budget. We wanted to get some investment periodicals but couldn't afford their high subscription prices. Three years ago the Kauai Women's investors Club came to the library with a proposal . They wanted to get Value Line for club members. To make it accessible to all members they asked if the library could house it. So the club members each gave the Koloa Friends of the library a check for a share of the subscription cost. The Friends then ordered *Value Line*. It's been three years now. Thanks to the partnership between the Club and the Friends, Koloa Library can offer access to Value Line. From David Thorp, Koloa Branch Manager

Four years ago a local farmer came to the library seeking help in finding information on edible flowers. After an extensive search we located several books on the topic and ordered them for the patron. The patron, Phil Sheldon and his wife Mary, borrowed the books and came back some weeks later to request others on the topic. They must have been inspired by what they read. Phil and Mary are now the leading provider of edible flowers to upscale restaurants on Kauai. From David Thorp, Koloa Branch Manager

Rotary Club Donation

About 7 or 8 years ago, I started a program where men (specifically) from the Rotary Club came into the K, 1 and 2 grade classrooms to read to the kids each week. As I was picking books to read, it occurred to me that the Club might be able to donate funds to the library to purchase more of the kind of books that were age-appropriate for these grades. By now, I'm guessing that the Club has purchased something like 200 books to add to the library's collection with the assistance of the library's staff. – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

Adult Self Help

This past year I became passionately interested in the future of food and farming in Hawaii. I did not know how to use a computer to research this subject so I went to my local public library and the librarian showed me how. The library's help has enabled me to be of better service to my community. I help found a local that works on environmental issues that will directly effect Hawaii's future. The public library is one government service from which I get direct use and benefit. Libraries, in providing services to citizens like me, directly strengthen Hawaii communities. We are indeed fortunate to be blessed with the opportunity that our libraries provide to expand our knowledge and use this to benefit our communities and future generations. -- Author is a self described teacher, gardener and mother who uses Kealakekua public library.

I fell in love with the library as a child. When I read the library's books it was as though the characters became my friends. There have been many ups and downs in my life since then. When I was in my twenties I experienced a personal family crisis. I didn't know how I should feel or how to deal with it. I felt completely alone in the world and was unable to talk about it to anybody. I went to the library and researched the subject. I remember feeling as though I was gaining some control over my life. I felt more at peace when I left that day. I was so grateful for a place that anyone can go and research a subject objectively without censorship or condemnation. Since then the library has given me the capability of trying new things and seeing if I like it. Where else can you go and have accessibility to all kinds of knowledge, reading materials and music regardless of race, gender or income-level. I don't know of any other place. The library for me has been a sanctuary, inspiration and great knowledge base. Now that I have two small children I bring them to the library. It is like a circle being completed. One of the greatest gifts that I feel that I could give to my children is the love of books and the library helps make that happen... The worth of libraries...priceless!!! --Author uses Mililani Public Library

I may be a senior citizen but I am not old and I am still learning and growing...From 1999to 2003, I have read 175 books from my public library. The library helped me in changing my life around; I am thankful. – Author uses Mililani public library.

There are times in my life when the only medicine that would cheer me up is a trip to the library. I suffer with terrible depression. Sometimes I know why, most times I don't. Reading has strengthened, supported and comforted me. Weird, yeah? So anyway, the worth of the library to me is equal to sanity, freedom, getting-on-with-life. The librarians probably don't realize what a safe haven they are to me. ...There are times when they are light angels in my dark day. Many times I have walked out of the library, loaded with books, feeling the first hints of relief. Don't worry about me, I have my doctor, I take medicine, maybe someday I'll even get well. But in the meantime, I have my library to get me through. – Author is a self described single mother, poet, writer, dreamer who uses Pahoehoe and Hilo public libraries.

Homework Help

Our library is very important and valuable. Before I started coming to the library I wasn't that smart in school. When I started to come to the library, my grades improved and I was doing real well and I also became happy because I was turning my work in on time. In conclusion, I think that people should go to the library because the workers are patient and willing to help you. Your grades will improve and when you come here you'll always know that you are safe. There are no distractions which is why when you come to the library you will always get things done. -- Author uses Waimea public library.

Entertainment

There is great entertainment value to having access to libraries. I don't need a TV or radio. The books I read for entertainment don't have advertising. I can laugh as loudly or as hard as I want and not miss a single line of dialogue! The family can't switch channels just as the most interesting story comes on. When family or friends visit or need help, a simple bookmark hold my place until I return. Books come with pictures in color and in black and white! I have the sole choice in which 'gem' to pick. -- Author uses Pahoa public library.

Health/Medical

I am handicapped and before I became ill I managed a chain bookstore in a mall. I love books and would have done anything to work near them. Since I became ill, I cannot afford to buy books any more. The library is invaluable to me. I used to go to the bookstore periodically to see what was new. Now, with the computer, best seller lists etc. I can find what I need and order it from libraries anywhere in the state and they will send it to my library for pick up. Using the computers at the library have also helped me to understand my illness. About all I can do now is read, and the libraries keep me supplied with books. – Author uses Kahuku public library.

This is a story of prayers answered and a minor miracle in which the public library played an important part. My 3 year old developed an ear infection and was scheduled to spend several days in the Kaiser Hospital, beside the Illikai. I was more concerned with his feelings of abandonment than with any medical procedure. What could a mother do to spare her child such a frightening experience? I did what most mother so when there is no apparent solutions. I prayed. The help came from an unexpected place –the library. While visiting my library, I noticed a new book displayed at the check out. It told how sick children in war-time London had to be accompanied to the hospital by a family member because of an acute shortage of nurses. London hospitals discovered an unanticipated side effect. Children accompanied by a family member recovered faster. Armed with the evidence supplied by the library book I got to stay in the hospital with my son for \$25 a night. Kaiser became the first hospital on Oahu to permit parents to stay in the hospital with their sick children...of course now the rate I \$90 a night! -- Author uses Liliha public library.

There are times in my life when the only medicine that would cheer me up is a trip to the library. I suffer with terrible depression. Sometimes I know why, most times I don't. Reading has strengthened, supported and comforted me. Weird, yeah? So anyway, the worth of the library to me is equal to sanity, freedom, getting-on-with-life. The librarians probably don't realize what a safe haven they are to me. ...There are times when they are light angels in my dark day. Many times I have walked out of the library, loaded with books, feeling the first hints of relief. Don't worry about me, I have my doctor, I take medicine, maybe someday I'll even get well. But in the meantime, I have my library to get me through. – Author is a self described single mother, poet, writer, dreamer who uses Pahoehoe and Hilo public libraries.

Genealogy

Everyone knows the library is a place to get books. But many people aren't aware of how vast and diverse their resources are. One of my favorite stories is how I helped my best friend locate his father, someone he had never met. ...the only thing I had to go on was a post office box address in Texas jotted down on a corner of an old envelope. I used telephone directories to...check nearby towns...Imagine my surprise when the first person I called was the right one! I continued to use the library to find out more about my friend's Hawaiian ancestors. We found that his great-great-grandmother arrived from the Azores in 1882, where they lived, the names of their family members, their occupations, and even whether or not they spoke English! – Author uses HSL

Services to Poor

I am 41 years old. I am married, disabled and pray and dream of someday being able to work. My husband and I are very poor and library books keep me going! My name is Taigna and I have lived here for 8 months. One thing I like about the library is that people here can pronounce my name! Boy, that never happened on the mainland. I have a disease that causes me to be largely bedridden for years. I truly love books on tape and I don't get out much except to get to the library to get them. The books on tape have been very important to me. I don't read much anymore due to my condition and they really improve my outlook rather than just 'laying in bed,' 'alone.' Having know family of my own I really appreciate this! -- Author uses McCully Public Library.

I am an unemployed female with medical problems living in a rural area. The library has been my lifeline. Living in a rural area with no electric, the library gives me access to the Internet to check on medical data and via e-mail to communicate with family and friends on the mainland. Without the Internet and the friendly library staff I would be totally isolated and out of communication for long periods of time. – Author uses Naalehu Public Library.

One time when we were so poor and my mother's sister was sick, my mother went to the library and checked out a book for her. This was because it was the nicest gift my mother

could think to give to her sister that was within our means. -- Author uses Makawao public library.

The library is worth a lot to me because my family doesn't have money to buy books all the time, that is why we go to the library and borrow books. The library is worth a lot to me because I think it is important to read with no restrictions. The library is worth a lot to me because you can learn things in the library that are important in life. That is why I think the library is worth a lot. Author is a self described 4th grader who uses Wailuku Public Library.

The day it occurred to me that the library was so much more than a book room was this past Christmas eve. It was that afternoon that I found myself at the computer terminal at the library hoping for some word from my brother from Canada. The library's Internet service enables me to have free long distance communication with a loved one. Author is a self described person of limited resources from Hilo Public Library

Money Saver

My seven year old daughter loves to read and would have put us in the poor hours if we had to purchase all the books she read from the library. – Author and daughter use Laupahoehoe public library.

I didn't realize how valuable HSPLS is to me until I lost my library card, without a library card, I was unable to borrow books, DVDs, CDs, videos, use the Internet, etc. The library allows me to save money.... Author is a self described frequent library user who uses Mililani Public Library.

The library's magazines are so varied that it would be beyond my means to duplicate a portion of them coming to my home separately. – Author uses Pahoehoe public library.

The library is worth a lot to me because my family doesn't have money to buy books all the time, that is why we go to the library and borrow books. The library is worth a lot to me because I think it is important to read with no restrictions. The library is worth a lot to me because you can learn things in the library that are important in life. That is why I think the library is worth a lot. Author is a self described 4th grader who uses Wailuku Public Library.

The library for me is a banquet for the mind;
A plentiful selection of food for thought and, it is free!
There is a 'free lunch,' it is the library. – Author is a self described vegan chef, author, and cable TV host (among other talents). He uses Pahoehoe public library.

I am a stay-at-home mom who has been doing reading for entertainment and craft projects at my children's school for the past eight years. The library has been invaluable in preparing for these projects. So you ask the worth of my library card to me? Our son is

in his last year of elementary school and I know this will be my last year of reading projects too. I have eight years of memories from this work, supported by library resources, that don't have a dollar value. These years have been one of those privileges that show that the best things in life (like a library card) are free. – Author uses Mililani public library.

I used to spend a lot of money on paperback books, magazine subscriptions, and other reading material. Now that I am more financially limited, I find all these materials at my disposal right here at the library. This access to me is a savings of time, money and stress. I am one library patron who is very grateful for this resource. Mahalo! –Author is a self described 20+ year resident of the west side of Maui who uses Lahaina public library.

The library is a good place to escape into a book, enjoy the daily paper and magazines. This place offers resources that we couldn't afford otherwise. – Author is a self described person who likes to read and who uses Lahaina public library.

While living abroad, we spent quite a bit of money on books from best sellers to children's school workbooks. Now we rarely buy books and rely on the library for the latest books and the classics. I know my library is responsible for not only my children reading more but I also read more too. You don't realize how valuable something is until you don't have access to it anymore. All of us in Hawaii are so fortunate to have such a great library system available to us for free. – Author uses Bond Memorial public library.

The public library is like a free book store that anyone can use. It helps me get good grades; it gives me something to do when I'm bored, and it is easy to use. – Author is a self described ten year old who home schools

Foreign Comparison

I'm over seventy and have lived in many foreign countries. I recommend the library, and especially Hawaii's library system in which books can be got from any other library in the state. Many other places are not as good as this. -- Author is a self described owner of a day lily nursery who uses Pahoehoe public library.

I take foreign exchange students to the library to show them what is available. They are impressed by this demonstration of "freedom in action." – Author uses Lahaina public library.

Even though I am originally from Hawaii, I never really appreciated the Hawaii public libraries until I lived in the Bahamas for eight years. There were few public libraries in the Bahamas and they were in old, falling apart buildings with horrible, old, musty, collections of books. No one used it. When we returned to Hawaii we started going to the library on a regular basis. We don't have TV reception in our house so the library is a big source of entertainment. – Author uses Bond Memorial public library.

While living abroad, we spent quite a bit of money on books from best sellers to children's school workbooks. Now we rarely buy books and rely on the library for the latest books and the classics. I know my library is responsible for not only my children reading more but I also read more too. You don't realize how valuable something is until you don't have access to it anymore. All of us in Hawaii are so fortunate to have such a great library system available to us for free. – Author uses Bond Memorial public library.

Additional Sources of Income – Collection Building

About 7 or 8 years ago, I started a program where men (specifically) from the Rotary Club came into the K, 1 and 2 grade classrooms to read to the kids each week. As I was picking books to read, it occurred to me that the Club might be able to donate funds to the library to purchase more of the kind of books that were age-appropriate for these grades. By now, I'm guessing that the Club has purchased something like 200 books to add to the library's collection with the assistance of the library's staff. – Author is a self described realtor, avid reader, grandparent, library Friend from Koloa Public Library

Appendix I-12 Use of Report Data: Board of Education

March 5, 2003

To: Virginia Lowell, Hawaii State Librarian

From: Joe Ryan, President, Ryan Information Management

Re: The Value and Impact of Hawaii Public Libraries Study – Results to Date

You asked me to briefly summarize the results of the work to date from the Economic Impact of the Hawaii State Public Library System (HSPLS) on the Business and Tourism Industries of Hawaii project. The study found that HSPLS pumps more than \$20 million directly to the economy of Hawaii, provides over \$280 million in market equivalent services, saves the individual \$218 and saves the average family \$747 a year. That is a return to the Hawaii taxpayers of over \$13 for every tax dollar invested. The study also concluded however, that HSPLS was seriously under funded in the range of \$7 to \$12 million annually when compared to peers or national norms. For a shorter summary than one follows see the attached press release.

The study findings lead to two paradoxical conclusions. On the one hand, Hawaii public libraries are a great value for citizens and families. Citizens have figured this out and Hawaii public libraries are heavily used compared to their peers nationally. On the other hand, by any peer measure, HSPLS is significantly under funded. The results of lower than peer funding does not show up in the delivery of library services. HSPLS management and staff deliver of services on par with HSPLS' peers anywhere. The lack of funds shows up in fewer staff, not as well paid; less investment annually in collections and in information technology than HSPLS peers. Clearly, the use and value of Hawaii public libraries is out of step with their funding. HSPLS delivers good service to Hawaii citizens, given what it has to work with in terms of lower than normal investment in staff, collections and technology. The study's principal findings are highlighted next.

HSPLS Has a Substantial Business Presence in Hawaii

HSPLS pumps more than \$20 million directly into the economy of Hawaii annually in wages and salaries, building repair and maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, and fee based services.

HSPLS would generate \$282 million in business annually if HSPLS users had to pay commercial rates for HSPLS' top six most heavily used services (using 2000 data). If that business was thought of as "sales," HSPLS would be on *Hawaii Business's* annual "Top 250 companies in Hawaii" list.

HSPLS Delivers Significant Value to Citizens and the Families of Hawaii

HSPLS returns over \$13 for every tax dollar invested. HSPLS saves the average family in Hawaii, already stretched by a higher than average cost of living, over \$500 annually in use of library services and resources (using 2000 data). That is not bad for an average per person tax contribution of \$19.10 annually, not even the cost of a hardback book!

Library Activity	Market Rate	2000 Use	2000 Market Value
Admissions (Walk in Patrons)	\$3.75	6,164,912	\$23,118,420.00
Materials Use	\$27.92	6,759,957	\$188,722,451.54
In Library Material Use	\$13.96	4,333,368	\$60,488,833.91
Hours of Reference Service	\$50.00/hr	133,510	\$6,675,500.00
Hours of Internet Workstation Use	\$12.00	120,016	\$1,440,192.00
Library Programs Attendance	\$5.00	262,188	\$1,310,940.00
Annual Total Market Value:			\$281,756,337.45
Annual State & Federal Tax Income:			\$21,158,335
Total Annual HSPLS Income:			\$22,754,047
Hawaii Population Served:			1,193,001
Return on Investment per \$1 Taxed:			\$13.32
Annual Savings for Individual:			\$218.44
Annual Savings for Average Family:			\$747.06

HSPLS Provides Library Services on Par with Peer Libraries and National Norms

The comparative data clearly indicate that HSPLS delivers quality services, on a par with its peers, to Hawaii citizens despite being significantly under-funded. HSPLS serves 47% more patrons on average than its peer library systems and serves more people than those that visit their own libraries nationally, and in peer states, and in the best library systems. HSPLS maintains twice as many branches on average and is open 37% more hours overall annually than its peer library systems. The use of materials and reference services is on par with peer systems and states and the national norms. HSPLS' materials use is 18% more on average than its peer library systems.

HSPLS Infrastructure Support Weak Compared to Peers

HSPLS cannot sustain its highly valued public face, if its internal infrastructure is eroding, in particular investment in staff, collections, and information technology. The diagnostic evidence from the peer comparisons suggest underlying weakness in key infrastructure areas:

- **Hours:** While open more hours, the average, peer system branches are open 600 hours annually or 11.5 hours per week more than HSPLS branches.
- **Staff:** HSPLS spends less on staff per capita (\$13.84) than either peer systems (\$14.02) or the best library systems (\$28.95) – \$2,637,314 a year less than HSPLS peers.

- **Collections:** Peer states spend twice as much annually per capita on average on collections than HSPLS does – or \$2,228,719 a year more. In 2000, libraries nationally spend twice as much as HSPLS does on videos.
- **Information technology:** As one indicator, nationally libraries are spending twice as much on Internet workstations and peer libraries three times as much or \$2,637,314 per year more compared to peer states.

Perhaps this discussion may be crystallized by posing the following question: In Hawaii, its public libraries are heavily used, but are users finding what they want? At the best libraries nationally, people on average visit their libraries less but leave with twice as many materials (books, videos, DVDs, etc.) as our HSPLS users do. At the best library systems nationally, users find more of what they need than they do at HSPLS because there are more staff to serve, better quality reference and general collections, and more information technology in support.

HSPLS is poorly supported compared to its peer libraries or to national norms

The evident weakness in HSPLS infrastructure is directly due to ongoing under funding. The data make it clear that HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to achieve support comparable to peer and national norms. That is HSPLS needs each resident of Hawaii to pay \$6 more a year than they do now to have comparable support to its peer library systems – an increase of less than the price of a paperback book. For \$10 per citizen, HSPLS could be on par with national norms for library expenditures. These data are summarized in Table I-2. The state Department of Education funds budgeted for HSPLS in fiscal 2000 were 1.95% of the total DOE appropriation. To have comparable support to peer systems, an additional 0.57% of DOE total appropriations would need to be reallocated to HSPLS. To have comparable support to national norms 1% of DOE total appropriations would need to be reallocated to HSPLS.

Area of Comparison	Hawaii	National Norm	Peer States	Peer Systems	Best Libraries
Total Income per Capita	\$19.10	\$28.96	\$25.67	\$24.72	\$52.44
Annual Amount to Catch Up		\$11,760,149	\$7,830,404	\$6,701,433	\$39,775,854
Collection Expenses per Capita	\$1.77	\$4.02	\$3.64	\$3.25	\$8.62
Annual Amount to Catch Up		\$2,682,059	\$2,228,719	\$1,765,617	\$8,169,864
Staff Expenses per Capita	\$13.84	\$16.96	\$16.05	\$14.02	\$28.95
Annual Amount to Catch Up		\$3,727,717	\$2,637,314	\$220,328	\$18,036,975
Public Internet Terminals per 5,000 Population	0.8	1.9	2.50	1.11	2.23
Amount to Catch Up		\$3,727,717	\$2,637,314	\$220,328	\$18,036,975

Study Conclusions

We conclude that HSPLS is a small, efficient, successful state government agency delivering a high return on taxpayer investment to the citizens and families of Hawaii that is significantly under funded. The study's data analysis confirms our initial assessment that HSPLS is a good library system seeking to become better. A significant component in the improvement effort must be to reduce the \$7 to \$12 million annual shortfall in revenue when compared to peer systems. Already, libraries nationally spend twice what HSPLS does on videos or on Internet workstations, peer libraries three times as much. At the best libraries nationally, users find more of what they need than at HSPLS because there are more staff to serve, better quality reference and general collections, and more information technology.

Next Steps

HSPLS has concluded that it is probably unwise to be so dependent on state funding. As you have frequently said, "We must face the reality that we can no longer conduct business as usual." State revenue is flat or declining. Operational costs continue to increase and HSPLS is already under funded \$7-\$12 million annually when compared to its peers. So you have directed us to focus the study team's efforts on identifying and evaluating additional sources of revenue and strengthening those existing additional HSPLS already employs such as the Friends and Foundation. We look forward to working with you during the next phase of the project on providing you with the necessary evidence to effectively obtain the additional sources of revenue you need. A significant part of that challenge will be to help key internal and external stakeholders imagine the value HSPLS could provide to Hawaii if properly supported.

(Also included was a copy of the press release, see Appendix I-10.)

Appendix I-13 Use of Report Data: Press Release March 5, 2003

THE VALUE AND IMPACT OF HAWAII PUBLIC LIBRARIES*

An economic impact study of Hawaii State Public Library System (HSPLS) found it seriously under funded by state government yet still delivering \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, and saving the average person \$218 and the average Hawaii family \$747 a year. That is a return to the Hawaii taxpayers of over \$13 for every tax dollar invested. HSPLS asked Ryan Information Management, a U.S. national library management consulting firm, to examine HSPLS' economic worth as part of a larger study. Virginia Lowell, the Hawaii State Librarian, commenting on the study noted that, "The perception that public libraries are for kids needs to be re-examined. In fact, 57% of HSPLS' materials use is by adults. It is time to take an adult look at the business of providing library services to the residents of Hawaii and the system's economic value." The study found that:

- HSPLS is a substantial business presence in Hawaii: HSPLS pumps \$20 million directly into the economy of Hawaii annually in wages and salaries, building repair and maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, and fee based services. HSPLS would generate \$282 million in business annually if HSPLS users had to pay commercial rates for HSPLS' top six most heavily used services (using 2000 data). If that business was thought of as "sales," HSPLS would be on *Hawaii Business's* annual "Top 250 companies in Hawaii" list.
- HSPLS delivers significant value to citizens and families: HSPLS returns over \$13 for every tax dollar invested. HSPLS saves the average person \$218 and the average family in Hawaii \$747 annually in use of library services and resources (using 2000 data) – not bad for an average per person tax of \$17.74 annually.
- HSPLS is poorly supported compared to its peer libraries or to national norms: HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to match its peers and to national norms. That is HSPLS needs each resident of Hawaii to pay \$6 more a year than they do now to have comparable support to its peer library systems – an increase of less than the price of a paperback book. For \$10 per citizen, HSPLS could be on par with national norms for library expenditures.

The study concluded, "HSPLS is a small, efficient, successful state government agency delivering a high return on taxpayer investment to the citizens and families of Hawaii that is significantly under funded. Already, libraries nationally spend twice what HSPLS does on videos or on Internet workstations; peer libraries three times as much. At the best libraries nationally, users find more of what they need than at HSPLS because there are more staff to serve, better quality and more up to date reference and general collections, and more information technology. Imagine the value HSPLS could provide to Hawaii if properly supported."

* Additional project information may be obtained from Craig Nosee <craig@lib.state.hi.us> HSPLS Administrative Assistant & Project Liaison, Hawaii State Public Library System 465 S. King Street Honolulu, HI 96813 Phone: (808) 586-3698 Fax: (808) 586-3715.

Appendix I-14 Use of Report Data: Branch Managers

March 5, 2003

TO: HSPLS Branch Managers and Staff

FROM: Joe Ryan, Ryan Information Management

RE: The Value and Impact of Hawaii Public Libraries Study

I would like to brief you on the results of the first phase of the study we have been conducting to provide evidence for what many of you already knew – how valuable HSPLS is to Hawaii citizens and taxpayers.

Let me say first, **Mahalo, Mahalo** for all your help! I needed to quickly grasp the services you provide here and their unique context. I needed to quickly assemble the data needed to better make your case with key stakeholders and funders.

Second, let me say that I am sorry that I am not briefing you face-to-face. I had hoped to brief you during this month's branch managers meetings. But the meetings had to be canceled. I look forward to talking over the results of this study with you in person in the future as opportunity permits.

Attached is the report's "one pager" that summarizes the study. The full report is available by contacting Craig Nosee. Here are some quick highlights. Did you know:

- 57% of HSPLS' material use is by adults, not children, not young adults. Libraries are not just places for kids. That is true in Hawaii and around the country too.
- HSPLS returned over \$13 for every one invested by Hawaii state taxpayers.
- HSPLS saved the average individual \$218 annually in library services.
- HSPLS saved the average Hawaii family \$747 a year in library services.
- HSPLS pumped \$20 million a year directly into the Hawaii economy.
- HSPLS would have generated \$282 million in "sales" if people had to pay commercial rates for the top six library services offered. HSPLS would easily make *Hawaii Business's* annual "Top 250 companies in Hawaii" list with those sales figures.
- HSPLS delivers library services on a par with its peer systems and national norms. It is a myth that the delivery of library services in Hawaii is somehow inferior to the mainland (or elsewhere).
- Where HSPLS is weak is in the quality of our infrastructure: not enough staff, not paid enough, not enough invested in collections or information technology. This is because,

- HSPLS is significantly under funded when compared to its peers or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to have comparable support to its peers and to national norms. That means each person contributes the equivalent of the price of a paperback book in new taxes per year for a total annual contribution of the price of one good hardback best seller.

HSPLS libraries are a deal for taxpayers and families any way you view it. We hope you will share this information (use the attached one pager) with your users, your community (though local media outlets) and with your elected officials. I have watched while the folks at headquarters work hard to make the case with the legislature and governor. But there is no substitute for the same message being delivered at home by home folks. The theme: Hawaii public libraries are a great value. Imagine what they could do for the community if properly funded!

At its root, we need to begin to change the (non library using) public's image of what Hawaii libraries are really about and what we really do. Remember, most non-users image of the library is shaped by their memories of it from when they were kieiki. A significant number of Hawaii's population did not have libraries where they lived (someplace else in the world) when they were kids. This is true in many local communities. But this view is also prevalent among the decision makers who make funding and other key decisions.

Having talked with a good cross-section of Hawaii's key leaders in government and out, I can tell you these folks are eager to learn more about libraries in Hawaii in order to make better decisions. We need to stop talking among ourselves and even with our library users and continue to find new ways to simply explain to the rest of the community why libraries and librarians are important and their impact on Hawaii. With your help on this project, we have made a good start. If this briefing makes you think of other ways we might present our case, I would like to hear your thoughts.

The State Librarian has concluded that it is probably unwise to be so dependent on state funding, "We must face the reality that we can no longer conduct business as usual." State revenue is flat or declining. Operational costs continue to increase and HSPLS is already under funded \$7-\$12 million annually when compared to its peers. So the study team has been directed to focus its efforts on identifying and evaluating additional sources of sustained, recurring, revenue and strengthening those existing additional HSPLS already employs such as the Friends and Foundation. We look forward to working with you during the next phase of the project to identify and evaluate additional sources of sustained, recurring, funding. These efforts appear the only ones to take if we hope to reverse the trend of flat or declining revenues to do an increasingly costly job.

Aloha and Mahalo!
Joe Ryan

(Also included was a copy of the press release, see Appendix I-10.)

Appendix I-15 Use of Report Data: Library Friends and Foundation

March 5, 2003

TO: HSPLS Library Friends and Library Foundation

FROM: Joe Ryan, Ryan Information Management

RE: The Value and Impact of Hawaii Public Libraries Study

I would like to brief you on the results of the first phase of the study we have been conducting to provide evidence for what we who work in libraries all know – how valuable HSPLS is to Hawaii citizens and taxpayers. Your help has been invaluable in this effort. I think you may find the results useful when working with reluctant potential donors and to increase your membership. You may also find it useful to bring to the attention of local opinion leaders, elected officials, and the media in your community. The theme: Hawaii public libraries are a great value. Imagine what they could do for the community if properly funded!

At its root, we need to begin to change the (non library using) public's image of what Hawaii libraries are really about and what they really do. Remember, most non-users image of the library is shaped by their memories of it from when they were kieiki. A significant number of Hawaii's population did not have libraries where they lived (someplace else in the world) when they were kids. This is true in your community. But it is also true among the decision makers who make funding and other key decisions. Having talked with a good cross-section of Hawaii's key leaders in government and out, I can tell you these folks are eager to learn what they often recognize they don't know in order to make better decisions. We need to stop talking among ourselves and even with our library users and continue to find new ways to simply explain to the rest of the community why we matter as libraries, as librarians and library supporters. With your essential help, I think we have made a good start. If this briefing makes you think of other ways we might present our case, I would like to hear your thoughts.

Attached is the report's one page summary of the study. Here are some quick highlights. Did you know:

- 57% of HSPLS' material use is by adults, not children, not young adults. Libraries are not just places for kids. That is true in Hawaii and around the country too.
- HSPLS returned over \$13 for every one invested by Hawaii state taxpayers.
- HSPLS saved the average individual \$218 annually in library services.
- HSPLS saved the average Hawaii family \$747 a year in services.
- HSPLS pumped \$20 million a year directly into the Hawaii economy.
- HSPLS would have generated \$282 million in "sales" if people had to pay commercial rates for the top six library services offered. HSPLS would easily

make *Hawaii Business's* annual "Top 250 companies in Hawaii" list with those sales figures.

- HSPLS delivers library services on a par with its peer systems and national norms. It is a myth that the delivery of library services in Hawaii is somehow inferior to the mainland (or elsewhere).
- Where HSPLS is weak is in the quality of our infrastructure: not enough staff, not paid enough, not enough invested in collections or information technology. This is because,
- HSPLS is significantly under funded when compared to its peers or national norms. HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to have comparable support to its peers and to national norms. That means each person would need to contribute the equivalent of the price of a paperback book in new taxes per year for a total annual contribution of the price of one good hardback best seller.

HSPLS libraries are a deal for taxpayers and families any way you view it. We hope you will share this information with your community (use the attached one pager). I have watched while the folks at headquarters work hard to make the case with the legislature and governor. But there is no substitute for the same message being delivered at home by home folks. The theme: Hawaii public libraries are a great value. Imagine what they could do for the community if properly funded!

Soon, the study team will send you a digest of the results of the Talk Story contest sponsored by the Friends. We believe you find these library users remarks a big morale boost and of great help in your work with potential donors.

Next Steps

HSPLS has concluded, particularly with the latest budget cuts, that it is unwise to be so dependent on state funding. The State Librarian has frequently remarked, "We must face the reality that we can no longer conduct business as usual." State revenue is flat or declining. Operational costs continue to increase and HSPLS is already under funded \$7-\$12 million annually when compared to its peers. So the project team has been directed to focus the study team's efforts on identifying and evaluating additional sources of revenue and strengthening those existing alternatives, such as the Friends and Foundation, where possible. As the State Librarian recently commented, "Both the Foundation and the Friends, big and small, have always been an essential and integral part of HSPLS. In the present economic circumstance, the value of these organizations to HSPLS and Hawaii citizens will only increase in importance." We look forward to working with you during the next phase of the project. In particular, we would like to call your attention to the visit of Dr. Charles R. McClure on February 11-12, 2003. Chuck has broad experience around the country working with library support groups to fine tune their operations. A significant part of that challenge will be to help key stakeholders imagine the value HSPLS could provide to Hawaii if properly supported

Aloha and Mahalo! Joe Ryan

(Also included was a copy of the press release, see Appendix I-10.)

PHASE II REPORT: APPENDICES

Appendix II-1 Selected Peer Library Additional Revenue Source Questions

Friends

Please describe the physical facilities of the Friends Offices?

What is the overall operating budget for the Friends, describe its organizational structure, and what is the ratio of operating expenditures to income?

Please describe the type of individuals who are on the governing board of the Friends?

What events/activities, other than book sales, do you hold on a recurring basis each year? What revenue is generated, on average, for each event/activity?

What role does the Friends and the library administration play in deciding how money collected is spent (beyond Friends operating)? How are your decisions in this (and other areas) coordinated with the library administration?

What communications regularly take place between the Friends and library administration?

How do you distinguish what you do from the Foundation (if it exists in your setting)?

What role does the Friend play in advocacy/marketing the library? What is particularly effective (if you do play a role)? How do you work within the non profit status restrictions?

Do you run your own Friend's web site, how is it managed, and are you satisfied with its content?

Foundation

Pretend I am a donor, what options do I have to give to the library? Are there written explanations/handouts/forms developed for each (and can I obtain copies of each)?

Describe the physical facilities of the Foundations Offices?

What is the overall operating budget for the Foundation, describe its organizational structure, and what is the ratio of operating expenditures to income?

Describe the type of individuals who are on the governing board of the Foundation?

What have been your most effective mechanism(s) for gaining donations?

Do you sponsor regular events throughout the year?

If so, What are these events? What revenue, on average, is generated (after expenses)? How much of that goes to endowments? How do you distinguish what you do from the Friends (if they exist in your setting)?

If not, Do you have a problem with visibility, image, donors know what you do? If so, how do you overcome this?

Do you run your own Foundation web site, how is it managed, and are you satisfied with its content?

Library Foundation

Does the library itself have its own foundation? If so, for what purpose? If there is also a separate external Foundation solely devoted to the Library (but not managed by it), how do you distinguish between roles?

What problems or issues need to be addressed related to this source of revenue?

Individual Donations

Do you actively solicit individual donations?

How (written material, sign, web)?

Are special approaches used (pet memorial, in honor of book)? Can you estimate the annual revenue derived from each? How is the money spent for each?

How many staff with what position in the library have responsibility for these activities?

What problems or issues need to be addressed related to this source of revenue?

Corporate Giving

What sustained or multi-year partnerships or sponsors from the private sector do you have?

Briefly describe each, how was each established and estimate the revenue derived from each?

How do these activities relate to efforts by the Friends or the Foundation?

What problems or issues need to be addressed related to this source of revenue?

Federal Government Funds

What Federal funds do you receive beyond LSTA and e-rate?

If you did apply for e-rate discounts, was it worth the effort and will you continue to apply? Do you have library staff dedicated to obtaining e-rate funding? Do you work with the state library to obtain these funds? Do you work with other sources to obtain these funds? Can you estimate how much did you obtain from this source last year?

Do you have staff designated to monitor Federal funding opportunities and apply for them? If so, how many staff? What role does this source of revenue play in library finance strategically?

What is your relationship with your Representative and Senators (and how is it nurtured)?

Support from Government Agencies

Do you receive any sustained, multi-year, revenue, or in kind support, from local (not including your main tax revenue funds) or state (not including state library controlled) government agencies?

If so, what are they? How are these funds obtained?

Who or what position in the library coordinates these efforts?

Can you estimate the annual revenue obtained from each source?

What problems or issues need to be addressed related to this source of revenue?

Local Intergovernmental Support

What intergovernmental support do you receive from local governments? For example, the county supplies telecommunications.

If you receive support from this source, is it:

- Cash (figured as part of your annual appropriation),
- Received because you are a member of local government (figured as part of the local government's infrastructure budget not the library's),
- A transfer of funds (agency transfers a portion of its funds to the library in return for the library performing some activity),
- In kind (a government agency does something specific for the library and the library does something specific for the agency or the general good) or,
- Some other arrangement (please explain)?

In each relevant instance, could you estimate the amount of revenue (or service) provided?

What problems or issues need to be addressed related to this source of revenue? What control or influence does the library have?

Impact Fees

Does your library benefit from impact fees? Can you briefly describe how they work in your area? Can I get a copy of any written legislation, regulation or agreement? Can you estimate how much annual revenue the library obtains from impact fees? What problems or issues need to be addressed related to this source of revenue?

National/Local Foundation Grants & Giving

Do you have any relationships with national or local foundations that provide you with resources that are sustained or multi-year?

If so, what are they, how were they established/maintained, can you estimate the annual revenue generated?

What staff are devoted to obtaining these funds?

Do you actively seek grants that are one time from these sources? What is the strategic purpose of these grants?

What problems or issues need to be addressed related to this source of revenue?

Non Profit Partnerships & Revenue

What sustained or multi-year partnerships with the not-for-profit sector [like schools, social agencies, etc.] do you have?

Briefly describe each, how was each established and estimate the annual revenue derived from each?

Is there someone at the library to monitor and coordinate these activities?

What problems or issues need to be addressed related to this source of revenue?

Enhanced Services from Profit Centers

Includes all types of library efforts to generate revenue itself through profit centers. What problems or issues need to be addressed related to this source of revenue?

Contract Services

Do you obtain revenue from contract services? If so, how and what is the estimated annual revenue? What problems or issues need to be addressed related to this source of revenue?

Rentals

(Note: HSPLS collects the most rental fees among the peer libraries.) Do you obtain revenue from rentals? If so, how and what is the estimated annual revenue? What problems or issues need to be addressed related to this source of revenue?

Commission

Do you obtain revenue from commission? If so, how and what is the estimated annual revenue? What problems or issues need to be addressed related to this source of revenue?

Vending

Do you obtain revenue from vending, for example, with an established beverage vendor, food vendor? If so, how and what is the estimated annual revenue? What problems or issues need to be addressed related to this source of revenue?

Interest & Investment Income

Briefly summarize how you manage interest and investment income and how much revenue does this activity generate annually? What problems or issues need to be addressed related to this source of revenue?

Retail Operations & Store

Do you offer a retail operation or store? If so, who runs this operation?

What do you offer for sale and what products or items are the best money makers?

How do you obtain product?

How much after expenses revenue does this activity generate annually? How is the revenue from this activity spent?

What problems or issues need to be addressed related to this source of revenue?

Other Products & Services

What products and services do you offer (e.g., copy, fax, scanning services, printer paper fee, etc.)?

How much after expenses revenue does each generate annually?

How is money collected (are smart cards used)?

What problems or issues need to be addressed related to this source of revenue?

Other Sources of Revenue Not Mentioned

What did I miss? How much after expenses revenue does each generate annually? What problems or issues need to be addressed related to this source of revenue?

Planning & Administration

What planning is done regarding these services beyond annual accounting? For example, is there a strategic plan identifying each revenue source, predicting future income, and systematically targeting each revenue source for specific library purposes?

Have you or your staff received specific training regarding obtaining additional funds for library services? If yes, what training have you or your staff received?

If your library is part of a larger system or city/county organization do you have to coordinate your efforts at obtaining additional funding with them or others?

What problems or issues need to be addressed related to this source of revenue?

Budgeting for Large Expenses

How does the system budget for large expenses such as automated system upgrades and large information technology expenses? Have special financial or legal arrangements been necessary to make your approach possible?

Appendix II-2 Key Hawaii Additional Revenue Decision Makers Interview Script

Introduction

The Hawaii State Public Library System (HSPLS) is a good public library system seeking to be better and we would like your help and advice on ways to obtain the additional sustained revenue necessary to make a good system great particularly in the following areas depending on your expertise: (a) state government taxation (b) local government taxation to support libraries (c) federal sources of revenue for the system (d) local intergovernmental transfers (e) individual donation (f) corporate giving or (g) enhanced, profit making services HSPLS might offer. The emphasis is on sustainable revenue that the system can count on year after year, rather than one time money, say from a grant. We expect this session to last no more than 45 minutes to an hour:

- First, I'd like to review with you some recent findings that provide an overview of how well the system is doing and its return on taxpayer and family investment.
- Second, I'd like to narrow in on the type of annual financing the system needs to be competitive with peer and national norms.
- Then, I'd like to focus on some of the potential additional sources of revenue that the system might tap and get your views on such things as the feasibility, likely amount of annual revenue, best approaches or strategies to take, etc.
- Last, I promise to allow you time to complete the one page questionnaire I am passing out that seeks to capture a summary of your views and provide space for things you didn't get a chance to say during the conversation.

We intend to draw on your knowledge and informed opinion and not ask you to comment in areas where you have no experience. You do not have to answer any of the questions we ask and we can stop at any time. We would like to thank you for participating in this meeting today.

The Good News

Hawaii State Public Library System (HSPLS) is a good library system contributing significant economic value to the taxpayers and families of Hawaii concluded a study commissioned by HSPLS done by Ryan Information Management, a U.S. national library management consulting firm. The study, reporting at the beginning of the year, found that HSPLS pumps \$20 million directly to the economy of Hawaii, providing over \$280 million in market equivalent services, and saving the average Hawaii family over \$500 a year. Virginia Lowell, the Hawaii State Librarian, commenting on the study noted that, "Just as 57% of HSPLS' materials use is by adults (not kids), it is time to take an adult look at the business of providing library services to the residents of Hawaii and the system's economic value." The study found that:

- HSPLS is a substantial business presence in Hawaii: HSPLS pumps \$20 million directly into the economy of Hawaii annually in wages and salaries, building repair and maintenance, security services, travel, postage, telecommunications, electricity, refuse service, equipment rental, and fee based services. HSPLS would generate \$282 million in business annually if HSPLS users had to pay commercial rates for HSPLS'

top six most heavily used services (using 2000 data). If that business was thought of as “sales,” HSPLS would be on *Hawaii Business’s* annual “Top 250 companies in Hawaii” list. HSPLS delivers significant value to citizens and families: HSPLS returns over \$13 for every tax dollar invested.

- HSPLS saves the average family in Hawaii, already stretched by a higher than average cost of living, over \$500 annually in use of library services and resources (using 2000 data) – not bad for an average per person tax of \$19.10 annually, not even the cost of a hardback book.

The study concluded: “HSPLS is a small, efficient, successful state government agency delivering a high return on taxpayer investment to the citizens and families of Hawaii that is significantly under funded.”

The Challenge

A principal driver in the current economy is accurate, timely, information and a workforce capable of making use of that information and who can use the various information technologies necessary to manipulate it. The first place people seeking information turn to in Hawaii is their public libraries. If governments are interested in priming the economic development pump, particularly among small businesses and the workforce, ensuring the ready availability of high quality information, the presence of local expertise in obtaining and using that information and training workforce in how to obtain and manage information needs to be addressed. The public library is a local institution structurally designed to address this aspect of the economic development stimulus package. Remember, in 2000, HSPLS’ top services provided over \$282 million in economic development stimulus in 50 locations throughout Hawaii. Yet clearly as the Hawaii economy limps along year after recent year, that stimulus is not enough, particularly given Hawaii’s geographic isolation.

Information resources have to be better in Hawaii because unlike the mainland, if your library system doesn’t have it, it is a long swim to obtain what you need. Hawaii library staff need to be better trained, because if they don’t know, they can’t find out from their nearby neighboring peers. Hawaii public library information technology has to be the best because it is the only known way to efficiently move information from one remote location to another rapidly to make up for the isolation.

With this in mind, the State Librarian commissioned a study to compare HSPLS to its peers and to national norms. The study reported at the beginning of this year that “HSPLS is poorly supported compared to its peer libraries or to national norms. The gap between the Hawaii system and peer and national norms was specifically identified: “HSPLS needs an *annual* sustained increase in revenue of \$7-\$12 million to have comparable support to its peers and to national norms. That is HSPLS needs each resident of Hawaii to pay \$6 more a year than they do now to have comparable support to its peer library systems – an increase of less than the price of a paperback book. For \$10 per citizen, HSPLS could be on par with national norms for library expenditures.”

The study went on to note that the use of Hawaii libraries is among the highest anywhere and that the delivery of services is as good as peer and national norms. Service and use are not the problems. But the library's collection, staff, and information technology, key elements needed in isolated Hawaii, were all under funded. On average *annually*, the HSPLS is:

- The collection is under funded by \$1.8 million compared to peers and \$2.7 million under funded compared to national norms,
- Staffing is under funded by \$3.7 million compared to national norms. This is in the context of HSPLS maintaining *twice* the number of branches on average as peer library systems.
- Internet workstations, only one component of the information technology infrastructure, are under funded by \$1.3 million compared to peers and under funded by \$2.3 million compared to national norms.

The study noted that “already, libraries nationally spend twice what HSPLS does on videos or on Internet workstations, peer libraries three times as much. At the best libraries nationally, users find more of what they need than at HSPLS because there are more staff to serve, better quality reference and general collections, and more information technology. Imagine the value HSPLS could provide to Hawaii if properly supported.”

The challenge then is how to make up the \$7-\$12 million in annual revenue short fall. The state provides enough revenue to sustain an adequate library system with good delivery of library services that is highly used. But that is insufficient to meet the current Hawaii economic development needs or match peer or national norms. As the State Librarian notes, "...with additional cuts being planned or discussed (at the state level), and with an even higher percentage of our general fund going to salaries, we know we can no longer conduct business as usual and that we must embark on a different path to accomplish our mission.¹³⁵"

Seeking Additional Sources of Revenue

Most public library systems, including HSPLS, make use of a number of sources of revenue. Sources being investigated for this study include:

- **Library support organizations:** What is the current role and future potential of the library Foundation and Friends? What suggestions can the study team offer to the Foundation and Friends management based on experience with other Library support organizations throughout the U.S.?
- **Federal state or local government tax assessment alternatives:** What are additional federal, state and local government tax assessment mechanisms used by other libraries in the U.S. that HSPLS might consider?
- **Intergovernmental revenue or in kind transfer:** What in kind support do other public libraries receive from their county and local governments?

¹³⁵ (2003, January 21). Funds for Kapolei library sought. *Honolulu Star Bulletin*. <<http://starbulletin.com/2003/01/21/news/story4.html>>

- **HSPLS enhanced services or retail operations:** Are there enhanced services or retail activities used by other public libraries in the U.S. that HSPLS should consider?
- **Corporate support:** What has been peer library experience been with raising sustained support from corporate sources?

In Hawaii for fiscal 2000, 87.6% of public library funding came from state appropriation, 3.6% from federal funds and nothing from local governments. This revenue split is not the case for most public libraries in the U.S. – most funding comes from local rather than state sources. “About 80 percent of funding for the nation's nearly 15,000 public libraries comes from local taxes. About 20 percent comes from state funding and less than 1 percent from federal tax dollars.”¹³⁶

Basic Questions

The same basic questions will be addressed to each group's revenue area of expertise. The interviewer will typically begin with a statement of the revenue presently (2000) being generated in Hawaii and present the group with a peer and maximum revenue amount earned by peer libraries in the focus area (if an example exists).

What sustainable additional sources of revenue would you recommend that HSPLS investigate based on your experience? Why?

How much annual revenue do you believe is possible to obtain from this source?

What is the feasibility of HSPLS using each revenue source suggested? Are there issues and barriers preventing HSPLS from using each revenue sources?

What steps does HSPLS have to take to increase the likelihood of obtaining this revenue?

In addition, there may be specific follow on questions in each subject area based on the e-mail and phone interviews conducted with peer library managers.

Wrap Up

The interviewer will allow time for the participants to complete the questionnaire (see below). He will briefly summarize the discussion and thank the participants for their insights and time.

¹³⁶ American Library Association. (2003) Renaissance in public libraries. <<http://www.ala.org/pio/factsheets/renaissance.html>>.

Appendix II-3 HSPLS Additional Revenue Source Interviewee Questionnaire

Despite returning \$13 for every state tax dollar invested in Hawaii’s public libraries, a savings of over \$500 annually for the average family in Hawaii, Hawaii’s public libraries are under funded by \$7 to \$12 million annually when compared to peer and U.S. norms. Help HSPLS improve library services by finding additional sources of revenue by filling out this questionnaire.

- 1) Name: _____ 2) Phone: _____ 3) E-mail: _____
 4) Agency/Organization/Business: _____ Title: _____
 4) Address: _____

5) What new sources of revenue should HSPLS pursue?	6) Estimate annual revenue?	7) How feasible is it for HPLS to use the source? Issues?	8) Key actions HSPLS should take now?
	\$		
	\$		
	\$		
	\$		

9) Additional Comments:

Appendix II-4 Peer Library Additional Revenue Data from PLDS (2001)

Library Name:	HSPLS	San Diego, CA	San Diego County, CA	Denver County, CO	Broward County, FL	Tampa FL	Miami-Dade, FL	Palm Beach, FL
Street Address:	465 South King Street, Room B1 Honolulu, HI 96813-2909	820 E Street San Diego, CA 92101-6478	5555 Overland Building 15 San Diego, CA 92123-1296	10 W 14th Avenue Parkway Denver, CO 80204-2731	100 S. Andrews Avenue Fort Lauderdale, FL 33301-1826	900 North Ashley Drive Tampa, FL 33602-3788	101 West Flagler Street Miami, FL 33130-1523	3650 Summit Blvd. West Palm Beach, FL 33406-4198
Director	Virginia Lowell	Anna Tatar	Marilyn C. Crouch	Rick Ashton	Samuel F. Morrison	Joe R. Stines	Raymond Santiago	Jerry W. Brownlee
Contact	Betty Kingery	Dianne Parham		Dave Smith	Eileen McNally	Jackie Zebos	Sheila Berke	Kathy Boyes
Telephone Number:	(808)586-3705	(619)236-5830	(858)694-2414	(720)865-1111	(954)357-7444	(813)273-3660	(305)375-5501	(561)233-2600
Web page:	http://www.hcc.hawaii.edu/hspls	http://www.sdcl.org/	http://www.sdcl.org/	http://www.denver.lib.co.us/	http://www.broward.org/library/	http://www.thpl.org/	http://www.mdpls.org/	http://www.pbclibrary.org/
LSTA	\$861,635	\$25,000	\$24,537	\$0	\$250,000	\$101,326	\$62,051	\$117,195
E-rate	\$90,153	\$0	\$45,118	\$103,038	\$400,000	\$0	\$0	\$84,806
Other Federal	\$0	\$0	\$8,703	\$10,000	\$600,000	\$0	\$0	\$0
County	\$0	\$1,122,334	\$79,699	\$0	\$31,136,873	\$20,292,896	\$0	\$262,468
City/Municipal	\$0	\$0	\$24,741,1	\$0	\$338,686	\$0	\$0	\$0

			07					
Independent Tax	N	N	N	N	N	Y	Y	N
Lib Found: Capital	\$467,000	\$0	\$0	\$5,500,000	\$4,700,000	\$0	\$0	\$0
Lib Found: Income	\$348,893	\$0	\$0	\$2,200,000	\$1,900,000	\$0	\$0	\$0
Library Foundation	\$161,007	\$0	\$0	\$0	\$1,900,000	\$0	\$0	\$0
Library Endowments	\$0	\$4,775	\$0	\$219,060	\$0	\$0	\$0	\$0
Nat'l Found /Endow	\$0	\$279,381	\$142,000	\$546,650	\$839,702	\$0	\$500,000	\$77,620
Other Foundations	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16,790
Friends	\$371,956	\$264,657	\$217,767	\$414,916	\$250,000	\$0	\$0	\$0
Indiv/Group Contrib	\$10,000	\$464,872	\$0	\$899,445	\$410,793	\$10,133	\$0	\$0
Corporate Sources	\$0	\$119,908	\$0	\$0	\$54,823	\$0	\$0	\$0
Special Events	\$0	\$0	\$0	\$280,700	\$282,375	\$0	\$0	\$0
Book Sales	\$0	\$0	\$8,129	\$0	\$100,000	\$69,032	\$0	\$2,601
Fees	\$131,161	\$0	\$0	\$0	\$13,176	\$14,538	\$591,000	\$26,948
Overdue Fines	\$931,738	\$0	\$344,050	\$0	\$551,990	\$214,231	\$0	\$292,948
Retail Outlets	\$0	\$0	\$0	\$0	\$150,000	\$0	\$0	\$0
Product/Service Sales	\$9,609	\$0	\$0	\$0	\$0	\$8	\$0	\$0
Contract Services	\$0	\$0	\$168,743	\$0	\$0	\$0	\$0	\$0
Vending	\$0	\$0	\$5,987	\$131,139	\$30,000	\$7,010	\$0	\$3,743
Rental	\$412,760	\$0	\$4,573	\$73,508	\$0	\$0	\$24,000	\$0
Commission	\$0	\$0	\$9,023	\$0	\$33,917	\$37,962	\$0	\$0

Interest/Investment Income	\$60,000	\$161,877	\$245,199	\$0	\$0	\$838,352	\$930,000	\$540,031	
Total Sources	All 12	\$3,855,904	\$2,442,835	\$26,044,656	\$10,378,435	\$43,942,358	\$21,585,481	\$2,107,051	\$1,425,150

Library Name:	Indianapolis Marion County, IN	Baltimore County, MD	Montgomery County, MD	Detroit, MI	Hennepin County, MN	Las Vegas-Clark County, NV	Buffalo/Erie County, NY	Multnomah County, OR	Free Library of Philadelphia, PA
Street Address:	2450 N Meridian St PO Box 211 Indianapolis, IN 46206-0211	320 York Rd. Towson, MD 21204-5179	99 Maryland Avenue Rockville, MD 20850-2372	5201 Woodward Avenue Detroit, MI 48202-4093	12601 Ridgedale Drive Minnetonka, MN 55305-1909	833 North Las Vegas Blvd. Las Vegas, NV 89101-2062	1 Lafayette Square Buffalo, NY 14203-1887	205 NE Russell Portland, OR 97212-3796	1901 Vine Street Philadelphia, PA 19103-1189
Director	Edward M. Szynaka	Jim Fish	Harriet Henderson	Maurice B. Wheeler	Charles M. Brown	Daniel L. Walters	Diane J. Chisman	Ginnie Cooper (leaving)	Eliot L. Shelkrot
Contact	Lynn Morrow	Jen Evans	Joan Burson	James W. Lawrence	Cindy Ahrens	Nancy Ledeboer	Peggy Skotnicki	Shani Fox	Anne Silvers Lee
Telephone Number:	(317)269-1700	(410)887-6160	(240)777-0002	(313)833-1000	(952)847-8500	(702)507-3610	(716)858-8900	(503)988-5402	(215)686-5300
Web page:	www.imcp.l.lib.in.us/	http://www.imcp.l.lib.in.us/	http://www.mont.lib.md.us/	http://www.detroit.lib.mi.us/	http://www.hclib.org/	http://www.lvccld.org/	http://www.buffalolib.org/	http://www.multcolib.org/	http://www.library.phila.gov/
LSTA	\$0	\$146,650	\$0	\$0	\$0	\$194,590	\$0	\$142,620	\$265,084

E-rate	\$121,186	\$42,759	\$40,476	\$110,786	\$0	\$0	\$316,016	\$35,000	\$0
Other Federal	\$73,026	\$0	\$0	\$185,069	\$0	\$0	\$0	\$0	\$45,201
County	\$0	\$0	\$0	\$1,288,141	\$0	\$0	\$233,037	\$0	\$0
City/Municipal	\$0	\$0	\$0	\$142,700	\$0	\$0	\$0	\$0	\$0
Independent Tax	Y	N	N	Y	N	Y	N	N	N
Lib Found: Capital	\$6,729,321	\$62,780	\$0	\$0	\$884,448	\$0	\$3,200,000	\$6,924,000	\$26,872,000
Lib Found: Income	\$1,020,431	\$51,788	\$0	\$0	\$502,677	\$0	\$400,000	\$1,430,552	\$11,403,000
Library Foundation	\$30,000	\$0	\$0	\$0	\$77,840	\$0	\$50,341	\$510,845	\$0
Library Endowments	\$0	\$0	\$0	\$31,250	\$0	\$0	\$0	\$0	\$741,894
Nat'l Found/Endow	\$152,300	\$0	\$0	\$766,200	\$0	\$148,602	\$88,950	\$35,650	\$1,393,450
Other Foundations	\$0	\$0	\$6,750	\$120,000	\$0	\$0	\$0	\$0	\$1,987,913
Friends	\$0	\$53,000	\$66,882	\$300,000	\$31,502	\$55,929	\$0	\$40,000	\$0
Indiv/Group Contrib	\$0	\$153	\$0	\$10,000	\$0	\$0	\$940,971	\$35,975	\$682,951
Corporate Sources	\$0	\$0	\$0	\$31,000	\$0	\$0	\$0	\$0	\$434,468
Special Events	\$0	\$5,562	\$0	\$1,000	\$0	\$0	\$0	\$0	\$481,858
Book Sales	\$0	\$123,342	\$0	\$0	\$46,976	\$0	\$0	\$0	\$10,433
Fees	\$53,466	\$114,360	\$63,626	\$197,550	\$0	\$0	\$0	\$6,800	\$55,199
Overdue Fines	\$876,384	\$1,315,239	\$836,387	\$65,240	\$1,145,341	\$568,644	\$705,355	\$1,162,897	\$195,374
Retail Outlets	\$990	\$0	\$0	\$0	\$9,000	\$0	\$8,332	\$240,860	\$0
Product/Service Sales	\$0	\$195,869	\$0	\$107,480	\$0	\$0	\$0	\$0	\$5,580

Contract Services	\$77,187	\$0	\$0	\$100,000	\$0	\$671,805	\$0	\$0	\$0	
Vending	\$95,288	\$2,531,173	\$25,205	\$50,000	\$81,000	\$35,344	\$113,000	\$143,036	\$2,774	
Rental	\$0	\$27,650	\$176,476	\$16,000	\$90,660	\$286,630	\$3,500	\$44,150	\$15,650	
Commission	\$6,075	\$314	\$10,256	\$0	\$0	\$22,500	\$5,500	\$264	\$0	
Interest/Invest Income	\$370,960	\$200,331	\$0	\$390,250	\$0	\$368,992	\$95,290	\$537,485	\$249,747	
Total Sources	All 4	\$9,606,617	\$4,870,970	\$1,226,058	\$3,912,666	\$2,869,444	\$2,353,036	\$6,160,292	\$11,290,134	\$44,842,576

Library Name:	Dallas, TX	Harris County, TX	Houston, TX	San Antonio, TX	Salt Lake County, UT	Fairfax County, VA	King County, WA	Peer Averages	HSPLS Differ from Average
Street Address:	151 Young Street Dallas, TX 75201-5499	8080 El Rio Street Houston, TX 77054-4195	500 McKinney Street Houston, TX 77002-2534	600 Soledad Street San Antonio, TX 78205-1200	2197 Eadt Fort Union Blvd. Salt Lake City, UT 84121-3188	12000 Governm ent Center Parkway St 324 Fairfax, VA 22035-0012	960 Newport Way NW Issaquah, WA 98027-2702		
Director	Ramiro S. Salazar	Catherine S. Park	Barbara A.B. Gubbin	Laura Isenstein	Nancy Tessman	Edwin S. Clay	William H. Ptacek		
Contact	Paul Orr	Catherine S. Park	Gregory Martin	Robert Sparks	Gwen Page	Douglas R. Miller	Cheryl Carrabba		
Telephone Number:	(214)670-1400	(713)749-9000	(832)393-1300	(210)207-2500	(801)524-8200	(703)324-3100	(425)369-3200		
Web page:	http://dallaslibrary.org	http://www.hcpl.lib.tx.us	http://www.hpl.lib.tx.us						

	org/	.tx.us/	b.tx.us/h pl/						
LSTA	\$0	\$16,155	\$0	\$210,106	\$0	\$0	\$0	\$129,610	\$732,026
E-rate	\$0	\$0	\$142,595	\$83,694	\$0	\$139,150	\$239,492	\$132,951	-\$42,798
Other Federal	\$65,714	\$0	\$76,046	\$3,135	\$0	\$0	\$0	\$118,544	-\$118,544
County	\$0	\$12,840,986	\$0	\$0	\$0	\$25,433,823	\$52,600	\$9,274,286	- \$9,274,286
City/Municipal	\$21,377,287	\$12,250	\$0	\$0	\$0	\$663,898	\$2,700,000	\$9,275,483	- \$9,275,483
Independent Tax	N	N	N	N	N	N	Y	6 of 24 have	
Lib Found: Capital	\$0	\$0	\$0	\$3,365,809	\$0	\$457,507	\$0	\$5,869,587	- \$5,402,587
Lib Found: Income	\$0	\$0	\$0	\$2,131,373	\$0	\$23,372	\$400,000	\$1,951,199	- \$1,602,306
Library Foundation	\$0	\$0	\$0	\$1,136,400	\$0	\$139,900	\$100,000	\$493,166	-\$332,159
Library Endowments	\$1,724,253	\$0	\$262,596	\$0	\$0	\$0	\$0	\$497,305	-\$497,305
Nat'l Found/Endow	\$0	\$141,300	\$240,700	\$105,500	\$67,900	\$50,800	\$126,200	\$316,828	-\$316,828
Other Foundations	\$0	\$289,632	\$151,525	\$0	\$0	\$0	\$0	\$428,768	-\$428,768
Friends	\$145,000	\$0	\$142,254	\$45,000	\$0	\$81,362	\$0	\$150,591	\$221,365
Indiv/Group Contrib	\$0	\$0	\$40,846	\$5,000	\$0	\$24,472	\$40,000	\$274,278	-\$264,278
Corporate Sources	\$0	\$0	\$435,068	\$0	\$0	\$1,730	\$350,000	\$177,970	-\$177,970

Special Events	\$0	\$0	\$173,620	\$0	\$0	\$3,843	\$0	\$175,565	-\$175,565	
Book Sales	\$0	\$0	\$47,716	\$0	\$88,547	\$61,986	\$30,000	\$53,524	-\$53,524	
Fees	\$89,630	\$0	\$0	\$0	\$0	\$0	\$0	\$111,481	\$19,680	
Overdue Fines	\$553,710	\$0	\$0	\$0	\$1,070,413	\$0	\$1,200,000	\$693,638	\$238,100	
Retail Outlets	\$128,882	\$0	\$0	\$0	\$0	\$0	\$0	\$89,677	-\$89,677	
Product/Service Sales	\$11,050	\$0	\$0	\$0	\$0	\$0	\$0	\$79,995	-\$70,386	
Contract Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$254,434	-\$254,434	
Vending	\$365,841	\$0	\$0	\$0	\$88,581	\$0	\$155,000	\$227,301	-\$227,301	
Rental	\$15,346	\$0	\$0	\$0	\$0	\$0	\$0	\$64,845	\$347,915	
Commission	\$127,679	\$0	\$0	\$0	\$0	\$6,441	\$0	\$23,630	-\$23,630	
Interest/Invest Income	\$0	\$0	\$85,024	\$107,239	\$95,241	\$14,264	\$655,000	\$346,193	-\$286,193	
Total Sources	All 92	\$24,604,323	\$13,300,390	\$1,797,956	\$7,193,256	\$1,410,682	\$27,102,548	\$6,048,292	\$31,210,848	- \$27,354,936

Appendix II-5 Resources for the Library Friends from Peer Library Friends

The following are resources of potential interest from peer libraries throughout the U.S. that the Friends might want to consult.

San Diego Public Library

Consider working on one or more videos about the library, to promote it, to introduce it to new immigrants, elementary school students, etc. or to introduce the new information technology available at HSPLS libraries. A good promotional video example is the "Building a Dream" video available at <<http://www.sdcl.org/>>.

The San Diego Public Library web site <<http://www.sdcl.org/>> had good basic *How You Can Help* section with sub-sections covering: Why Your Support is Needed, Volunteer Opportunities at the San Diego Public Library and Friends of the San Diego Public Library.

Tampa Hillsborough County Public Library

Tampa Hillsborough County Public Library Friends <<http://www.thpl.org/thpl/friends/>> run a bookstore <<http://geocities.com/rokorz/store.html>>, have a newsletter <<http://geocities.com/rokorz/news.html>>, and sponsor Four Seasons Author Series luncheons.

Miami Dade Public Library

Miami Dade Public Library Friends of the Library <<http://www.mdpls.org/info/friends.asp>> E-mail: friends@mdpls.org Phone: 305-375-5017 Membership application online <<http://www.mdpls.org/info/pdf/Application.pdf>>, Honor with Books Form <<http://www.mdpls.org/info/pdf/HonorwithBooks.pdf>>, listing of new or renewing friends <http://www.mdpls.org/info/temp/best_friends.asp>, and Roemer notecards <http://www.mdpls.org/info/temp/best_friends.asp>.

Advocacy: Friends play an important role in advocating on behalf of the library system at the local, state and national levels. The Friends are proactive in providing increased knowledge and understanding of library services so that the library will receive the funding necessary to serve the needs of an ever growing population.

Volunteer Opportunities: In addition to providing help at all branch libraries, Friends may be recruited to work on the annual book sale and other fundraising events.

Outreach Programs: The Friends raise money through memberships and donations to provide outreach programs that include everything from author series, art exhibits and storytelling festivals to tutoring, business and computer workshops. These programs are important because they are the gateways to further learning and development, ultimately affecting the community as a whole.

Library Cooperative of Palm Beach

Friends of the Palm Beach County Library System, President Betty Bell, Annual Friends membership begins at \$10; Family membership is \$20 per year. Have downloadable application <http://www.pbclibrary.org/membership_form.htm>.

Indianapolis-Marion County Public Library

Friends of the Library <<http://www.imcpl.lib.in.us/friends.htm>>, is a component of the Foundation, Friends have an online membership form <http://www.imcpl.lib.in.us/friends_form.htm> and provides: “early access to the library's book sales for Friends Nights and Friends ½ Price Nights; preferred seating at the annual Marian McFadden Memorial Lecture; a complimentary subscription to Reading in Indianapolis, the Library's monthly newsletter; discounts on library specialty items such as tote bags, note cards, umbrellas and apparel; and the pleasure of helping others benefit from popular library programs.”

Montgomery County Public Library

Friends of the Library <<http://www.mont.lib.md.us/getinvolved/friends2.asp>> 99 Maryland Ave., Rockville, MD 20850 Phone: 240.777.0020 Ari Z. Brooks, Executive Director, Stephanie France, Office Manager.

Detroit Public Library

Friends of the Library <<http://www.detroit.lib.mi.us/friends/>> Phone: (313) 833-4048 Membership: Douglas Rasmussen, President, Patrice R. Merritt, Executive Director, Cheryl Sartin E-mail: csartin@detroit.lib.mi.us. Have online newsletter, *Among Friends*: <http://www.detroit.lib.mi.us/friends/newsletters/FDPL_NEWSLETTER_Fall2002.pdf>. Provides lectures by renowned authors, film screenings, exhibit openings and symposia -- designed to educate and entertain. Support a wide range of traditional reading programs and educational initiatives, including the Summer Reading Program, the Junior Great Books Program, the Celebrity Author Series, Poetry at Main/Poet in Residence, the Author Day Program and Black History Month Programs.

Hennepin County Public Library

Friends <<http://www.hclib.org/pub/info/support/friends.cfm>> Friends of the Library News is a section of *Library News* <<http://www.hclib.org/pub/info/ei.cfm>>. Friends of the Library and volunteers help the Library connect with the community. In 2000, some 1,200 active volunteers, including Friends members, contributed 34,952 hours of service, an increase of 36 percent over 1999. The Friends groups also promoted library services in their community, sponsored 143 events, and raised \$92,659 for special library materials and services outside of the regular library budget. The first-ever system wide Friends membership drive took place in October, showcasing the Friends' work as well as attracting new members. Benefited by the drive, Friends membership rose to 1,754. The StartSMART literacy program for children and families received a national award. It

provides trained volunteer readers, including Crystal police officers, in key community locations, such as the Crisis Nursery in Golden Valley.

Las Vegas-Clark County Public Library

Friends of Southern Nevada Libraries <<http://www.lvccl.org/about/friends/index.html>> 833 Las Vegas Boulevard, North Las Vegas, Nevada 89101 (702) 507-3443. The Friends run a number of bookstores in branches.

Multnomah County Public Library

The consultants have already provided contact information and introductions to the key library support personnel at this system. Friends of the Library <<http://www.friends-library.org/index.html>> 522 SW Fifth Ave. Suite 1103 Portland, OR 97204 Phone: (503) 224-9176 E-mail: foladmin@europa.com Newsletter: <<http://www.friends-library.org/news.html>> Book sale netted \$90,000 last year. The Friends run the Friends' Library Store that generated \$250,000 in 2000 according to PLDS special survey data.¹³⁷ Friends' Library Store <<http://www.friends-library.org/store.html>> “is a project of the Friends of Multnomah County Library. We are located in the beautiful, renovated Georgian-style Central Library in downtown Portland, Oregon. The Friends support the activities of the library and all proceeds from the store help fund a variety of library programs. Under the direction of the Friends' board of directors and a paid store manager, the store is staffed primarily by library-loving and dedicated volunteers.

We offer a selection of gifts and useful items for the reader and writer, everything from pens to desk accessories, note cards to pillows, Shakespeare card games to jewelry. We specialize in a wide variety of bookmarks, bookends and book totes. For children there are games, puppets and backpacks. Literary-theme umbrellas, bags, shirts, ties, coffee mugs -- in fact, anything (and more!) that a reader could want. We also offer special Multnomah County Library items, including an umbrella, totes and a baseball cap.”

Free Library of Philadelphia

Friends of the Free Library <<http://www.library.phila.gov/friends/frndsflp.htm>> Executive Director: Amy Dougherty <AmySDougherty@aol.com> Friends programs <<http://www.library.phila.gov/friends/programs.htm>>. The Friends run an interesting bookstore. “Book Corner BOOK CORNER, established in 1991, is the result of an historic partnership between The Friends of the Free Library of Philadelphia, Free Library of Philadelphia, the book selling community and the generosity of the people of Philadelphia. Book Corner offers new, rare and good used books in all genres at the lowest prices in the area. You'll find plenty of places to sit, with cool jazz or classical music in the background, poetry readings, monthly sales and a dedicated staff of book lovers. We are located at 311 North 20th Street in the former Library bindery, directly behind Central Library. Book Corner is managed by Leonard Gontarek.”

¹³⁷ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

Dallas Public Library

Friends of the Dallas Public Library <<http://dallaslibrary.org/Friends/Friends.htm>> 1515 Young Street Dallas, TX 75201 Phone: (214) 670-1458 Fax: (214) 670-1453 Email: Friends@dallaslibrary.org

Houston Public Library

Clayton Library (for genealogical research) Friends <<http://www.hpl.lib.tx.us/hpl/about.html#lk8>> David B. Singleton, President 100% of the funds raised by CLF go for the acquisition of books, microfilm, CD-ROM publications, and periodicals for Clayton Library or for the improvement and expansion of library facilities.

Friends of the Houston Public Library <<http://www.friendsofhpl.org/>> 500 McKinney St. Houston, TX 77002 Phone: 832-393-1387 E-mail: info@friendsofhpl.org Caren Zentner Luckie President, Edie Archer Chairman. Annual book sale Friends ByLaws & Mission <<http://www.friendsofhpl.org/mission.html>>

San Antonio Public Library

Friends of the Library P.O. Box 831174 San Antonio, TX 78283-1174 <<http://www.ci.sat.tx.us/library/support/friends.asp?res=1024&ver=true>> Newsletter <http://www.ci.sat.tx.us/library/pdf/friends_vol14no6.pdf>.

Fairfax County Public Library

Friends of the Library <<http://www.co.fairfax.va.us/library/friends.htm>> are the “organizations that sponsor used book sales, programs and other activities. Friends groups have raised funds for computer equipment, the Summer Library Program and special projects.”

King County (Seattle, WA) Public Library

Friends of King County Library System <<http://www.kcls.org/volunteers/friendvol.cfm>>. There are currently 36 Friends groups who raise funds to support special projects and activities. In addition, the Friends sponsor the annual KCLS used book sale. In 2001, Friends of the Library raised nearly \$200,000 in support of special programs and activities throughout the Library System.

Appendix II-6 Resources for the Foundation from Peer Library Foundations

The following are resources of potential interest to the Foundation from peer libraries throughout the U.S. that the Foundation might want to consult.

San Diego Public Library

The San Diego Public Library web site <<http://www.sdcl.org/>> had good basic *How You Can Help* section with sub-sections covering: Why Your Support is Needed, The San Diego Public Library League, memorial gifts, Library Legacy Society, and capital gifts.

Denver County Public Library

The Denver Public Library Friends Foundation was formed in 1982 following the merger of the Library's Friends members and Denver Public Library Foundation, creating a single organization, the DPLFF. The DPLFF is comprised of three full-time and two part-time staff members and 31 Trustees and Board members. On December 5, 2002 the Denver Public Library Friends Foundation (DPLFF) reorganized. See: <http://www.denver.lib.co.us/dpl/news/friends_reorg.html>. "The Denver Public Library Friends Foundation will maintain its role as a 501(c) (3) organization for the singular purpose of holding and managing the private funds and endowments of the Denver Public Library. The Denver Public Library Friends Foundation will no longer assume responsibility for the private fund-raising activities or events of the Library. 'This reorganization consolidates all Denver Public Library fund-raising activities under the auspices of the Library, thereby eliminating the complexities of dual fund-raising responsibilities within the two organizations,' said Ben Duke, III, president, Denver Public Library Friends Foundation (Phone: 303-778-0938). The consolidation also eliminates the expenses associated with maintaining dual development and advancement staffs and activities, and in these times of budget cuts, the cost savings will be important and beneficial to the Library. As of this time, the DPLFF plans to continue managing its membership of 2,559 members. The Library has not determined plans for annual events previously produced and sponsored by the DPLFF such as the Annual Summer Used Book Sale (July) and Booklover's Ball (October). The DPLFF remains committed to producing the Rare & Not-So-Rare Book and Art Auction fund-raising event in January 2003.

The library has an interesting Gifts and Giving section of web page: <http://www.denver.lib.co.us/about_us/support/gifts_giving.html> and includes ability to donate while shopping Amazon.com.

Broward County Public Library Foundation

Broward County Public Library <<http://www.broward.org/library/foundation.htm>> (954) 357-6371 "The Broward Public Library Foundation is a nonprofit organization created in 1982 for the purpose of providing books and services not otherwise available for

Broward County Library. The Foundation seeks private and corporate contributions to support library projects, such as the Collier City Family Learning Center, the Annual Children's Reading Festival, the Main Library's Viewing and Listening Center, amplification equipment for hearing-impaired patrons at library programs, the Bienes Center for Literary Arts, and much more. Individual and corporate memberships are available. Donations can be made as cash, property, insurance policy, charitable trust, bequest, or in-kind. Funds can be given in honor of specific individuals or for the purchase of specific materials. Other creative options for giving can also be explored.”

Tampa Hillsborough County Public Library

Upper Tampa Bay Library Foundation, Inc. Countryway Boulevard Tampa, FL 33626
Brett Scharringhausen, Chair E-mail: foundation@UTBLfoundation.org
<<http://www.infocentrics.net/utb/foundation.htm>>

Indianapolis-Marion County Public Library Foundation

Library Foundation <<http://www.imcpl.lib.in.us/found.htm>> P.O. Box 6134 2450 N. Meridian Street Indianapolis, IN 46206-6134 (317) 269-5202. Foundation includes Friends and Light Up a Life campaign <<http://www.imcpl.lib.in.us/lightlif.htm>>. Light Up A Life campaign was established to ask for support to address three vital "people needs" that cannot be funded by existing operating budgets. These needs are: adult literacy and lifetime learning, children's reading programs and support of special events. Contributions to these two programs make it possible to have speakers for the annual Marian McFadden Memorial Lecture, the AUL Business Lecture, IndyReads <<http://www.indyreads.org/>>, Volunteer Services <<http://www.imcpl.lib.in.us/volnteer.htm>>, summer reading program <<http://www.imcpl.lib.in.us/found.htm>>, and commemorative ceramic book tiles <<http://www.imcpl.lib.in.us/found.htm>>.

Baltimore County Public Library Foundation

Foundation <<http://www.imcpl.lib.in.us/found.htm>> 320 York Road Towson, Maryland 21204 410-887-3282 e-mail: foundation@bcpl.net Debbie Thomas Resource Enhancement Coordinator. Goal: “To provide funding for projects that encourage children and young adults to cultivate a life-long enthusiasm for reading and learning. To act as advocates for the library to ensure that library services continue on into the future. To raise funds for specific programs or projects that enhance system-wide Baltimore County Library goals and objectives. Committed to buying bookmobile, held its first gala last year Novel Night Gala.”

Hennepin County Public Library

Library Foundation of Hennepin County 12601 Ridgedale Dr. Minnetonka, MN 55305
Phone: 952-847-8634 Fax:952-847-8600 cdegraff@hclib.org WWW:
<<http://www.hclib.org/pub/info/support/foundation.cfm>> Karla Kimerer, Library

Foundation Executive Director. Web site has a summary description of the year's activities. Has separate annual report (not online). Has new grants section: <<http://www.hclib.org/pub/info/support/NewGrants.cfm>>. On the Internet a donor can make donations to the Foundation via the Open Philanthropy Foundation <<http://www.dothegood.com/>> whose pages on the Foundation also contain financial information from 1996-1998. See: <http://www.dothegood.com/view/financials.mhtml?project_id=44>. Potentially helpful is the Foundation's Mission, Vision, & Values Statement <<http://www.hclib.org/pub/info/support/ValuesVisionMission.cfm>>.

Buffalo and Erie County Public Library

Library Foundation of Buffalo & Erie County, Inc. <<http://www.buffalolib.org/foundation/index.asp>> Leonard R. Lenihan, President, Kathryn Vedder Executive Director The Library Foundation of Buffalo and Erie County 1 Lafayette Square Buffalo, New York 14203 Phone: (716) 858-6334 vedderk@buffalolib.org

Multnomah County Public Library

Library Foundation <<http://www.libraryfoundation.org/>> 522 SW Fifth Avenue, Suite 1103 Portland, OR 97204 Phone: (503) 223-4008 Fax: (503) 223-4386 E-mail: info@libraryfoundation.org Merris Sumrall, Chief Executive Officer merriss@libraryfoundation.org Last year the Foundation gave approximately \$433,000 in support of library programs.

Free Library of Philadelphia

Right on the library's web site is a prominent button: Donate here <<http://www.library.phila.gov/donate.htm>> containing an online donation form. Also potentially helpful is the Foundation's mission statement <<http://www.library.phila.gov/mission/FoundMission.htm>>. According to 2000 PLDS special survey data¹³⁸ the Foundation had capital of nearly \$27 million with annual income of \$11 million. The Philadelphia experience is briefly discussed in Albanese (2002, p. 42) footnoted on the next page.

Fairfax County Public Library Foundation

Fairfax County Public Library Foundation <<http://www.fcplfoundation.org/>> 12000 Government Center Parkway, Suite 324 Fairfax, VA 22035 (703) 324-8300 Annual report <<http://www.fcplfoundation.org/annualreport.pdf>>. Provides a good model of online basic donor information <<http://www.fcplfoundation.org/donorinfo.htm>>. The Fairfax County Public Library Foundation, Inc. received more than \$1,034,914 in cash and in-kind gifts in fiscal year 2002.

¹³⁸ Public Library Association. (2001). *Public Library Data Service Statistical Report 2000: Special Survey on Finance*. Chicago: Public Library Association. <<http://www.pla.org/plds.html>>.

King County Library System Foundation

King County Library System Foundation 960 Newport Way NW Issaquah, WA 98027
Phone: (425) 369.3448 Fax: (425) 369.3255 Jeanne Thorsen, Executive Director
<<http://www.kcls.org/foundation/foundation.cfm>>. Also provides the opportunity for donors to make a donation online <<https://secure.entango.com/donate/9xn87TGPKPc>>. Annual Report <<http://www.kcls.org/foundation/foundreport01.cfm>>. From the annual report is an interesting summary of ways that they obtain donations and other activities of note:

In-kind Donations - The Foundation gratefully accepts in-kind donations of goods and services related to our mission and programs.

Corporate Sponsorships - We invite local businesses to support our mission through sponsorships of programs including our annual Literary Lions Award Dinner in March and our annual StoryFest International storytelling event in August. The Foundation also welcomes corporate sponsorship of reading programs, special collections, and community development projects.

Workplace Giving and Matching Gifts: Workplace giving programs through King County Library System, King County Employee Charitable Campaign, and United Way provide supporters with a convenient way to support the Foundation through payroll deductions.

Additionally, many companies and organizations, including BEA Systems, Inc, Bank of America, Boeing, Microsoft, SAFECO, Connor Homes, GlaxoSmithKline Foundation, Qwest, Olin Corporation, IBM, McGraw-Hill, Buck & Gordon LLP, Linn Schisel & DeMarco, Exxon Mobil, Washington Mutual and The Bill & Melinda Gates Foundation, generously match their employees' donations.

Buy KCLS Clothing <<http://www.kcls.org/foundation/kclsapparel.pdf>> When you buy a stylish denim shirt, a fleecy navy sweatshirt or a sharp black polo shirt with the KCLS logo, you add great eye-catching items to your wardrobe and you support KCLS Foundation outreach programs.

The King County Library System Foundation recently announced its Literary Lions Award winner for 2003. The Starbucks Foundation will be honored for its efforts to support literacy at the tenth annual Literary Lions Dinner Saturday, March 15 at the Bellevue Regional Library. Author and National Public Radio host Scott Simon (Jackie Robinson and the Integration of Baseball, Home and Away: Memoir of a Fan) will be the keynote speaker. The sit-down dinner, a Benefit Book Sale with titles by more than two dozen guest authors in attendance. Proceeds from the Literary Lions Dinner support KCLS literacy and outreach programs. Individual tickets are \$125 and table sponsorships begin at \$2,500.

In addition, Foundation members may want to look at a recent article by Albanese (2002)¹³⁹ discussing foundations for the future. The article also mentions Corson-Finnerty & Blanchard's (1998) book¹⁴⁰ on web-based fund raising and Corson-Finnerty's online fundraising web site <<http://www.fund-online.com/>>.

¹³⁹ Albanese, Andrew Richard. (2002, May 1). Foundations for the future. *Library Journal*, 40-43. Also of interest: Krois, Jerry. (Compiler). (2000). An introduction to public library foundations: A member's guide. Wyoming State Library Division.; Sherman-Smith, Amy. (2000). Legacies for libraries: A practical guide to planned giving. Chicago: American Library Association.; Steele, Victoria. (2000). Becoming a fundraiser: The principles and practice of library development. Chicago: American Library Association.

¹⁴⁰ Corson-Finnerty, Adam & Blanchard, Laura. (1998). *Fundraising and friend-raising on the web: A handbook for libraries and other non-profit organizations*. Chicago: ALA Editions.

Appendix II-7 Draft User Survey of HSPLS Additional Revenue Preferences
Hawaii State Public Library System
Library User Survey

Did You Know: State Tax Support Is Not Enough – Your Library Can’t Make It Without You. Hawaii’s public libraries are mostly funded by state government unlike other states where county or city government funds the public libraries. If you had to pay commercial rates, your Hawaii public libraries return over \$13 in library services for each tax dollar invested. This saves the average Hawaii family over \$747 a year. Hawaii public libraries deliver library services on par with peer libraries throughout the U.S. and national norms. But if you compare our Hawaii public library system to its peers and national norms, we suffer a \$7-12 million shortfall each year in revenue. This means not as many books and materials as users of peer library systems, less current materials, fewer staff, databases and computers. This survey asks your advice for how the library system can make up its revenue shortfall. **Mahalo** for doing the survey. Please do not do the survey again if you did one before. Place form in the box by the door as you leave.

- 1) I received this survey at which library branch _____
- 2) Overall, how would you grade Hawaii public library services? (Circle one)
 A=Excellent B=Good C=Average D=Poor F=Failing DNK= Do not know
- 3) What would you cut first if there are additional budget cuts (Circle only one choice)?
 Cut books and library materials Cut library branch hours
 Cut library staff Close libraries
- 4) The library may have to charge for some library services. Circle the one service that you use and you are willing to pay for from the following list:
 Charge \$10 to issue a new adult library card, \$15 for non-resident visitor library card (children are free)
 Charge \$10 per one week book rental for expanded Hot Pick best seller service featuring more titles with more copies at each branch
 Charge \$1 per page for all computer printouts
 Charge for faxing \$2 for first, \$1 second+ sheets inter-island, additional for mainland and international
 Charge \$5 per page for notary service
 Charge \$15 per test (plus postage) for test proctoring
- 5) How can you help meet its annual budget shortfall (check off each box you will support)?
 Check off the \$2 donation to the library check off box on next year’s state tax form
 Donate \$15 per person to the Hawaii Library Materials fund to be used for purchase of books and other materials this year at your library branch (donation box at the door)
 Donate funds annually to develop a collection of library materials of interest to the local workforce, business, or special interest
 Donate money for memorial book (or other library material) purchase to honor a friend, special event or even a well loved pet with a bookplate on the item
 Support library programs or services: Donate prizes or refreshments for after school or summer reading programs, sponsor fund raiser or store promotion at your business, advertise library programs, give equipment, furniture or supplies (Discuss your idea now with you local librarian)
 Donate part of your estate to the library (It is never to early to plan, contact your librarian for details)
 Volunteer your time. (Ask your librarian for current needs.)
 Note: your donation to the public library (as a non-profit) may be tax deductible.
- 6) Other ways you would be willing to help? _____

Appendix II-8 Corporate Giving for Foreign Language Collection Development

The Hawaii Public Library System (HSPLS) has a number of library users with a strong interest in non English language materials including: Chinese, Japanese, Korean, and Spanish. Library users of these non English collections include:

- Seniors who may never learn English,
- Recent immigrants,
- Visitors seeking to keep up with activities and culture in their homeland,
- Citizens seeking to retain their second language skills,
- Local businesses seeking to market their products abroad, and
- Students studying these languages.

HSPLS is seeking funding to expand its non English language library collections through external funding via a combination of grants, donations, planned giving and volunteer efforts. One of the consultants was asked to take a brief look at the feasibility of expanding the Chinese collection at the Liliha branch library along the model suggested by the successfully Moon Book Club at McCully-Moiliili branch. The Moon Book Club's effort is summarized in a Starr-Bulletin article¹⁴¹ and its relationship to HSPLS codified more recently in a memorandum of agreement.¹⁴²

The Good News

The Liliha Chinese collection, begun about eight years ago and sited within a vibrant Chinese community, consists of 4000-5000 books, periodicals, CDs, videos and other materials.¹⁴³ Almost all the collection has been donated. The collection grows by 300-400 items a year with each item cataloged and linked into HSPLS' automated catalog. The collection is well managed, heavily used (with some circulation to the neighbor islands beyond Oahu), with room enough to grow.

The Challenge

HSPLS will feel compelled to reduce its effort in the partnership, in particular paying for the cataloging, should the present budget stress continue. There is obvious demand to both expand the size and quality of the collection. Little can be done to promote the collection beyond word of mouth (often limited to Oahu).

Efforts have been made to approach potential donors in the Chinese community in the past without success. China Air has been contacted to aid in transporting materials to Hawaii without any response. The collection is managed as a labor of love by a dedicated HSPLS staff member who sees the obvious need. But he lacks the time and

¹⁴¹ (2001, February 21). Steel company donates \$55,000 for Korean-language books. *Honolulu Star-Bulletin*. <<http://starbulletin.com/2001/02/21/news/story12.html>>.

¹⁴² Moon Book Club and HSPLS. (2002, July 15). Memorandum of agreement between the Hawaii State Public Library System and Moon's Book Club. Honolulu: HSPLS.

¹⁴³ The collection is roughly half the size of the Korean collection at McCully.

connections to systematically pursue an effort to move the effort to a sustainable funding base.

Recommendations

Find a champion who has the connections to the Chinese donor community to take on this project. If a champion can be found, investigate one time funding to give the collection a publicly visible boost coordinated with fund raising efforts.¹⁴⁴ A possible champion, if not already spoken for Flora Lu and it is certainly worth contacting Agnes Yu of China Air regarding free or reduced cost transportation of materials.

¹⁴⁴ Two possible funding sources may be Carnegie Corp. of New York <<http://www.carnegie.org/>> and perhaps the Blakemore Foundation <<http://www.blakemorefoundation.org/>> Attn: Mr. Griffith Way, Trustee c/o Perkins Coie LLP 1201 Third Avenue, Suite 4800 Seattle, WA 98101-3266 E-mail: Blakemore@perkinscoie.com Phone: (206) 583-8778. Carnegie has funded non English language collections in libraries throughout the U.S. See for example, Sterns, Matt. (2000, April 2). KC public libraries benefit from purchases through Carnegie grant. Kansas City Star <<http://www.kcstar.com/item/pages/local.pat,local/37745be0.402,.html>>. The Blakemore Foundation offers the Frances Blakemore Asian Art Grants are designed to improve the understanding of Asian fine arts in the United States. Grants will be made only to tax-exempt organizations in the U.S. for programs, exhibits, or publications that improve the understanding of Asian fine arts in the U.S. Asia is limited to the countries of China, Japan, Korea, Burma, Cambodia, Indonesia, Laos, Thailand, Malaysia, Vietnam, Philippines, Mongolia, and Tibet.

Appendix II-9 Food & Beverage Vending Contracts

The following outlines steps, related issues and draft documents to be considered when contracting to vend food and beverages at HSPLS library branches.

1) Decide how much of the vending effort HSPLS want to do. For example, at one extreme, the library could purchase the machines and snacks and beverages, restock and maintain the machines.¹⁴⁵ At the other, more common, extreme the entire process could be outsourced with HSPLS receiving a commission and other incentives. Doing everything offers increased profit and risk. Outsourcing lowers both profit and risk. The following assumes that HSPLS outsources food and beverage vending.

2) Establish a HSPLS Vending Machine Provider list.¹⁴⁶ This identifies vendors who are qualified and the conditions they have agreed to when providing food and/or beverage services to the libraries. The list also sets out conditions and procedures that all branch libraries must adhere to if participating in the contract.

a) Address a range of issues discussed in the model RFP (See Appendix II-8a). For example, HSPLS needs to be sensitive to existing Blind Vendor and the federal school breakfast and lunch law¹⁴⁷ and regulations (HSPLS does not appear subject to either, however prudence dictates care). Sensitivity to Friends and Foundation who might feel that HSPLS is encroaching on their turf.¹⁴⁸ HSPLS needs to decide what it will manage centrally and what the branches will manage (the school central administration set the general conditions, authorize the vendors, provide accounting services while the individual schools choose whether to participate, select from approved vendors, choose which products to offer and site the equipment). Who will receive the resulting revenue (goes to a general fund distributed by headquarters, goes to the branch where the revenue was produced, limited for some purpose, etc.).

b) The Department of Education's (DOE) vending contract is about to be re-negotiated. HSPLS should consider whether it wants to be included in with the schools – and

¹⁴⁵ Sams Club in Honolulu (May 2003) sells a snack machine for \$2400 as beverage machine for \$1100 and a dollar (only) change machine for \$400. Sams Club also sells beverages and snacks to be used with the machines. Most purchasers appear to be for small business staff use according to Sams Club staff. The above offered for your information, not as an endorsement.

¹⁴⁶ Most relevant may be the existing DOE. (2000, November 27). Beverage vending machine DOE provider list # E01-11 (Memorandum). Honolulu: DOE. Also of interest: Suffolk County Community College. (2002). Vending Request for proposal documents. <http://www3.sunysuffolk.edu/Administration/BusinessAffairs/RequestForProposals/viewProject.asp?project_id=62>. For a recent survey of issues at a mainland system see: North Suburban Library System (Wheeling, IL). (2002, May). NSLS Fast Facts #353 - Vending Machines. <http://fastfacts.nsls.info/surveys/pff353sum_1.asp>.

¹⁴⁷ Law requires that there be no “competitive food sales of minimum nutritional value” during the school lunch program. There may need to be some discussion with DOE regarding school public libraries.

¹⁴⁸ Friends run such operations in other public library systems. §312-3.8 permits both Friends and Foundation to run vending operations.

whether it will be allowed to be included.¹⁴⁹ At present, the position (Head of Procurement) responsible for negotiating this contract is vacant at DOE. The advantage to HSPLS is that the negotiation of the best volume deal and subsequent account management could be handled by DOE without cost to HSPLS. If participating with the schools is not an option then,

c) Issue an RFP for vendors to supply food and/or beverage services to HSPLS. It may be appropriate to issue separate RFPs, one for food, one for beverage as the vendors with the capacity to participate may be different. See Appendix II-9a for a sample RFI. See Appendix II-9b for a list of potential vendors.

d) Establish an approved list with policies and procedures for branch library participation.

Note that establishing an approved vendor list or participation in a DOE approved list does not require that HSPLS libraries participate – it provides an administrative vehicle so that libraries can participate more quickly and satisfactorily with limited risk to HSPLS. Once an approved list is in place, HSPLS could decide how many libraries participate and when – so HSPLS could try a pilot to get a better idea of what was involved and what revenue might be expected. That said, there are administrative costs to the RFP/Establishing an approved vending list processes.

¹⁴⁹ Present contact Chris Ito. ASB 586-3450, Operations 586-3130, Procurement 675-0130.

Appendix II-9a Draft HSPLS RFP for Food & Beverage Vending Services

(Note: This is a sample rough draft meant to serve as the beginning discussion point for issues related to an HSPLS vending initiative. For the sake of brevity two documents have been combined here: a request for proposal (soliciting vendor participants in a provider list) and parts of the resulting provider list (particularly as they relate to procedures to be followed by HSPLS and its branches). Further, it may be more appropriate to prepare separate RFPs for food and for beverage vendors.)

Introduction

The Hawaii State Public Library System, hereinafter referred to as HSPLS, requests your proposal to provide, maintain, and operate a food and/or beverage vending machine service at branch libraries of HSPLS on Hawaii, Kauai, Lanai, Maui, Molokai and Oahu.

HSPLS does not currently have any on-site vending machines, either contracted or self-operated, that provide service to its library users or staff.

This proposal will be competitively bid with the award being made to the companies in which HSPLS' opinion appears most qualified to offer the best service and variety to the libraries along with the best compensation program for HSPLS. An award will place the selected companies on an Approved HSPLS Vending Machine Provider List. Branch libraries can only choose a provider from the approved provider list should they wish to have vending machines at their sites.

HSPLS' decision will be made on the factors listed below:

- Experience/Reputation in the Industry and Local Community
- Rate of Commission
- Demonstrated Sanitation Practices
- Quality and State of the Art of Equipment Supplied
- Accounting Practices Related to Collection of Revenues
- Management and Service Experience of Account Executives
- Quality of Product/Merchandising
- Creativity/Innovation, Examples of Innovative Products or Additional Services Offered
- Thoroughness of Completing All Elements of the RFP

HSPLS has the right to reject any or all bids which at its sole discretion, it determines are not acceptable.

Proposal Presentation & Documentation

Your proposal should be submitted, outlining and documenting your company's ability to satisfy the above criteria. The proposal should be organized and appropriately tabled under the heading and content as set forth in these sections.

Please provide the following information in the introduction of your proposal:

A current annual financial report prepared within the last 12 months.

A list of at least five (5) of your current vending accounts in [city] counties.

An organizational chart of your corporation/company on a state and county (or equivalent) basis.

A resume of the supervisor and manager who would handle this account.

A formal description of your standards and policies for your employees, including the basis for which they are paid and related benefits.

A list of your purveyors.

A list of style and brands of equipment you will be providing including cut sheets.

Section 1 Term

Alternative 1 (DOE Beverage Contract approach)

Contract shall be for the twelve-month period November 10, 2003 to November 10 2004, with option to extend for four 1 year periods. However, schools are cautioned that any incentive(s) negotiated during the decision-making process shall not exceed the original contact period (November 10, 2003 to November 10 2004).

Alternative 2

HSPLS will review bids from vendors starting with a minimum of a three (3) year agreement and encourage vendors to submit additional bids for two one (1) year extensions.

The term of this agreement commences on July 1, xxxx, and terminates on June 30, 200x for a (3) year agreement or June 30, 200x for a four (4) year agreement or June 30, 200x for a five (5) year agreement.

Notwithstanding Section 1, Article “A”, either party may terminate this agreement without cause by giving the other party sixty (60) days written notice prior to desired termination.

The sixty (60) day cancellation period is deemed waived if the vendor, upon receiving written notice from HSPLS of a substantial failure to perform its duties as outlined, does not correct such failure(s) to the HSPLS’ satisfaction within five (5) working days of notification.

Vendor agrees to remove all machines at the effective date of termination of this agreement.

Extension of this agreement may be awarded on an annual basis after the initial term by mutual written agreement of the parties concerned.

Section 2 Notice

Any notice shall be deemed sufficient, when, if given by HSPLS, to the vendor, it shall be sent by registered or certified mail addressed to the vendor at the business address shown on the bid and when, if given by the vendor to HSPLS it shall be sent by registered or certified mail to HSPLS, Attention: Chief Financial Officer, [mailing address]

Section 3 Modification

Modifications to the terms of the agreement may be made by mutual agreement in writing between the two parties.

Re-negotiation of price/commission schedules shall not in any manner affect any of the other provisions of this agreement. It is mutually agreed that the commission is based upon the cost of goods and applicable taxes and fees at the time of execution of this agreement. If a change occurs in the rates of taxes or fees or in the cost of goods vended, then the commission schedule and/or the selling price will be adjusted upon mutual agreement of the parties concerned.

Vendor will provide, at its cost, necessary documentation to HSPLS to any change it requests under Section 3, Article "B".

Section 4 Vending Machines

The vendor shall install, at its expense, at the locations set forth on attachment "A" the number and types of vending machines specified. HSPLS shall have the right to determine at any time during the period of this agreement that any of the vending machines are no longer required. These machines, that are no longer required, shall be promptly removed by the vendor and the area restored to its original condition at the vendor's expense.

All vending machines furnished shall be equipped so as to provide thermal overload protection. In addition, all machines shall be equipped with all necessary safety devices which shall be maintained in operating condition at all times. All machines shall be approved by the Underwriter's Laboratories, Inc., the National Sanitation Foundation, and the National Automatic Merchandising Association.

The vendor shall at all times, at its expense, maintain the vending machines, including any meters and special attachments, in proper mechanical working order and make all necessary repairs and replacement of parts.

The vendor will maintain the vending machines, material handling equipment, and service vehicles in a clean, attractive, sanitary and good working condition to the satisfaction of HSPLS.

The vendor shall respond promptly to all HSPLS and branch requests regarding filling of the machines, machine malfunctions and servicing, and any other day-to-day problems related to this agreement.

While on HSPLS library premises, vendor employees must be identified by uniform or prominently displayed identification badge. HSPLS may refuse access to any person not properly identified. All work must be performed during normal library branch operating hours. Exact times shall be coordinated between the vendor and branch manager. The vendor shall employ the best possible practices of work without causing any interruption or interference with library operations.

HSPLS shall have the right to inspect any and all vending equipment at any time for sanitation and housekeeping reasons and conduct bacteriological examinations of the vending machines and products vended that HSPLS deems appropriate. To this end, the vendor will supply HSPLS a designated representative with the necessary means to access all vending machines. HSPLS agrees to notify vendor whenever such access is required.

At the time of initial installation, all vending equipment shall be unused, factory-new, and current production models. All vending equipment shall be coin operated, heavy-duty commercial models, and from a nationally known manufacturer. All machines shall be equipped with a recording counter or meter to provide a record and check of individual sale against cash received. The initial meter or counter reader must be verified in writing by HSPLS personnel. Vending machines are required to have four price changers and bill validators. Change machines must be included as part of the installation in the high volume areas.

Any equipment that repeatedly malfunctions during the contract period shall be removed and replaced with new equipment.

Section 5 Additional Equipment

The vendor shall furnish, at its expense, necessary condiments associated with products vended. This shall include, but not be limited to, sugar, stir sticks, spoons, napkins and related products as deemed necessary by HSPLS.

The vendor will furnish and maintain, at its own expense, change machines as listed in Appendix "B" (not included here).

Section 6 Products

Products to be provided in the vending machines will consist of candy, snacks, gum, and cold canned or bottled beverages.

Products containing low sodium, low cholesterol, low or non fat or other healthy alternative characteristics shall be promoted whenever economically feasible over similar products.

Section 7 Commissions, Incentives and Refunds

Alternative 1

Vendor shall prepare a quarterly financial report for each branch due no later than thirty (30) days following September 30, December 31, March 31 and June 30, including the following information for each branch:

Number of drinks placed in each machine

Potential cash sales (based on vend price)

Actual cash returns, by month

Commissions earned

These reports shall be submitted to HSPLS as follows: one copy to the branch manager and one copy to the HSPLS Vending Services Coordinator.

Alternative 2

Vendor shall pay HSPLS a monthly commission payment that is a percentage of gross vending sales (less sales tax) as appropriate for each participating branch. Two separate monthly checks will be required. Vendor will be notified before the commencement of the account as to how to divide the vending commission checks.

Commission monies due will be paid on a monthly basis. Vendor shall submit to HSPLS by the 15th day following each calendar month for all sales from the machines for the preceding month. In accounting for commissions, a breakdown of machines by location with appropriate sales, sales by category, commission by category, and product commission total, must be provided with each commission check.

In addition to any and all rights and remedies that HSPLS may have pursuant to this agreement or other operation of law, if vendor fails to make any commission payment or pay any other sums when due hereunder on the date when they become due, vendor will pay interest from the date due until paid at the maximum rate permitted by law.

D Any monies due which are not paid within sixty (60) days of due date will, upon election by HSPLS, immediately terminate this agreement.

E. Vendor will be required to supply HSPLS' Cashier's Office a petty cash fund to be used for providing refunds to vending machine customers. HSPLS and the Vendor will mutually agree to the method and accounting procedures of this service.

Section 8 Personnel

Vendor shall at all times maintain on duty adequate staffing of employees for efficient operation. All service calls will be responded to within four (4) hours. If the technician cannot respond within the four (4) hour time frame, vendor must contact HSPLS representative with the expected time of problem correction.

Vendor's personnel shall observe all HSPLS and branch library regulations for driving, parking, and work behavior while on a library branch site.

Personnel relations of employees on the Vendor's payroll shall be the vendor's responsibility. The vendor shall comply with all applicable government regulations related to the employment, compensation and payment of personnel.

Section 9 Utilities

HSPLS shall provide all necessary electric point of connections to vendor within reasonable distance of machine locations.

HSPLS shall pay all utility chargers incurred by the operation of the vending machines and related equipment.

Vendor is to supply, install, and maintain utility cords, etc., so as to comply with the requirements of all applicable health, safety and building codes.

In addition to the requirements set forth in Section 9, vendor will comply with any additional environmental health and safety requirements deemed necessary by HSPLS.

Section 10 Taxes and Fees

Vendor assumes complete liability for all taxes applicable to its property income and all of the transactions arising out of or in connection with the performance of this agreement.

The vendor will not be reimbursed by HSPLS for any direct or indirect tax imposed on it by reason of this agreement.

The vendor shall obtain all necessary permits and licenses for the installation and operation of the vending machines in its name and at its expense.

Section 11 Insurance

Throughout the agreement period, the vendor shall maintain in full force and effect at its sole expense the following insurances:

Comprehensive General Liability Insurance, including broad form contractual coverage, written on an “occurrence basis,” with minimum limits of at least two million dollars (\$2,000,000) protecting it, HSPLS, its officers, directors, agents, employees and assigns of each, from claims for personal injury, bodily injury (including death) and property damage which may arise from or in connection with the performance of vendor’s services hereunder or from or out of any act or omission of vendor, its officers, directors, agents or employees.

Business Automobile Liability Insurance written on an “occurrence basis,” with minimum limits of at least two million dollars (\$2,000,000) combined single limits, protecting it, HSPLS, the officers, directors, agents, employees, and assigns of each from claims for personal injury, bodily injury (including death) and property damage resulting from the ownership, maintenance or use of vendor or its contracted / leased vehicles.

Workers’ Compensation Insurance as required by applicable law (or employer’s liability insurance with minimum limits of one million dollars (\$1,000,000) per occurrence with respect to any employee not covered by Workers’ Compensation.

All insurance required in Section 10 (A) shall be provided by companies that are acceptable to HSPLS and may not be reduced or cancelled unless thirty (30) day prior written notice is provided to HSPLS, its officers, directors, agents, employees and assigns of each as additional named insured. Certificates of insurance and copies of policies as required by HSPLS shall be promptly provided to HSPLS upon request. HSPLS shall have the option to terminate the agreement without motive and without further delegation of any nature whatsoever in the event vendor fails to obtain and/or maintain in full force insurance throughout the term of the agreement.

Vendor shall defend (if requested), indemnify and hold HSPLS, the officers, directors, agents, employees and assigns of each harmless from and against any and all claims, demands, suits, judgments, losses, liabilities, damages, or expenses of any nature whatsoever caused by any (1) negligent act or omission of vendor, its officers, directors, agents or employees, (2) occupational injury or illness sustained by an employee or agent of vendor in furtherance of vendor’s services hereunder to the extent benefits pursuant to applicable workers’ compensation laws are claimed against or to be held payable by any of those hereby indemnified, (3) failure of vendor to perform the services in accordance with generally accepted professional standards. HSPLS shall indemnify and hold vendor its officers, directors, agents, employees, and assigns harmless from and against any and all claims caused by any negligent act or omission of HSPLS, its officers, directors, agents, or employees relating to services authorized pursuant to an agreement.

Section 12 Commercialization

Commercialization for this contract is defined as the marketing of the company or trade name and is limited to the physical space of the vendor's machine(s) and to the selected products to be vended.

Section 13 Branch Responsibility

All branches interested in acquiring a food or beverage vending machine must comply with the terms and conditions of this document. Agreements to install and vend food or beverages from vending machines shall be negotiated only with approved vendors as determined by the RFP process.

The branch manager shall have the responsibility for designating how vending machine income shall be spent.

Section 14 Implementation Procedures

The HSPLS Chief Financial Officer and Branch Manager shall confer to determine the scope of services required under this agreement, all in accordance with the terms and conditions of this document. The following considerations must be addressed:

Beverage or food category, flavors, containers and sizes, etc. Branches are advised that machines are generally set up to vend products of like container size and type, i.e., a machine will vend only 12 ounce cans or only 16 ounce plastics.

Vend price and percentage of commission

Incentives

The branch manager should meet with all approved vendors potentially service the branch to discuss the above considerations, to determine the service package(s) most advantageous to the branch. The branch will determine the number and location(s) of the vending machines. The branches' selection may include package(s) from one or more of the approved vendors. Exhibit B attached provides non-negotiable data under "a" and "b" above categorized by vendor and island (not included, to be worked out in the RFP process).

The third component "c." Incentives (defined as goods and/or services which are offered in addition to commissions, e.g., cash, computer, water jugs, etc.) may be offered by vendor(s) or negotiated by the branch. The branch may factor these incentive(s) into the decision-making process.

After final decisions are made, the branch must complete the "Implementation Agreement" (Exhibit C) and both branch manager and vendor must sign this form with the original sent to the HSPLS vendor coordinator, a copy retained at the branch, and a copy given to the vendor.

Collection of monies from the machine(s) will be arranged between the vendor(s) and the branch manager. Money left in the machine(s) shall be at the vendor's risk. Vendors are required to place a sign on each machine stating: "No monies remain in this machine overnight" regardless of the frequency of collection.

Section 15 Beverage Specification

The types of products to be offered can be specified in any detail desired here.

Section Food Specification

The types of products to be offered can be specified in any detail desired here.

Section 16 Miscellaneous Provisions

In the absence of a contract for service to an individual branch, the branch manager may request the HSPLS vending coordinator to permit the branch manager to make independent arrangements for vending services comparable to that authorized by these regulations. In such events, the branch manager and vendor shall adhere to all other provisions of these guidelines.

HSPLS shall have the right to inspect vendor's books, meter readings, invoices, and any other accounting documentation to verify sales and/or commissions in a reasonable and timely manner. Similar inspections of vendor's trucks, warehouses, and related equipment shall be accommodated.

Beverage vending machines shall be used to vend only non-alcoholic beverages. The branch manager shall have the discretion to ban caffeinated products.

All wrappings, boxes, etc., which are necessary to dispense vended products into machines shall be removed by the vendor from HSPLS properties and not deposited in any trash facility on HSPLS premises.

A record of cleaning, sanitizing, and maintenance shall be maintained by the vendor in each machine and shall be current at least for the last sixty (60) days. Copies of such records shall be made available to HSPLS upon request.

Area surrounding each machine shall be kept free of debris; trash, leaves, etc.

Each machine shall have a sticker on it informing the customer whom to call if they have problems with lost coin, damaged product, etc. The information on the sticker shall state that calls are placed to our office (exact information to follow when bid is approved). HSPLS shall then notify the vendor of the exact problem.

Section 17 Sample Schedule

March 27, xxxx Release of Bid

April 10, xxxx Prospective Vendors meeting and campus walk-through 9:00am. Meet in HSPLS Center, Room _____ on the campus of University of _____.

May 1, xxxx Bids due by 4:00pm to:

HSPLS
Attn: [name] [title]
[address]
[

May 4-15, xxxx Review of Bids

May 18, xxxx Award of Agreement

June 22-30 Vending Machines Installed

July 1, xxxx Agreement Commences

When this document is signed and submitted, this bid constitutes an offer to perform in accordance with the terms and specifications as stipulated herein.

The enclosed bid is submitted by:

(Company)

(Name and Title)

(Date)

Attachment "A"

Vending Machine Location

(Arranged by Island)

Branch Name, Address, Contact, Phone

Exhibit C Sample Vending Machine Implementation Agreement

This Agreement, executed on the dates indicated below, is effective as of _____, 200____, between _____ (branch) and _____ (vendor) for the items listed on "Exhibit B" and incentives to be offered to the branch library.

RECITALS

WHEREAS, the State and Vendor entered into an Agreement # _____ which describes which items will be allowed and what incentives have been offered and accepted, as follows: (Check and complete applicable lines):

___ 1. Items selected and allowed by HSPLS are circled and attached "Exhibit B"

___ 2. Incentives offered and accepted by the Branch as follows:

Vendor:

By _____

Print Name _____

Date _____

Branch Library

By _____

Print Name _____

Date _____

Appendix II-9b Potential Hawaii Snack and Beverage Vendors

Note there may be others. Not all vendors handle both snack and beverage.

Oahu

Acme Vending Honolulu 372-8900

Bottling Group, LLC (Pepsi) David Oshoka 484-1708

Coco-Cola Bottling Company 449 Mapumapuna Street Honolulu, HI 96819 Greg Mukai
<gmukai@na.cokecce.com> 839-6745

Hawaiian Isle Vending 2864 Mokumoa Honolulu, HI Nathan Ahern 833-2244 (vending machines at State Library)

Honolulu Bulk Vending Co 5 Sand Island Access Road Honolulu HI 841-7357;
headquarters: 58 Kuuala St Kailua, HI (808) 261-7553

Reliable Vendors Co Ltd 3705 Waialae Ave # 104 Honolulu, HI (808) 737-2232

CA Robinson & Company <<http://www.carobinson.com/>> Mainland: San Francisco 650
871-4280 Los Angeles (323) 735-3001

Tailor Made Vending Service <tailormadevend@aol.com> 2333 Alahao Pl suite C
Honolulu, HI 96819 Phone: (808) 843-8363 263-0156

Kauai

Bottling Group, LLC (Pepsi) David Oshoka 484-1708

Coco-Cola Bottling Company 449 Mapumapuna Street Honolulu, HI 96819 Greg Mukai
<gmukai@na.cokecce.com> 839-6745

Hawaiian Isles Vending 3920 Milikeleka Pl Lihue, HI (808) 245-5155

Honolulu Bulk Vending Co 58 Kuuala St Kailua, HI (808) 261-7553

Ron's Amusement Lawai, HI (808) 332-8229

Maui

Bottling Group, LLC (Pepsi) David Oshoka 484-1708

Akamai Vending Kahului, HI (808) 871-7195

Hawaii 3PO 1162 Lower Main (808) 244-3778

Hawaii Water Vending Kula, HI (808) 878-8363

Hawaiian Isles Distributors 851 Eha St Wailuku, HI (808) 244-5744

Lahaina Vending Co 365 Hololani St Makawao, HI (808) 572-0202

Luana Distributors 271 Palima Pl Kihei, HI (808) 250-1811, 874-1872

Star Ice & Soda Works 1162 Lower Main St Wailuku, HI (808) 244-3777

STO Amusement & Vending Inc 1787 Wili Pa Loop # 5b Wailuku, HI (808) 244-4045

Vending Stand M-3 State Bldg Wailuku, HI (808) 242-5667

Vending Stand M-7 Maui Meml 2158 Main St # 403 Wailuku, HI (808) 242-8850

Hawaii

American Vending 338 Naniakea St Hilo, HI (808) 935-2221

Bottling Group, LLC (Pepsi) David Oshoka 484-1708

Coco-Cola Bottling Company 449 Mapumapuna Street Honolulu, HI 96819 Greg Mukai
<gmukai@na.cokecce.com> 839-6745

D H Enterprises 1277 S Kumuwaina Pl Hilo, HI (808) 981-0087

Hawaiian Isles Vending 843 Leilani St # A Hilo, HI (808) 935-7176

J Morrison Co PO Box 733 Kealakekua, HI (808) 322-7355

Mauna Loa Vending 74-962 Lealea St Kailua Kona, HI (808) 329-6322

Oncue Billiard & Darts 74-5615 Luhia St # A5 Kailua Kona, HI (808) 334-0800

Pepsi-Cola Co Hilo 16-204 Melekahiwa Pl Keaau, HI (808) 966-4222

Rod & Co 205 Kekuanaoa St Hilo, HI (808) 961-4407

Molokai

Bottling Group, LLC (Pepsi) David Oshoka 484-1708

Coco-Cola Bottling Company 449 Mapumapuna Street Honolulu, HI 96819 Greg Mukai
<gmukai@na.cokecce.com> 839-6745