Sustainability Resource Toolkit
A Guide to Implementing and Sustaining School-Library Partnerships

Developed as part of an LSTA Statewide Student Success Initiative led by the Pacific Library Partnership

August 2018

www.plpinfo.org/student-success
This project was supported in whole or in part by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act, administered in California by the State Librarian. The opinions expressed herein do not necessarily reflect the position or policy of the U.S. Institute of Museum and Library Services or the California State Library, and no official endorsement by the U.S. Institute of Museum and Library Services or the California State Library should be inferred.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>2</td>
</tr>
<tr>
<td>Student Success Participants</td>
<td>3</td>
</tr>
<tr>
<td><strong>1 Measuring Success with Benchmarks and Milestones</strong></td>
<td>5</td>
</tr>
<tr>
<td>Benchmarks and Milestones</td>
<td>6</td>
</tr>
<tr>
<td>Things to Consider when Creating Metrics</td>
<td>8</td>
</tr>
<tr>
<td>Using Data to Tell a Story About Your Success</td>
<td>8</td>
</tr>
<tr>
<td><strong>2 Maintaining Relationships</strong></td>
<td>9</td>
</tr>
<tr>
<td>Communication, Communication, Communication</td>
<td>10</td>
</tr>
<tr>
<td>Tips for Maintaining Relationships</td>
<td>11</td>
</tr>
<tr>
<td>Establishing a Long-Term Plan in the Beginning with Stakeholders</td>
<td>12</td>
</tr>
<tr>
<td><strong>3 Continued Education and Marketing</strong></td>
<td>14</td>
</tr>
<tr>
<td>Continued Education and Marketing of Library Cards</td>
<td>15</td>
</tr>
<tr>
<td>Strategies for Continued Education/Marketing</td>
<td>16</td>
</tr>
<tr>
<td>Educator Cards</td>
<td>17</td>
</tr>
<tr>
<td>Branding</td>
<td>18</td>
</tr>
<tr>
<td><strong>4 Growing Partnerships</strong></td>
<td>19</td>
</tr>
<tr>
<td>Expanding into More Schools and/or Districts</td>
<td>20</td>
</tr>
<tr>
<td>When a school is a little hesitant...</td>
<td>21</td>
</tr>
<tr>
<td>Partnering with Other Organizations for Continued Success</td>
<td>22</td>
</tr>
<tr>
<td><strong>5 Descriptions of Mentor Libraries’ Initiatives</strong></td>
<td>24</td>
</tr>
<tr>
<td><strong>6 Case Studies from Pilot Libraries</strong></td>
<td>30</td>
</tr>
<tr>
<td>Pilot Library Participation Survey Results</td>
<td>31</td>
</tr>
<tr>
<td>Case Study Statistical Overview</td>
<td>32</td>
</tr>
<tr>
<td><strong>7 Supporting Documents</strong></td>
<td>134</td>
</tr>
<tr>
<td>MOU's, Technical Data, Information Sheets, Sample Opt-Out Forms, Sample Letter to School Superintendent</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

The Student Success Initiative was developed by the Pacific Library Partnership (PLP) and NorthNet Library System in 2016 with a cohort of 11 pilot and 4 mentor public libraries in Northern California to create collaborations between schools and libraries and provide public library cards for students. The project’s goal was to improve K-12 students’ access to public libraries’ digital and physical collections and strengthen student learning opportunities in California.

In FY 2017/18, the project expanded statewide. Nine mentor libraries, which have already established formal relationships with schools, were paired with 42 pilot libraries to assist them in development of their student success initiatives. Two Educational Services Coordinators (one in Northern California and one in Southern California) assisted both the mentor and pilot libraries through establishing and sustaining their initiatives. It takes approximately 18-24 months to create a Student Success Initiative, and libraries report that this project’s tools and resources have helped them navigate this lengthy process successfully.

The California Department of Education has signed on as a partner. Between last year and this year, over 759,000 Student Success cards have been issued. The project has been presented at the California Library Association Conference in Riverside and the Public Library Association conference in Philadelphia.

The Implementation Resource Toolkit: A guide to Implementing School-Library Partnerships was created as part of the Student Success Initiative. You may find a copy of that report, as well as other resources, at www.plpinfo.org/student-success.

This Sustainability Resource Toolkit: A guide to Implementing and Sustaining School-Library Partnerships represents what we have learned in the last year and includes best practices, Memorandum of Understandings (MOUs), introductory letters and marketing which can be duplicated, as well as case studies from the libraries about their efforts throughout the year.

The alignment between libraries and schools is strong, with each focusing on providing educational resources to students to achieve. We hope that you will find this Toolkit useful in creating your own initiative.
EXECUTIVE SUMMARY

This Student Success Sustainability Toolkit represents a culmination of work of 51 public libraries within California to establish and expand their relationships with schools to create partnerships for library cards for students.

The Student Success Initiative is funded through an LSTA grant through the California State Library. In FY 2017/18, it became a statewide initiative, recognizing that libraries want to work together in providing solutions to not only provide library cards for students, but to share best practices to sustain and grow those relationships with schools.

This project supports national initiatives to provide school children with library cards. In April 2015, President Obama’s ConnectED Library Challenge called on libraries to work with mayors, school leaders, and school librarians to create and strengthen partnerships so that every child enrolled in school can receive a library card. With the new administration, the ConnectED Challenge lost support, and the Urban Libraries Council picked up the momentum and developed the Leaders Library Card Challenge.

PLP’s Student Success Initiative, like the ConnectEd, the Leaders Library Card Challenge, as well as other initiatives in other cities and states nationwide, supports these collaborative efforts between libraries and schools. In California, the potential exists for us to be the first state to achieve the audacious goal of having at least 75% of its youth with a public library card.

In California, there are over 8,000 K-12 public schools, and over 1,000 public libraries. According to the California Department of Education, the ratio of teacher librarians to students is 1:7,187 (FY 2014/15), an average school library collection size is about 13,000, and quite often, schools have few or no databases available to them at school. Public libraries are able to fill the gap, be safe places for students after school, provide homework help and resources, and help prevent summer learning loss.

In using this Student Success Sustainability Toolkit, we hope that you will find inspiration in the case studies and practical ideas in the sections. Each library has built their initiative based on the needs of their community, and you will find rich reading in the case studies. Some of the names of their branded library cards include Student Asset Card, SMA+RT Card, STAR Card, KinderGo! and Connect Code. If you want more information, please visit our website, www.plpinfo.org/student-success.

Carol Frost
CEO, Pacific Library Partnership
August 2018
STUDENT SUCCESS PARTICIPANTS

Pilot Libraries
Alameda Free Library
Altadena Library District
Arcadia Public Library
Beaumont Library District
Benicia Public Library
Burlingame Public Library
Calabasas Public Library
Camarena Memorial Library
Contra Costa County Library
Daly City Public Library
Dixon Public Library
Escondido Public Library
Folsom Public Library
Huntington Beach Public Library
Livermore Public Library
Los Gatos Public Library
Madera County Library
Menlo Park Public Library
Monterey Public Library
National City Public Library
Nevada County Community Libraries
Orange County Public Library
Palo Alto City Public Library
Pleasanton Public Library
Redondo Beach Public Library
Richmond Public Library
Redwood City Public Library
Sacramento Public Library
Salinas Public Library
San Bruno Library
San Diego Public Library
San Leandro Public Library
San Luis Obispo County Library
San Mateo City Library
San Mateo County Library
Santa Barbara Public Library
Santa Cruz Public Library
Solano County Library
South San Francisco Public Library
Sutter County Library
Thousand Oaks Public Library
Yolo County Library

Mentor Libraries
Chula Vista Public Library
Los Angeles Public Library
Marin County Library
Napa County Library
Ontario City Library
San Francisco Public Library
San Rafael City Library
Shasta County Library
Woodland Public Library

Pacific Library Partnership Staff
Carol Frost, CEO
Yemila Alvarez, Assistant Director
Katie Leach, Educational Services Coordinator
Emily Meehan, Educational Services Coordinator
Map of Student Success Initiative Participants

Blue = Northern CA pilot libraries
Purple = Southern CA pilot libraries
Red = mentor libraries
Measuring Success with Benchmarks and Milestones

We suggest that if you haven’t yet established a student success initiative you take a moment to read the Implementation Resource Toolkit: A Guide to Implementing School-Library Partnerships was created as part of the first year of the Student Success Initiative. You may find a copy of that report, as well as other resources, at www.plpinfo.org/student-success
BENCHMARKS AND MILESTONES

**Benchmarks:** Benchmarks are *quantitative* metrics that measure the outcomes of a student success initiative. They are a standard or point of reference against which things may be compared or assessed. Think of benchmarks as mile markers on a trail. They help you measure with data how far you've gone by establishing a baseline of service or services to measure against.

**Milestones:** Milestones are *qualitative* metrics that provide a roadmap to success. It marks significant changes in development. Think of milestones as landmarks on a trail. They tell you when you've reached a significant point in your student success journey.

Creating metrics and measuring the success of a Student Success Initiative are important parts of moving a project forward and sustaining it. It gives a library a roadmap or a vision to follow (milestones) and a way to assess your progress (benchmarks). If you think of your student success project as a journey (as shown in the image above), the benchmarks are like the mile markers you encounter on a trail while the milestones are like landmarks. Benchmarks tell you how far you've come with numbers (or data), while milestones tell you when you've hit an important step on the journey. Not only is the creation of metrics an important step in planning a student success initiative, it also reminds stakeholders of the vision and impact a library is making. Metrics are not meant to be static and will change overtime. They will evolve as your student Success Initiative grows and expands.
Below are example benchmarks and milestones. This list is a sample and not meant to be exhaustive or prescriptive. Your library may think of metrics that are not listed. You should spend some time reflecting on your stakeholders, library and community to determine what metrics will best measure your success. Remember, they will evolve and change as your student success initiative progresses.

Example benchmarks

- Library staff conduct X-number of visits and presentations to schools annually
- X-number children currently have library cards
- Library currently partners with X-number schools in service area
- X-number children participate in library’s summer reading program annually
- Library issues X-number new cards to children annually
- Library circulates X-number of children's materials annually
- X-number sessions on library homework help databases
- X-number teachers subscribe to library’s Teacher Newsletter
- Library currently partners with X-number community groups to support student success

Example milestones

- My library has identified one or more key persons with the school or school district.
- My library has held one or more meetings and has communicated the goals of this project.
- My library staff are aware of this project and I have formed a team to work on this project. We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc.
- My library has created a timeline for this project, and is flexible, knowing that dates might shift.
- My library has identified what level of collaboration we will be able to do with the schools regarding issuing and sharing data (such as using the student ID numbers, how to issue the cards, etc.)
- My library has analyzed/audited my community and outlined a path to success.
- My library has created MOU with the district.
- My library has considered and identified steps to protect the privacy of student data.
- My library has created a marketing strategy to support this project.
- My library has a clear plan for implementation and distribution of student success library cards.
THINGS TO CONSIDER WHEN CREATING METRICS

- Spend some time looking at your ILS to determine what type of data you can collect. What information are you currently collecting for statistics? What information do you want to begin collecting for statistics?
- Make sure to think through privacy concerns and anonymize any data collected.
- Be flexible! Metrics should be fluid and will change as your student success initiative evolves.
- Are there any community goals you can support with your program? Create some metrics that align with those goals. Create a big picture vision and create your milestones with that vision in mind.

**TIP:** Perhaps your library supports the Campaign for Grade Level Reading with the goal of every student reading at grade level by third grade. When students have library cards, they have access to free books that support this community goal. You could measure usage of kindergarten through third grade students that have the Student Success Cards and link usage with demonstrated support.

USING DATA TO TELL A STORY ABOUT YOUR SUCCESS

Consider using the data collected from the metrics to tell a story about your student success initiative. It is a compelling way to leverage support. Sharing the impact of your program with data strengthens what we already know to be true: Student Success Initiatives support student learning and communities. As your partnership with schools grows, you can use the data to strengthen and sustain support from your stakeholders.

**TIP:** Find the number of youth in your community, compare it to the number of youth who currently have library cards and tell a story about how many more youth could have access to resources in your community through a student success partnership.

**EXAMPLE:** The Solano County Library developed a mobile library, bringing materials directly to students once a week. Statistics collected show that 100% of students who have a card have checked out at least one book. This data is compelling and shows the impact that library cards are making at the school. You may even use this data to approach new school districts and partners, using it as an example of how your student success initiative can be a success.
2

Maintaining Relationships with Stakeholders
COMMUNICATION, COMMUNICATION, COMMUNICATION

Communication is key to maintaining relationships with your stakeholders and to sustain your Student Success Initiative for years to come. This includes connecting with key stakeholders that you work with to establish the Student Success Initiative and extends to the ongoing communication needed with staff, parents, students and teachers. Consider creating a communications plan with each of your stakeholders in mind.

**School administration** These are the people who are supporting your program at the top level. Checking in with these stakeholders is important to maintain and grow your support. After you have an established Student Success Initiative, occasionally reaching out to see if they need anything or to share a success story is a good way to maintain communication.

**Teachers** Communicating with teachers about the resources that are available to their students is essential. Consider creating a teacher newsletter to keep them informed of educational resources and programming.

💡 **TIP:** Some libraries have created a teacher card in addition to the student success card. This allows teachers to have a part in the student success initiative in a tangible way and to experience the resources their students have access to.

**Students** After you establish your Student Success Initiative and distribute the library cards, you should continually educate your students on the resources they can now access. Create a marketing strategy to creatively reach out to students throughout the year. Remember to re-engage with students before and after summer break. See "Continued Education and Marketing of Library Cards" for more examples.

**Parents** Consider how you will communicate and build trust with parents about your student success initiative. For some of you, one of the most important pieces of communication will be the opt in or opt out forms in the registration process. This will alert parents that their child will be receiving a library card. Sending follow up information on how their child can use their card to succeed in school can help parents encourage use of the card at home. It can also encourage an entire family to come into the library to get cards.

**EXAMPLE:** San Rafael Public Library reported a slight increase in library card applications for adults that correlated with their student success initiative.
**Community stakeholders** Community stakeholders could include Parent Teacher Associations, School Boards, City Councils and community organizations. Community stakeholders can be important supporters of your student success initiative. Furthermore, it reflects positively on the library and demonstrates the essential role the library plays in the educational landscape of your community.

EXAMPLE: A community member in Shasta County spoke at a city council meeting in support of the library. They used the student success initiative as one of the examples of impact when advocating for continued financial support.

**TIPS FOR MAINTAINING RELATIONSHIPS**

- Make a list of contacts at each level. These may include school board contacts, superintendents, principals, teachers, librarians, students, and parents.
- Check in with your contact person multiple times a year, even if you don't have any action items. This maintains the relationship, opens communication to grow your partnership, and alerts you of staff changes.
- Make sure to have other contacts at the school in case your main contact person leaves.
- Share successes with your stakeholders. This could be a narrative of a student who is using the library or data you've collected.
- Consider recognizing your stakeholders publicly for their collaboration.
- Create a communications plan keeping each stakeholder in mind.
- Attend professional development meetings to connect with school library staff and teachers.
- Make a link between student success and library usage.

EXAMPLE: Pleasanton Public library set-up a feedback loop to keep students engaged and learn more about the library services.

EXAMPLE: Salinas Public Library created a teacher resource on their website to direct class visits, receive materials requests and get assignment alerts.
Establishing a Long-Term Strategic Plan in the Beginning With Stakeholders

To create a lasting and sustainable program, consider creating a strategic plan. Creating a strategic plan helps your library see the big picture, stay on track and maintain momentum. It's important to create a plan that is flexible and allows for the evolution of your program. Consider including some of your stakeholders such as a school administrator or a school librarian in this planning. Having the perspective of the school can give insight into their goals and what will work for them. It may also create buy-in and a partnership built on mutual input.

As we've seen in other libraries, when key staff members leave or change positions, the project can stall. This is also true for our stakeholders. In year one, one of our pilot libraries had made significant progress on their student success project. Near the end of the school year, a new principal was hired, and the library had to start back at the beginning with building relationships and creating buy in. This story is not uncommon, and we've learned that staff changes can be a challenge.

However, when a long-term plan is in place, it makes transitions in staff members much smoother and helps your student success program stay on course no matter what staff changes occur. Furthermore, having a strategic plan will help you sustain your project long term. After the initial build up and set up, the question is often, "what now?" The long-term thinking will help you maintain momentum and help the students in your area make the most of their student success cards. It's not just about getting library cards in the hands of students, we want them to use them and that requires an ongoing effort.

Part of your long-term plan should include measuring your success and reporting your success to your stakeholders. Refer to the section on metrics to determine how your library will measure your success. Next think about how your library will communicate and report on that success. Below is a list of elements you may want to include in your strategic plan. Some of these elements may not work for your library and schools and you may come up with other important things to include. For a sample strategic plan, see "Shasta Public Libraries Student Card Strategic Plan" in Section 7, Supporting Documents.

☝️ Tip: Shasta Public Library's Educational Services Librarian created a 5-year strategic plan to help as she navigated their county's complicated educational system. When she moved on to her new job, the person who took her place was able to get a clear idea where they were in the process and what the next steps were. It also helped continue the momentum with the schools as they were aware of the plan and were not relying only on a key staff member.
Elements to include in your strategic plan:

- Snapshot of where you are now. Include current statistics of how many youth currently have cards and any usage statistics that you can collect.
- Big vision. Where do you hope to be? This will most likely change over time. Make a list of schools in your community that could potentially join the student success initiative.
- List your primary and secondary goals.
- Outline a workflow and staffing needs.
- List any processes you have for data transfer.
- Create a communications plan with all stakeholders in mind (school staff, library staff, students, parents and community members).
- Do you have a plan for expansion and growth? (i.e., educator cards, private schools or homeschools?)
- Identify your metrics and how you will measure your success.
- List any current or potential funding.
- A plan for sustainability that includes ongoing communication and data transfers.
- Create a list of foreseeable challenges and a plan for success.
3

Continued Education and Marketing
CONTINUED EDUCATION AND MARKETING OF LIBRARY CARDS

So, you’ve successfully delivered library cards to students at a local school. Now is definitely not the time to deem your project complete and drop all communication from the school! Not only is it imperative to make sure that teachers, students, parents, etc. know how to use their new library card, what privileges they receive with it, and how it may or may not be different from regular library cards, but also to make sure that this information is routinely given to them. Otherwise, the new library card will just be a piece of plastic that sits at the bottom of a student’s backpack.

As was stated in the Maintaining Relationships section, continued communication with all levels of stakeholders is key to the long-term success of your entire student card program.

Reasons to continue education and marketing:

1. Reminds students, teachers, and parents of the value and benefits of the student library card, and many ways to use it.
2. Promotes specific resources (i.e. research databases or online tutoring services).
3. Informs people about your library beyond what the student cards have to offer.

TIP: Section 7, “Supporting Documents” includes marketing examples.

Strategies for Continued Education/Marketing:

There are a variety of different direct and indirect ways to educate students, teachers, and parents about student cards. It is a good idea to employ your strategies on a regular basis, such as sending out quarterly announcements to parents, coordinating yearly workshops with teachers, or weekly social media posts.

DIRECT

● Class visits by librarian - talking about the cards when the students receive them serves to inform them of the basics of card use, while visits afterwards may be useful for promoting other library resources and programs.
● Class visits the library - this is helpful so the students can know where the public library is in their neighborhood or town, and they can experience library resources firsthand.
• Librarian presents to teacher or parent meetings
  ▪ Making sure teachers and/or school librarians know the various resources available with the card is especially important when the goal is for students to use their card for academic purposes. Workshops and trainings that explain your library's educational resources may be very helpful.
  ▪ Parents are another group that should know the resources available with a library card, especially with younger children. Often, parents are the ones to remind their children to use outside resources and receive tutoring for school.
  ▪ If your library allows marketing, consider sending either emails or letters to parents and students with information on services they receive with their card.

EXAMPLES OF STUDENT PROMOTION: The Woodland Public Library’s teen council presented to the County Superintendent the proposal for the initial student library card for its approval. San Francisco Public Library’s local teens helped to create a video PSA for other students on how they can use their “Scholar Card.” Yolo County Library is partnering with high school art classes to design their own student card.

INDIRECT

• Utilize your K-12 patrons! Having students help promote the use of their new library cards is an effective way to market the library card.
• When issuing your student card, include a one-page sheet on how to use it. See Section 7, Supporting Documentation, for examples.
• Social media posts about the student card
• Linking to public library resources and providing student card information on school website
• Posters put up around school and in classrooms to promote student card use

💡 TIP: It is helpful to have a landing page on your library website about your student library cards. Teachers, parents, and students can be directly taken to any and all information they may need to know about using the card if the link is posted to the school website.
Tips on how to make the most of the student card included in school newsletters, student planners, etc. You can work with the school to have regular email blasts with tips included in their newsletters and announcements, and have the tips included in next year’s student planners.

Connect with educators to incorporate library resource use into their curriculum. You may directly explain how to use educational resources to teachers or school librarians, and they, in turn, can incorporate that knowledge into their lesson plans.

Coordinate with school office or administration so they are able to get your marketing and educational materials to the right places where your audience will be most likely to view them.

**EXAMPLE:** Sacramento Public Library staff were able to present on their Student Success Library Card to over 1,200 teachers within the Sacramento City Unified School District during their new curriculum training over the course of four weeks.

**Educator Cards**

Several libraries have reported that obtaining teacher support for student library cards is essential to the success of their program. Teachers are the ones who can encourage their students to use library resources for schoolwork. Therefore, many libraries have developed educator card programs in tandem with their student success initiatives. This can help school staff become familiar with your library’s educational resources so they can pass on that knowledge to their students and incorporate into their curriculum. You can also give special privileges with an educator card to allow for prolonged classroom use of items.

**EXAMPLE:** The Los Angeles Public Library system allows teachers with their Teacher Card to check out up to 50 items instead of the regular 30, and to have the items for up to 16 weeks. The San Francisco Public Library lengthens borrowing time and allows multiple copies of the same book to be checked out by teachers so they can have a class set.
Even if your library cannot make these adjustments for teachers, giving school staff their own library card can not only help them to learn about library resources, but also strengthen your library's relationship with educators. If possible, you may want to discuss including teachers in your student data pull, or establishing a library card drive at a teacher meeting or professional development workshop.

BRANDING

While naming your student library card or Student Success Initiative is not necessary, it does help to build name recognition around your card. Many libraries use the name "Student Success" to get their message across, while others come up with their own names. Having your card design and branding be distinct from your regular cards can serve to make it something special you can put in the hands of your local students and build an awareness of it in your community.

Here are some creative examples of student library card and project names from our participant libraries:

- **Connect Code** – Alameda Free Library
- **My First Library Card** – Folsom Public Library
- **Student Asset Card** – Palo Alto City Library
- **SMA+RT Card (Salinas Makes A+ Readers Together)** - Salinas Public Library
- **Student OneCard** – Sonoma County Library
- **STAR Card** – Yolo County Library
- **1-2-3 Grow with Me** – Beaumont Library District
- **REAL Card (Read, Explore, Achieve @ Your Library)** - Chula Vista Public Library
- **KinderGO!** - Ontario City Library
- **Planting seeds – growing mighty readers** – Thousand Oaks Library
4

Growing Partnerships
EXPANDING INTO MORE SCHOOLS AND/OR DISTRICTS

Most libraries wanting to establish a student success initiative start out small with only one school, one district, or even one grade. Many libraries, however, have more schools and districts in their service area that can benefit from student library cards. Libraries can be strategic about the method in which they approach other schools and how they design and implement their additional student success initiatives.

Below are some important considerations for growing your partnership:

- **Evaluate** if your library is actually ready and capable of adding another school/district to your initiative. Consider your manpower, financial situation, and the overall process of completing one school or district. It may be too taxing on your library’s resources to add another school district now, but you can start planning to add it in the future. It helps if you have completed distribution of cards to one school or district before adding more because you will only have to worry about incoming students at those schools rather than the entire student body, making it easier to manage your new schools. If you do have the resources to add another school district, organization is key here to making sure they are incorporated into your initiative smoothly.

- **You may need to reframe the program’s model when expanding to a different school or district.** For example, if the big selling point for your student library cards is to utilize online resources only as an e-card, this may not translate as well to an elementary school district. The same goes for a “kinder-card” type program, the amenities of which would not translate well to high school.

- **Typically, if you have piloted with one school, it is easier to reach other schools within the same school district.** For example, one MOU can be used for an entire district, taking a lengthy step out of achieving student data imports. The expansion may be easier or harder depending upon specific needs of the new district.

- **If you are planning on importing student data into your ILS, it is worth considering the other district’s student data format, which may be different than the current school’s information.** This may require more time to work with IT staff on both sides to figure out how to make student data importing happen, if desired.

**TIP:** Section 7, “Supporting Documents,” includes example letters to schools and school districts.
WHEN A SCHOOL IS A LITTLE HESITANT...

A big challenge is when a new school or district is reluctant to join your efforts, particularly if your library is issuing student cards via student data import into your ILS. The potential of releasing information of minors is something that education administrators and parents do not take lightly. Below are tips on successfully partnering with a new district:

**TIP:** Most libraries, to be in compliant with FERPA, work with schools to include an opt-in or opt-out form in the back-to-school packet. Section 7, “Supporting Documents,” includes example forms.

- Schools must comply with the Family Educational Rights and Privacy Act (FERPA). You can read up on it here: [https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html](https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html)
  Explain as clearly as possible what student data is needed for a library card (directory information, or “not harmful” data) and how libraries handle privacy and confidentiality. Many do not know that public libraries value the right to privacy and take great measures to keep individual information safe from others. It is important to make these distinctions clear right away to alleviate or prevent any fears.

- You may be able to scale back the amount of data needed for a data import if your library still wants to pursue that model and if both parties agree. Instead of receiving most pieces of directory information, you may be able to only import select fields. Discuss with your technical staff and your ILS representative the minimal information that is acceptable to create a new patron record.

- Show off any success you have had with your other partnerships. This can be demonstrating statistical success or showing a sample formal agreement (either from your own partnerships or from this toolkit!).

- Finally, if data import is just not an option for a school or district, you may need to adjust your model entirely to fit the district’s comfort levels. For example, the school might allow library card applications to be in registration packets. Be flexible and patient with other districts as you move through the process.
If a school or district actually gives you a “no” to joining your Student Success Initiative, do not despair! Of course, this is never what you want to hear, but sometimes it just isn’t the right time for that school or district. Don’t take it too personally, stay positive with the schools and districts you already have on board, and know that the more success you have with these other schools or districts will make others want to join the fun! This is another reason why metrics are so important – you can show off successful data to other districts who seek visible and statistical proof that your student success initiative is a success.

PARTNERING WITH OTHER ORGANIZATIONS FOR CONTINUED SUCCESS

Expanding your program does not have to mean adding other schools and districts to your initiative. As your student success initiative grows, your library may find outside organizations that can help support, promote, or add to it in a unique way. Building this outside support can increase the longevity of your program as now others will have a stake in your initiative.

- Afterschool/Summer programs - connecting with your school’s afterschool and summer programs may elevate what you already have established at the school. They are great outlets for promoting your student cards, either by distributing straight to these groups or providing programs directly to them so students can experience their public library.

- County Board of Education - successfully connecting with the members of the County Board of Education has the potential advantage of making your student success initiative a county-wide program. Their buy-in to library cards for all students will give your program legitimacy when approaching new school districts.

- Local education initiatives and nonprofits - many cities have early literacy and education initiatives with goals of raising reading levels or test scores amongst children and promoting college readiness. The public library can play a role in this with its resources and the initiatives, in turn, can put support behind student library cards for all.

- Alternative education schools – These institutions typically have underserved students but may present more or different barriers to establishing a student card program. It is best to have a well-formed relationship with administration and be familiar with any perceived barriers to make this happen.

EXAMPLE: Orange County Public Libraries is choosing to focus solely on alternative schools, including juvenile halls, for their Student Success Initiative.
Government employees outside the library – it is one thing to get your whole library staff on the same page for your student success initiative, but a whole other ballgame to involve your whole city/county/district. Making your program a local government-wide initiative (instead of being solely propelled from the library) serves to not only further legitimize your library's actions but can spread out some of the heavy lifting needed for these programs by involving different city/county/district departments.

EXAMPLE: Ontario City Library utilizes other city employees for its "KinderGO!" program every year. These employees deliver the library cards and read a picture book to local kindergarten classrooms.
5

Descriptions of Mentor Libraries’ Initiatives
DESCRIPTIONS OF MENTOR LIBRARIES’ INITIATIVES

The nine mentor libraries played a key role in the Student Success Initiative. Some of the libraries were part of Year 1 as pilot libraries and completed their initiatives that first year. Others were libraries that were independently establishing these relationships with schools and wanted to share their experiences and successes. We asked them to provide highlights of their programs.

CHULA VISTA PUBLIC LIBRARY OVERVIEW

In July 2016, the school librarian from Chula Vista Middle School met with our Otay Ranch Branch Manager, Joy Whatley, and expressed interest in partnering with the Chula Vista Public Library in order to provide her students access to the Public Library’s online resources. The school librarian was able to provide an Excel file of all the middle school students, their ID numbers and their first and last names. Student cards were activated in September 2016.

Chula Vista Public Library’s ILS is Innovative Interfaces Sierra. Our patron records are in a MARC-like format. To create the student barcodes we append the first 4 digits of our library barcode with 3 zeros and the 7 digit Student ID #. The number of zeros relates to creating a barcode of a consistent length. At Chula Vista Public Library all barcodes start with 2365 and are 14 digits long. You should confirm that the newly created barcode numbers do not overlap with your existing ranges of library barcodes.

Students will have in-home and at-school access to our digital resources including databases, live online tutoring, e-books, e-audio books, and e-magazines by entering the Chula Vista Public Library card barcode prefix 2365000 plus their Student ID number. Based on the newly created Student Patron Type students will only be able to check-out digital resources.

Since the Student Library card isn’t really an actual separate card and does not provide the same privileges, there is no conflict between students with existing library cards. To check out physical materials students need a regular Library card which requires a parent or guardian’s signature and consent before the card is issued. When using our online resources students can enter the barcode 2365000 plus their Student ID Number or, if they have a regular Library card, they can use that barcode.

Within our ILS the Student Cards all have the same P-Type, their address is the name of the school, and the Expire Date relates to the expected number of years to graduation. Because the school was not able to provide more detailed information about each student and our system required a Birth Date field we gave them all the dummy date of 9/1/1950. Our library accounts are purged two years after the Expire Date.
LOS ANGELES PUBLIC LIBRARY OVERVIEW

Our school system is the LA Unified School District, which is HUGE and labyrinthine in its structure and organization. We’ve had plenty of contact at the local level (between branches and schools) and also with various departments at an administrative level ranging from curriculum development to media labs. However, it was our Mayor’s Office that gave us the introduction to the Student Health and Human Services department, which is the department with which we’re working on this partnership.

With the Student Success Library Card, students will get full access to all our digital resources, plus will be able to check out 3 books at a time (no AV) with no fines or fees, even if the book is lost.

We were very worried that we wouldn’t get LAUSD (or rather, its lawyers) to agree to share student data with us in order to create the library cards; this turned out not to be a problem. However, working out a procedure for getting all the data for kids who opt in to get a library card (as opposed to those who don’t want one) is proving difficult due to the way LAUSD updates student records. It will be easier if we can convince the lawyers to do an opt-out – that way, we’ll get every record automatically, except the hopefully few that have opting out. I suspect that we’ll have plenty of technical challenges – and of course, once the cards are issues, we have to entice kids to use them!

We will be issuing the first cards (to incoming Kindergartners and other incoming students) in Fall 2017. The numbers may be lower than hoped for if we must stick with opt-in. We are using the # of cards issued, circulation and database usage, awareness of library services to measure success. Our advice is to be flexible! Initially we were hoping that LAUSD either had or would agree to implement a universal id that could be used as library cards, but that appears to be several years out – so we decided to create a special card and get the data from LAUSD.

MARIN COUNTY FREE LIBRARY OVERVIEW

Marin County Free Library has developed the student library card program with three small districts. They have an agreement in place with the Novato School District, the largest district in the library’s service area, and are working on the program. They are not using the school ID as not all students have unique IDs. Sara Jones, director, thinks that the size of Marin County and the various school districts in her service area – fairly small compared to other parts of California – makes it easier to implement this program.
**NAPA COUNTY LIBRARIES OVERVIEW**

To initiate contact with the school system, we were fortunate that the Director of Libraries for NVUSD used to be on the Library Commission, and the NCL Assistant Director’s wife works in the PIO office of NVUSD. However, the library and the school district have a long history of working together, at least on large initiatives. We also work closely with the Napa Office of Education. Because we are a small county, 133,000 population- we tend to actually talk to each other, see each other at events, and serve on each other’s committees, boards and interview panels.

The student ID card will serve as a library card and will have full digital access and be able to check out 5 items with it. If they already have a library card, we will merge the accounts. The time frame was quick from planning to implementation. We chatted in the spring, then worked on the technical stuff, then went to school board for approval and we are getting ready for school registration in August.

The metrics we are using to determine success include activation rate, use rate, as well as some other data points to be determined. We are still looking into this. We are working on what data our ILS can pull. We are thinking of making a Student category that we could then pull out for statistics.

**Ontario Public Library Overview**

Ontario City Library’s service population is a very diverse community that is largely Latino and bilingual. Much of the community is low to mid income faith-based families. The community is active in local events and is technology forward thinking. Ontario is both made up of both commercial and residential areas.

Ontario City Library sets up a classroom visit for every kindergarten class in Ontario – across multiple school districts. We communicate through email and phone calls to both the district offices and the principals of each school sites. Ontario employees (from all city departments) visit the classrooms, read the selected book for the year’s project, and bring the kids their KinderGo bags. In the bags are the wallets and a library card. Ontario City Library maintains a strong partnership with the school districts, but there is no contractual agreement between OCL and the school districts.

During our KinderGo visits to the schools, we bring a library card to each Kindergartner. The library cards have been entered into our system for statistical purposes, but the customer info of the card is blank. When the child comes to the library to use his or her library card for the first time, they must “activate” the card. It’s at that point the circulation staff complete the
account information, including having the parent determine the technology access allowed on the card. Once the card is activated, the Kindergarten has full use of their card.

Ontario City Library’s library card initiative has been promoted under the name “KinderGo” since the start of the program 3 years ago. All marketing bears the KinderGo logo (along with the city and library logo). The marketing theme changes year to year based on the book selected to be read at the class visits. The selected title is read in all the class visits so the Kindergartners can connect with one another over the same book. This portion of the program is called KinderReads. We also put on a KinderFair, a community resource fair for Kindergartners and their families at the conclusion of the program. There are activities for children, entertainment, and community vendors that help support the KinderFair. Schools are also provided with a KinderGo banner to help familiarize families and students with the program.

San Francisco Public Library Program Overview

Our Children, Our Families Council is a cooperative initiative between the City of San Francisco and the San Francisco School District initiated by a ballot measure approved in November 2014. Leveraging City and School District assets to serve families effectively is a high priority and is the backdrop for the Library/School effort. San Francisco Public Library (SFPL), like many public libraries, accepted the White House ConnectED Challenge. SFPL and SFUSD Leadership met with a shared vision - a library account for every student.

The Library (as a city agency) and School District have agreed to share student directory level data (name, DOB, address, phone number) so that the library can use the individual student ID as the unique identifier to create a new patron type. This is a virtual card that allows students to access digital resources that the Library provides. The student will be able to “upgrade” this virtual card to a full-service card upon visiting the library. If the student had a previous card with fines or fees that were blocking his/her use of the card, those fines and fees will be waived. The Library anticipates 57,000 new cards which represent students in public schools only. The Library plans on offering a similar program to private schools in the future. The program is called The Scholar Card.

The library’s biggest challenge is getting the word out to students, parents and teachers. The Library is trying to determine a time of year or event that would create visibility for this great opportunity for students. 70% of the public schools have “family liaisons” who serve as community advocates for students and families and have been very supportive of the library card initiative.

In years leading up to the Scholar Card initiative, the library partnered with the SFUSD Teacher Librarians and kindergarten teachers to lead a library campaign for all kindergarteners in either Fall or Spring. We’ve tried a few different approaches and reach about 50% saturation.
Shasta Public Library Program Overview

This initiative began several years ago and is a priority of elected officials at city and county levels. The goal is to work with all schools for students in all grades. The Library is now working with about one-third of the schools and others are eager to join the program. Information is included in parent handbooks that notifies them that their student will get a card unless they opt out of the program. Students are issued full-service cards with no fines and fees and there is an annual clean-up of any duplicate cards. The Library creates the cards based on student data and delivers the cards to the schools.

One of the biggest challenges is Library staff capacity to handle this program. The use of a virtual card would reduce workload significantly but the community was interested in full-service cards. One of the biggest benefits of the program is that library staff have an opportunity to train students and teachers about library resources. An employee serving as a Teen Services Librarian left recently and the position has been reallocated to serve as an Educational Services Librarian to focus on school training and coordination. The Library is still dedicated to a Teen Services program as well.

The Library has seen a robust increase in the utilization of its e-resources, particularly online homework help. They are concerned that this increased usage will impact the cost of the resources because those costs are based on service area population as well as amount of use.

Woodland Public Library Overview

Woodland has partnered with their school district to give every enrolled student online access to library resources. Woodland Joint Unified School District services the communities of Woodland, Knights Landing, Yolo and Zamora. They have been successful in getting their school district to work with them by having the Teen Advisory Board members advocate for the Student Success card by speaking about it at school district meetings.
6

Case Studies from Pilot Libraries
PILOT LIBRARY PARTICIPATION SURVEY RESULTS

At the end of the grant, the pilot libraries were asked to complete a survey regarding the Student Success Grant. Below are the results of that survey.

- 90% had reached at least half of the milestones they identified
- 20% completed their initiative
- 44% partially completed their initiative
- 34% did not complete their initiative
- The majority of those still working on completing their initiative plan to have it completed within the next year

What was the most beneficial part of the grant?
The surveyed libraries universally answered that the collaborative environment and resource sharing aspects were instrumental to getting ideas and support for their projects. Some comments were:

- Collaboration with other libraries in the program.
- Shared resources - being able to model MOUs and data agreements off our others' examples and learning from the conversations others had with eResource vendors.
- Basecamp discussions; having a mentor
- Being able to talk about the project as a "statewide initiative." Having a lot of other libraries working on the project made our schools eager to jump on board.
- Instruction, support, and information imparted at our Meet-up! I'm so busy at work that I don't have time to review the site, so the Meet Up was a wonderful way to bring us all together and let us focus on our needs!

What would you change about the grant?
The responses were mostly focused on the aspect of time. Several responses mentioned that more time to meet and collaborate would be helpful, as would earlier access to information on technical aspects of sharing library cards. Some comments were:

- Keep the funds coming, a great incentive and helps the whole process move more smoothly/efficiently.
- I'd love to see more pieces about marketing the benefits of the library to parents and high school teenagers. Getting cards set up with all students is a big challenge, but it's only step one.

94% of the libraries indicated they would be interested in participating next year.
CASE STUDIES TRENDS AND SUMMARIES

The pilot libraries were sent surveys asking them to describe their library, the kind of partnership they have with schools, and where they were in the process of developing their programs. Below is a summary of the results of the case studies.

Total student success library cards issued by 2016-2018 participating libraries: 759,169

52% of pilot libraries are giving full access cards to students.
29% of pilot libraries are giving limited access cards to students.
16% of pilot libraries are giving internet only cards to students.
3% of pilot libraries are trying to determine what level of access they will give students.

48% of pilot libraries have eliminated overdue fines for student success cards.
35% of pilot libraries have fines for student success cards.
16% are undetermined and considering changing their fine policy.

39% of pilot libraries use the student ID to identify students in their ILS.
26% of pilot libraries use the patron type to identify students in their ILS.

34% plan to distribute no library cards to students – the Student ID is the library Card
39% plan to distribute cards through class visits, school tours or through school staff.
13$ are undecided.

58% of pilot libraries have an informal agreement with the school/s.
42% of pilot libraries have a formal agreement (MOU/MOA) with the school/s.

47% have already implemented their initiatives.
38% plan to implement within a year.
15% think it will take more than a year.
Have you thought about or created any marketing or branding?
Most libraries are using various strategies to market and brand their programs. Some examples collected from the case studies are creating a catchy name and logo, brochures, class visits, flyers, posters and bookmarks.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
Libraries are using a range of tools to educate students about the benefits of their library card. Many are using bookmarks, posters, emails, class visits and videos. One library disclosed that an effective way they educate students about the library cards is by presenting to teachers at the school training day. The teachers then inform their students.

What has been the biggest surprise and the biggest challenge regarding the Student Success Initiative?
Nine libraries (25%) answered that the biggest surprise was the enthusiasm of the school districts and willingness to work on with the library on the initiative. Seven libraries (19%) mentioned they were surprised to find out how little students and parents knew about the library. It has been a challenge to educate students and parents about resources. Six libraries (17%) mentioned that they were surprised by how much time was required to get the project off the ground, and one of the challenges was to keep the momentum going in the face of the lengthy process. Other challenges mentioned were staff changes, staff time, communication, library policies and working with the ILS.

Do you have advice for libraries considering a Student Success Initiative?
Most of the libraries mentioned not to give up on the Student Success program. They mentioned it can be difficult, but the goal of getting every student a library card is worth it. Many libraries encouraged building relationships with school administrators as soon as possible and to have patience with the length of the process.
**Student Success Initiative Case Study for Pilot Sites**

**Library Name:** Alameda Free Library

**Student Success Initiative Lead:** Hallie Fields, Senior Teen Services Librarian

**Type of library:** Multiple branch

**ILS vendor and product:** Polaris

**Type of school you are partnering with (choose as many as apply):** One school district

**Name of school or schools:** Alameda Unified School District

**Targeted student age (choose as many as apply):** Students 14-18 years old (9th-12th grade)

**Level of student success initiative card:** Internet only card, with the option to upgrade to a full service card

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** No, because we’re issuing virtual cards only. If students upgrade to a full service card they will follow the regular policies.

**What is your plan for identifying the student success library card in your ILS?** Student ID

**What is your estimated time frame for a roll out for this project?** Already started

**Please provide an overview of your Student Success Initiative, and where you are in the process:** The Connect Code project supplies digital library cards to high school students. The Connect Codes provide access to all digital resources from the Alameda Free Library. We issued around 500 digital codes to the 10th grade at Alameda High School during the Spring 2018 semester during the pilot portion of the project. We collected feedback from teachers and students and will continue with adding more students in the Fall 2018 semester.

**What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?** We have an MOU agreed upon by our city’s legal team and the AUSD legal team.

**How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?**
We are requesting the least amount of data from the schools about their students. We are asking for name, grade, and student ID number. We are also allowing students to opt out and keeping records confidential.

**Do you have a plan on how you will distribute the library cards to the students?**
During the pilot, we visited the schools and met with English classes to present the students with their Connect Codes.

**Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.**
“Connect Code” is the branded name of our project and how we present it in all marketing materials. So far, we have created bookmarks and teacher handouts.

**Do you have a plan for sustaining your Student Success Initiative?**
We will be working with the schools to make sure there is a steady stream of data when students enroll in the district. We have also identified key teachers and school personnel who are advocates for the program who can help our library resources become a key part of students’ doing research. Each Fall and Spring we will partner with the school librarian and English teachers to present to incoming students.

**Have you thought about ways to ensure that students know how to use their card and make the most out of it?**
We created a presentation about the Connect Code and how to use it. We partnered with teachers on how to make the most of the Connect Code project for their classes. We also created bookmarks and handouts that are available in the school library.

**What quantitative metrics have you established for measuring the success of your program?**
The quantitative metrics used for the Connect Code are the number of cards issued, number of logins to resources, and number of visits to the schools to present Connect Codes.

**Out of the milestones you selected at the beginning of the grant year, how many have you reached?**
We created a marketing strategy and identified key teachers for school visits. We are still working on a complete plan for distribution of the rest of the Connect Codes.

**Please provide us with the following data:**
- How many K-12 students are in your community/service area? 11,000
- How many active Juvenile cards does your library currently have? 18,614
- How many student cards have you distributed thus far (if applicable)? 452
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The biggest surprise is finding out how little some of the students and teachers in the area knew about the library. They were so pleased to hear about our free resources. The biggest challenge has been getting teen patrons to utilize the resources. We have been working hard to find a way to make the Connect Code enticing and sound like something the students want to use. We’ve discovered marketing resources Overdrive as something they can use for non-academic purposes is one great motivation for students to use the Connect Code.

Do you have advice for libraries considering a Student Success Initiative?
Partner with any school librarian or key teacher as soon as possible. They can help direct your initiative in a way that you may not have thought of before.
Student Success Initiative Case Study for Pilot Sites

Library Name: Altadena Library District

Student Success Initiative Lead: Christina McTighe, Children’s and Family Services Librarian

Type of library: Library system or district

ILS vendor and product: Koha by Bywater Solutions

Type of school you are partnering with: Multiple schools, multiple school districts

Name of school or schools:
There are so many! Altadena Elementary, Franklin Elementary, and Alma Fuerte Public Charter School are the schools with which we have active initiatives. Schools on the docket for future partnerships include Jackson Elementary, Oak Knoll Montessori, Odyssey Charter School, Aveson Global Leadership Academy, St Elizabeth’s Parish School, St Marks Academy, Pasadena Waldorf School, and many other small charters and private schools.

Targeted student age: Students 5-10 years old (K-5th grade)

Level of student success initiative card:
Limited access card: full internet/e-material access. Physical items are limited to five items but do include DVDs and Videogames. No age restrictions on items.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?
We went into the SSI having eliminated overdue fines.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? 9-12 months, 1-2 years

Please provide an overview of your Student Success Initiative, and where you are in the process: I will admit I went into this with a very misguided idea of how easy it would be. Everyone wants a library card! My initial plan was to target our local elementary schools, then charters and privates, while also trying to work from the top down with the large public school system (PUSD) that we share with two other library systems. I started by going public elementary school by school with paper applications, and received a return rate of about 3%. However, when a public charter school approached me (instead of the other way around), their application return rate was closer to 50%.
We are currently reassessing our tactics, and I am going to be working with our Teen Librarian and IT Director to develop an MOU to share with select charter schools in the fall, while the Teen Librarian and myself try to establish a partnership with the teen and children’s librarians from our other local library systems to try and get their administrations on board with a shared card between Altadena, Pasadena, Sierra Madre, and the PUSD school system.

So it almost feels like we are starting over again, from the beginning. But with some decent lessons learned along the way.

**What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?** Our IT Director is currently working on an MOU that we will present to our Board of Trustees and schools in the fall.

**How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?** We are still working on that. This year, dealing with paper applications, we were given information from parents or the students themselves.

**Do you have a plan on how you will distribute the library cards to the students?** This year, we dealt out cards in envelopes with welcome letters. Next year, we will work in conjunction with the school we choose to pilot our MOU-based/data file program to work out a solution that works for everyone.

**Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.** No, not yet.

**Do you have a plan for sustaining your Student Success Initiative?** The MOU that we are currently editing indicates that our partnership with the schools will continue on until such a time as either party doesn’t want to. It’s my hope that we make it beneficial and easy enough that no one would want to end the partnership.

**Have you thought about ways to ensure that students know how to use their card and make the most out of it?** Class visits, trips to the library, information for parents. Right now, we send a letter home with all of the stuff you can do with your library card and how to use it. But I think it’s best to actually bring people into the space and make them feel welcome and a part of things to encourage long-term and varied use.
What quantitative metrics have you established for measuring the success of your program?
At the moment, we are looking at the number of paper applications that the schools get back to us. Once we move to a MOU/automatic registration process, we will look at how many of those kids actually come in and use our materials or check out e-books.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? Not many at all! We’ve had some starts and stops, and only just now have additional staff had the time and work space to jump into the project. It’s my hope that next year will see a greater team effort, meaning more will be possible, all around. If we have to keep trying new things, we will—one day, something will stick.

Please provide us with the following data:
- How many K-12 students are in your community/service area?
- How many active Juvenile cards does your library currently have?
- How many student cards have you distributed thus far (if applicable)?

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? The biggest surprise and challenge have been our public schools’ relative indifference to the idea. There’s a lot of “sure, sure, yes” when you first take it to the principals, but then no one wants to invite you to a staff meeting or PTA meeting, there’s no follow through with the teachers. One school even asked if we could just make one card for the whole school (250 students) to use since that would just be easier. I don’t know if it’s a matter of us needing to sell it harder or if we are misreading the needs of the community. But that’s been frustrating and a shock.

Do you have advice for libraries considering a Student Success Initiative? If you think that everyone will love you and be on board from the get go, take a minute and rethink that. Especially if your relationship with your schools isn’t the strongest. I’ve been here for a year and a half, and when I started, one of the local principals told me that she’d never met anyone from our library before, so we were really starting from scratch. The local schools got used to doing without us, and so when we came in to convince them of our relevancy they didn’t see the point. It’s been an uphill battle, and it remains one. But it will be worth it. Making library access easily and available for young people is such a worthwhile—and attainable—goal that we should put in the work to make it happen.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Arcadia Public Library

**Student Success Initiative Lead:** Petra Morris, Children’s Services Supervisor

**Type of library:** Library system

**ILS vendor and product:** Bywater, Koha

**Type of school you are partnering with:** Multiple schools, One school District

**Name of schools:** Dana Middle School, First Avenue Middle School, Foothills Middle School

**Targeted student age:** Students 11-13 years old (6th-8th grade)

**Level of student success initiative card:**
Limited access card (explain restrictions): Limited to 2 item check out with full access to all electronic resources and the Library's public workstations.

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?**
Standard fines and fees still apply to the student card. As we, however, grow the program from middle school, to include high school, we plan to offer a “fresh start” program as students transition from one academic level to the next. Upon entering high school, we hope to waive accrued fines, but fees for lost books will remain.

**What is your plan for identifying the student success library card in your ILS?**
We haven’t figured this out yet – either Student ID or Patron Type

**What is your estimated time frame for a roll out for this project?** 9-12 months

**Please provide an overview of your Student Success Initiative, and where you are in the process:**
Library staff met on a few occasions to discuss the Library’s existing student card service, plans for an improved service that would target sixth grade students from the local middle schools, and strategies for how we would go about accomplishing this.

The challenge has been in resolving what and how we offer the service – do we use student identification cards or library cards; do we limit checkout to two items or allow students to check out a greater number of materials; do we waive fines accrued on student cards or let them stand.
Library staff has worked through some of those issues and concurrently reached out to the Arcadia Unified School District Librarian. We met with the Librarian and shared concerns relating to the service as well as sought her help in working with the District to implement the project.

The School Librarian has been working with various District staff to determine the best way to proceed. Public Library staff has worked to develop a formal proposal to present to the District.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? Upon working with the District to establish and finalize a plan for the project, adopt a formal Memorandum of Understanding between the Library and School District.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? At this stage in working with the District, compliance with the Family Educational Rights and Privacy Act has not been raised.

Do you have a plan on how you will distribute the library cards to the students? We plan to use student identification cards instead of distributing a separate Library Card to each student.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Our focus has been to establish a proposal and working plan of action for the project at this time.

Do you have a plan for sustaining your Student Success Initiative? Upon fully establishing and carrying out the Student Success Initiative for middle school students, we plan to grow the program to the high school level and then elementary school level. Our goal is to improve upon past mistakes and maintain best practices as we progress.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Library staff plans to set up a small middle school focus and inquire with students as to the best ways to share about the new service.

What quantitative metrics have you established for measuring the success of your program?

- Circulation statistics
- Electronic resource usage
- Active use of cards
Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have reached one milestone – “The library has held one or more meetings, and has communicated the goals of this project.”

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Thus far, the biggest challenge has been for Library staff to work through project details and address concerns that impact not just one section of the Library but several – from Administration to Account Services to Children’s Services to Technical Services.

Do you have advice for libraries considering a Student Success Initiative? Working with the District Librarian has been extremely helpful. She has been very supportive of the project which has made the endeavor seem more of an equal partnership than a one-sided push to implement a new service to an outside group.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Beaumont Library District

**Student Success Initiative Lead:** Luren Dickinson, Library Director

**Type of library:** Single branch and bookmobile

**ILS vendor and product:** TLC Library Solution

**Type of school you are partnering with:** The local school district, Charter Schools and Home Schoolers

**Name of school or schools:**
Beaumont Unified School District (Anna Hause Elementary, Brookside Elementary, Palm Elementary, Sundance Elementary, Starlight Elementary, Three Rings Ranch Elementary, Tournament Hills Elementary.); Charter Schools in Beaumont/Cherry Valley (Discovery of Learning, Highland Academy)

**Targeted student age:** First Grade

**Level of student success initiative card:** Limited access card: Students will be able to check out 3 books from the children’s collection, in addition to internet access.

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** No fines or fees are planned for this card.

**What is your plan for identifying the student success library card in your ILS?** We will be using a separate patron type and a unique barcode prefix to identify these accounts.

**What is your estimated time frame for a roll out for this project?** 3 to 6 months.

**Please provide an overview of your Student Success Initiative, and where you are in the process:**
We are in the process of seeking policy and funding approval from the Board of Trustees with some of the funding to be solicited from the Friends of the Library.
Plan of Action: Have all first grade students attend a fall field trip to the Library where they will be given an educational tour and be read a story. Later, students will receive their own inactive “1-2-3 Grow with Me” library cards.

How “1-2-3” Card Works: With the card, students will be able to check out only children’s books and no more than three at a time. There will be no fine or fee for books that are not returned, but one less checkout will be allowed for each book not returned.

Students will be able to activate their “1-2-3” cards at the Library (with or without their parents/guardians). Parents/guardians will, however, have final say if they want to deny card use or to sign students up for a regular children’s card in lieu of the “1-2-3” card.

The activated cards will expire in three years—at which time the students, with permission of a parents/guardians, can sign-up for a "regular" library card that would include computer and movie privileges.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? The cards will be opt-in—not requiring a formal agreement or MOU. The school district is on board and providing the funding for field trips for first grade classrooms not within walking distance (5 of 7 elementary schools) for the Fall of 2018.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? N/A

Do you have a plan on how you will distribute the library cards to the students? Yes, each teacher will receive a tote bag containing the unactivated cards and distribute them to the students in their classroom following their field trip to the library.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We are using the name “1-2-3, Grow with Me!” for this new card as a way to brand not only the way it can be used (no more than three items at a time) and how long it can be used (three years), but also as a tie-in to our Library’s tagline (. . .Growing with You), which shows that the Library is growing with the Community.

Do you have a plan for sustaining your Student Success Initiative? We are in the process of seeking approval for a 3-year roll out of the program from the Board of Trustees, after which it will be evaluated for continuation in the long term.
Have you thought about ways to ensure that students know how to use their card and make the most out of it? Not yet.

What quantitative metrics have you established for measuring the success of your program? Based on conversations with other libraries at the workshop, we have decided on the following metrics for success:
- A 20% activation rate of all cards disbursed
- Participation from every school
  The student’s school will be included in their identifying information in our ILS. We are considering implementing a contest between the schools to drive participation.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
We just named milestones we had met at the beginning of the year, so we are doing fine!

Please provide us with the following data:
- How many K-12 students are in your community/service area? Approx. 1000 (first grade students only)
- How many active Juvenile cards does your library currently have? We currently have 5337 juvenile cards, though 4169 of those are expired (1168 active)
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
Lack of funding from the State for this initiative has been both surprising and challenging. We appreciate the guidance received (both online and via workshop), but some level of funding would have been welcome! It has been a lot of work/time to put together proposals, meet, etc. for funding to/with various (potential) stakeholders: Board of Trustees, Friends of the Library, Beaumont Unified School District.

Do you have advice for libraries considering a Student Success Initiative?
Be aware that you will have to come up with the funding!
Student Success Initiative Case Study for Pilot Sites

Library Name: Benicia Public Library

Student Success Initiative Lead: Brandi Bette Smead, Teen Services Librarian (II)

Type of library: Single outlet as a department of the City of Benicia

ILS vendor and product: CARL.X

Type of school you are partnering with (choose as many as apply): One school district

Name of school or schools:
Benicia Unified School District
- Benicia High School
- Liberty High School
- Benicia Middle School
- Robert Semple Elementary
- Mary Farmar Elementary
- Joe Henderson Elementary
- Matthew Turner Elementary

Targeted student age: Students 11-13 years old (6th-8th grade), Students 14-18 years old (9th-12th grade). We will start with the middle and high schools but we will eventually integrate the elementary schools as well.

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? We are in the process of creating a policy which would allow us to waive all fines of students going into middle school and then again when they graduate high school. We will waive fines, not lost or damaged items.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? 3-6 months: We are hoping to have the first set completely ready for use by the time school starts in the fall of 2018.

Please provide an overview of your Student Success Initiative, and where you are in the process: A colleague and I started talking about doing something like this in January of 2017. Our local teens were always forgetting their library cards but they always had their school
IDs on them! We thought about how great it would be if the students’ library cards were somehow attached to their school ID. That was about 6 months before I even heard of the Student Success Initiative. I got permission in May 2017 to reach out to the local school district to ask them about partnering on this project. They agreed right away and the Benicia Public Library began making plans and trying to figure out the logistics of the project. The school district is completely on board with this. We are just waiting on Carl.X to figure out how we can work it out in reality.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? There is no formal agreement.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? All student data will remain private.

Do you have a plan on how you will distribute the library cards to the students? The Library cards will be their student IDs.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We have not gotten this far.

Do you have a plan for sustaining your Student Success Initiative? Yes, we will get a list of all incoming students each year and add them to our database.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? I will most likely be doing some outreach to the schools to share information about the cards.

What quantitative metrics have you established for measuring the success of your program? We are still trying to figure out how to gather the online data associated with the use of databases. I am not sure this part will be measurable. We will, however, be able to see how many items are checked out by these cards.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? All of them

Please provide us with the following data:
- How many K-12 students are in your community/service area? ~5000
- How many active Juvenile cards does your library currently have? 3627
- How many student cards have you distributed thus far (if applicable)? 0
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?

The biggest surprise is the fact that we were ready to move forward with this but we had to wait for months on the rest of Solano Public Library since they are the driving force behind our consortium.

Do you have advice for libraries considering a Student Success Initiative?

Foster a relationship with as many officials in the school district as possible.
Student Success Initiative Case Study for Pilot Sites

Library Name: City of Calabasas

Student Success Initiative Lead: Anita Torres, Library Circulation Supervisor

Type of library: Single branch

ILS vendor and product: Innovative (III) formerly Polaris

Type of school you are partnering with: One school district

Name of school or schools (school district): Las Virgenes Unified School District

Targeted student age (choose as many as apply): K-12

Level of student success initiative card: Limited access card (online/digital materials such as e-books, downloadable audio books, databases)

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? This is an online/digital access only card, so fines are N/A

What is your plan for identifying the student success library card in your ILS? Student ID, Patron type

What is your estimated time frame for a roll out for this project? 3-6 months (2018/2019 school year beginning in August)

Please provide an overview of your Student Success Initiative, and where you are in the process: Our library has held several telephone and in person meetings with the school district liaison and also with the city and school district I.T. departments. We have a rollout plan in place and it will begin with registration for the 2018/2019 school year.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We have an existing MOU between our city library and the local school district. It was decided that adding the Student Success Initiative as a line item was sufficient, rather than creating an additional MOU.
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? At this time we are issuing digital use only cards, so there is minimal student data required for processing the account. As an additional precaution, there will be an opt-out included in the school registration packet for any parents/guardians who do not want their student to participate.

Do you have a plan on how you will distribute the library cards to the students? All students will have an account, with no physical card required. Login information will be included in the school registration packet.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We would eventually like to incorporate a logo, but at this time are focusing on roll out and the flyers will be infographic in nature, using the designs and colors of our existing juvenile library card.

Do you have a plan for sustaining your Student Success Initiative? Importing data annually for new student registration. Ongoing cooperation with the schools.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Infographic flyer included with school registration packet, instructions link on our website, strong collaboration with school liaison who will train faculty to assist students. We will also have the flyers at the library, and they will hopefully look familiar to students from what they have seen at school. These will serve as a reminder and a tie-in.

What quantitative metrics have you established for measuring the success of your program? The Student Success accounts have a different card # format and “patron type” field than our physical cards, so we will be able to isolate those records when we run usage statistics.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? Nearly all!

Please provide us with the following data:
- How many K-12 students are in your community/service area? 11,300
- How many active Juvenile cards does your library currently have? 6,400
- How many student cards have you distributed thus far (if applicable)? None yet

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? The biggest surprise so far was finding that the MOU and the confidentiality of
student data did not pose as much of an issue as we had expected. The biggest challenge so far has been the “tech” aspect of things.

**Do you have advice for libraries considering a Student Success Initiative?**

If possible, create a team that consists of an organized person, a creative person, a data person and a networker. Or on a small staff, maybe one or two people who have all of those skills? 

haha That combination of strengths will make it easier to accomplish the different components of the process, and then bring everything together successfully. Decide early on what your goal is, and then use the benchmarks and milestones to celebrate accomplishments along the way. Reach out to mentors and other participants for ideas, advice and also just to vent! Be open to adjusting your goal along the way, as you realize what is working and what is not working. Once the new goal has been established, focus back on the benchmarks and milestones. Cooperate, cooperate, cooperate – with the schools, with your co-workers, with the IT department, with everyone who will help you get to where you ultimately need to be. Remind everyone that you are all working toward a shared goal, even if the reasons for wanting the goal are different, you all need each other in order for the project to be successful.
Student Success Initiative Case Study for Pilot Sites

Library Name: Camarena Memorial Library, Calexico

Name of Student Success Initiative Lead: Sandra Tauler, Community Services Director

Type of library: Single branch

ILS vendor and product: Innovative Interfaces, Millenium

Type of school you are partnering with: One school district

Name of school or schools: Calexico High School

Targeted student age: Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Limited access card: Check out up to 5 books, access to all online resources, no Internet access at the library

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? We have eliminated fines for all Student Success card holders. This year we are doing grades 9-12. From now on, we will issuing cards to Kindergarten and 9th grade, until we have included K-12th grades.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process: The partnership with Calexico Unified School District was solidified for this program a couple of months ago. We share an ILS system, so we already had the student info. Library cards have been created for every student in 9-12th grade. Distribution started on May 21st! Unfortunately, we had trouble ordering our cards, so the school year vanished on us. Nonetheless, we forged on and started anyway!!! We handed out 1,500 library cards to 9th – 11th graders. Library staff was stationed in the school library and the English classes took turns coming by to pick up the library cards. We issued an “active card” to each student, so they can begin using them the minute they have it in their hand. We also shared a power point presentation with the classes that came by to pick up their cards, with information about the resources they now have access to with their card.

IT WAS A VERY SUCCESSFUL START to our distribution plan!!!!

We were able to reach about half of the 9-11th graders. At the last minute, it was decided to skip 12th grade this year. Since we started so late, we would not have time to hand the cards
out. We considered that the best option was to save those library cards for the 9th graders in the Fall. We are already making arrangements for the distribution of cards to the 9th graders in early October.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We have an informal agreement – not in writing, but very solid since we have been partnering for the last 20 years on various projects. We have been sharing an ILS system since 2000. The high school teachers are very excited to have such a wonderful resource delivered to every student! They are asking when we will do the lower grades!

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We are not doing anything different than we have been doing since 2000. We treat student data confidentially, just as we do the library patron data. Not sure what FERPA requires.

Do you have a plan on how you will distribute the library cards to the students? Yes, we took the cards to the students. Each English class will visit the school library, where public library staff will have the cards ready – in alphabetical order by grade. We were able to hand out 62% of the cards before the end of the school year. During this summer, library staff will be calling all the students that we did not reach at the school site, to invite them to pick up their card. It is not the best situation, but was a gamble we took when starting so late. We did not want to wait another school year to get started. We are now going to do our best to reach all 9-12 graders in the fall, to fully implement our program and continue each year with the new 9th graders.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We created new library cards for the SSI. It is garnets with a gold star on it! A copy is attached. (see Appendix) We decided on these colors since they are the school colors and we thought the students would be more accepting of it, as a “school supply.”

Do you have a plan for sustaining your Student Success Initiative? No solid plan to support it financially yet. However, library staff is very committed—so we will make it work! We will ask our Friends of the library for support to continue purchasing the special cards.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We started out with a power point presentation to each class as they visited the school library to pick up their cards. In the Fall, we will follow up with class visits and notices in the daily bulletin to remind students to use their card.
What quantitative metrics have you established for measuring the success of your program? We will be able to check circulation by the patron type in our LIS. However, we have not set any other metrics for the use of online databases. Will have to figure out how to do that in the coming months.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We only had two milestones on our list: to implement the program and to educate the students and teachers about the resources that come with the Student Success card. We met the milestones—somewhat.

The program was implemented! However, since it was so late in the school year, we were only able to reach about 62% of the students. It is our plan to reach the remaining students early in the Fall, along with the new 9th graders.

The second milestones was to educate the students about what they have access to with their card. The same situations happened—we did not reach all of them. It is our plan to do a promotional campaign in the Fall, to remind students to use their card and to reach the students we did not get to at the end of the school year.

So I guess we can say that we reached our goal at 62% BUT, our main goal was to get the program started!!!! AND WE FEEL VERY PROUD THAT WE DID DO THAT!!!!

Please provide us with the following data:

- How many K-12 students are in your community/service area? N/A
- How many active Juvenile cards does your library currently have? 5,057
- How many student cards have you distributed thus far (if applicable)? 1,500

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Our biggest challenge was actually our city’s ordering process. It took us over two months to get the authorization to order the cards. This put us in a time crunch to be able to implement the program as we had planned to do during the 2017-18 school cycle. The details of the delay are irrelevant here, but the message is that sometimes the most difficult kink is something you did not even consider. Once we were able to order the cards, we knew that we would only have about 3 weeks to do the implementation. This is when we decided to focus on 9-11 for this school year. The Seniors would be too busy to catch during this time. We worked closely with the school library coordinator to schedule our visits. 9th grade has a separate campus. We were able to hand out 99% of the cards at the site. 10th – 12th grade were a bigger challenge, mostly because we were trying to get their time and attention during the last 2 weeks of school. We were able to reach about half of the 10th and 11th graders. Even
though it was challenging, I think we did extremely well for having started the distribution at the end of May!

**Do you have advice for libraries considering a Student Success Initiative?**

The biggest bit of advice is not to start so late in the school year! It makes it very hard to get the attention of the teachers and the students, who are focused on the end of the school year.

My second piece of advice, which maybe should be my first, is to not let anything stop you! We started late! We knew that the possibility of not reaching all the students was very high, but we were more focused on starting, than finishing!!! Now that we have started, we are eager for the school year to begin, so that we can fully implement all 4 grades—9-12.

We particularly liked our idea of using the school colors on the new SS cards! We thought that it would help the students treat it more like a “school supply.” We may not be able to prove it, but we think it helps with the acceptance level by the students.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Contra Costa County Library

**Student Success Initiative Lead:** Amy Mockoski, Librarian Specialist- Youth Services

**Type of library:** Library system or district  
**ILS vendor and product:** TLC/CARL

**Type of school you are partnering with (choose as many as apply):** One school

**Name of school or schools:** Antioch Middle School

**Targeted student age:** Students 11-13 years old (6th-8th grade)

**Level of student success initiative card:** Full access card (except for LINK+)

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** The library is looking at revising our fine policies in order to improve access for children and teens.

**What is your plan for identifying the student success library card in your ILS?** Student ID Patron type

**What is your estimated time frame for a roll out for this project?** 3-6 months

**Please provide an overview of your Student Success Initiative, and where you are in the process:** Originally the target for the pilot was two schools in neighboring cities. The first was Pittsburg High School in Pittsburg. The second school was Riverview Middle School in Bay Point. Pittsburg High School decided they did not want to provide data to the library. The library and Riverview Middle School needed to prioritize other joint projects this year, so no progress was made in terms of the student success initiative pilot. Due to extreme interest on the part of the principal in getting library cards for all enrolled students the project was shifted to Antioch Middle School. The school provided the necessary data for all their students. The Circulation Manager has created a new student patron type in the ILS and added new user defined fields in order to capture the school and school district in each account. New patron accounts have been created manually to test the new patron type and CARL and the Automation Manager are configuring the automated loader. Very soon the loader will be ready to test with the supplied data. This school year is quickly coming to an end so accounts aren’t likely to be created during the 2017/18 school year, but testing will continue over the summer in preparation for next school year. The plan is to create library accounts with full access...
(LINK+ excepted) and to use the barcode and student ID numbers issued by the school as the student’s library card and account number. The library will change to using the shortened form of our local library card number to one that includes a prefix in order to prevent duplicate library card account numbers.

**What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?**

There is an informal agreement with the school principal and the school district superintendent signed a support letter for the ConnectED project.

**How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?** The school is providing data allowed under FERPA and the student’s privacy will be protected using the strict privacy standards applied to all patron data as mandated by the State of California.

**Do you have a plan on how you will distribute the library cards to the students?**

Ideally the student ID and barcode will be used as their library card so distribution won’t be necessary.

**Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.** No marketing or branding has been created yet because the Automation Manager is testing the process in CARL. Since the project is with one school the focus will be on marketing on promoting our services to parents so that the accounts are used by the students and their families.

**Do you have a plan for sustaining your Student Success Initiative?** The library isn’t yet at the stage in the project for planning sustainability, but there have been discussions on handling new data at the beginning of each school year. Once the library has had an opportunity to test out the roll over in to a new year we could look at reaching out to additional schools or districts for participation.

**Have you thought about ways to ensure that students know how to use their card and make the most out of it?** Library staff conducting school visits with students and parents will be the best way to communicate the library’s services. The school has an established relationship with its closest library branch, but having enough staffing available to conduct on-going visits to the school is going to be a challenge.

**What quantitative metrics have you established for measuring the success of your program?**

- No. of library accounts created.
- Having a card type for students allows tracking of library account usage.
Out of the milestones you selected at the beginning of the grant year, how many have you reached?
The library selected the following benchmarks:
1. The library staff is aware of this project and we have formed a team to work on this project.
2. We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc.
3. The library is creating a timeline for this project, and is flexible, knowing that dates might shift.

A team has been formed and they are currently actively working on the project. The team consists of Librarian Specialist for Youth Services, Automation Manager, Deputy County Librarian, Circulation Manager and library staff at the library closest to the targeted schools. At the beginning of this pilot year we had clear targets for our initiative, but the shift from the two original schools to one new school changed the targets greatly. The library had to remain flexible and make quick changes, but new targets have been established for working with Antioch Middle School. The timeline has had to be incredibly flexible due to the challenges and delays encountered during the pilot.

Please provide us with the following data:
- How many K-12 students are in your community/service area? 176,413
- How many active Juvenile cards does your library currently have? In the last year 29,498 young people ages 0-17 used their library cards. We don’t have a separate card type for juveniles.
- How many student cards have you distributed thus far (if applicable)? 0

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? The biggest surprise was the reluctance of the original school to provide the data after initially being very excited about partnering with the library and not reluctant about data sharing. It appears that as the project went up the chain of command the enthusiasm dwindled and the nervousness about student data increased. Also the assistance required from our ILS vendor took more time than anticipated because only a few projects can be submitted to them at once. This project was bumped down in the list of priorities due to another more time sensitive project. Beyond that staffing time to devote to the project was, and will continue to be a challenge, but that was not a surprise.

Do you have advice for libraries considering a Student Success Initiative? The Student Success Initiative is a very slow process and it’s important to focus on the small successes along the way. The Contra Costa County Library serves 19 different school districts so the Student Library Card Initiative is very daunting, but it’s important to not get distracted by the huge number of students, but to instead focus on the real goal of increasing library card usage in order to positively affect student success, even if that happens a little bit at a time.
Student Success Initiative Case Study for Pilot Sites

Library Name: Dixon Public Library

Student Success Initiative Lead: Jim Tinder, Youth Services Librarian

Type of library: Library system or district

ILS vendor and product: CARLX

Type of school you are partnering with: One school district
Name of school or schools:
Anderson Elementary
Tremont Elementary
Gretchen Higgins Elementary
Jacobs Middle School
Dixon High School

Targeted student age:
Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)
Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Have not decided yet; We are following the lead of Solano County Public Library

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? No

What is your plan for identifying the student success library card in your ILS?
We are following the lead of Solano County Public Library.

What is your estimated time frame for a roll out for this project? 1-2 years

Please provide an overview of your Student Success Initiative, and where you are in the process:
We are in the beginning stages. Solano County Public Library will be doing testing in CARL in the coming months. We are following up with SCPL regularly to check their progress. Since Dixon and Solano each use CARL, we are following their lead in how to best apply SSI into CARL.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
The Dixon School Board also serves as the Dixon Public Library Board. We have an informal agreement on rolling out SSI. The Board is fully supportive of this effort. They are aware that DPL is monitoring SCPL’s endeavors and results.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We haven’t as yet.

Do you have a plan on how you will distribute the library cards to the students?
We are looking at making cards available to the teachers at the beginning of a school year for distribution to students, along with an opt-out form for parents.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We haven’t as yet.

Do you have a plan for sustaining your Student Success Initiative? Not yet.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Not yet.

What quantitative metrics have you established for measuring the success of your program?
- The Library staff are aware of this project and I have formed a team to work on this project.
- We have established clear targets for our initiative, such as the school district, private schools, etc.
- The Library has identified one or more key persons with the school or school district (in our case, the Library Board is also the School Board).
- The Library has a clear plan for implementation and distribution of student success library cards.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? All of the following:
- The Library currently partners with five schools (three public, two private) in the service area.
- Library staff currently have relationships with ~20 teachers and other key personnel within the service area.
- Library staff conduct ~10-12 visits and presentations to schools annually.
- Schools currently plan ~20 student/teacher field trips to the Library each year.
- ~650 children currently participate in the Library’s summer reading program annually.
Please provide us with the following data:

- How many K-12 students are in your community/service area? 2016-17 enrollment: 3,663
- How many active Juvenile cards does your library currently have? n/a
- How many student cards have you distributed thus far (if applicable)? 0

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Trying to get to and beyond the ILS stage.

Do you have advice for libraries considering a Student Success Initiative? No
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Folsom Public Library

**Student Success Initiative Lead:** Debbie Centi, Youth Services Librarian

**Type of library:** Single branch

**ILS vendor and product:** Sierra

**Type of school you are partnering with:** Multiple schools, One school district

**Name of school or schools:** Folsom Cordova Unified School District

**Targeted student age:** 5-10 years old (K-5th grade)

**Level of student success initiative card:** Full access card

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** Yes.

**What is your plan for identifying the student success library card in your ILS?** We are not going to differentiate.

**What is your estimated time frame for a roll out for this project?** Already started

**Please provide an overview of your Student Success Initiative, and where you are in the process:**
We provided return to activate library cards to all kindergarten students within the city of Folsom (10 elementary schools, 32 classes, 700 students) during the 2017-18 school year. Bestselling Author and Illustrator David A. Carter, known for his popup books for children and adults, donated his time and talent to create the new library cards for our Student Success Initiative. Over the course of a few weeks, librarians visited kindergarten classes to deliver the specially designed library cards, shared stories and talked about the library and its programs. To date, over 200 cards have been activated, with a return percentage over 30%.

**What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?**
Our partnership with the school district administration includes a plan for yearly distribution of the full access My First Library Card to all kindergarten students.
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? Our project doesn’t require securing student data from the school district.

Do you have a plan on how you will distribute the library cards to the students? Yes. We’ll return each year to individually visit with kindergarten classes.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We marketed the project as a *My First Library Card* and used the artwork created for the specially designed card in all our marketing and promotion efforts.

Do you have a plan for sustaining your Student Success Initiative? Yes. We have secured continued funding for the project through our friends of the library organization.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Information is shared with students and parents about library card privileges and benefits at the time of distribution and again at activation.

What quantitative metrics have you established for measuring the success of your program? We tracked and recorded:

1. The number of cards delivered to each school.
2. The number of students returning to the library to activate cards by school.
3. The overall return to activate percentage.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? Our milestones were reached.

Please provide us with the following data:

- How many K-12 students are in your community/service area? 14,725
- How many active Juvenile cards does your library currently have? 7,150
- How many student cards have you distributed thus far (if applicable)? 700

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? The initiative created much goodwill and support for the library among our area schools. Our biggest surprise has been the number of additional outreach requests we’ve received from the school district at all grade levels. Challenges were minimized by the presentation of a project that didn’t require an exchange of student data. The success of this
project allows for a continuing dialogue regarding future collaborations that would utilize student data to provide cards for all students.

**Do you have advice for libraries considering a Student Success Initiative?**
Consider all possibilities for collaboration. Expect possible resistance – but persevere-the rewards are many for your library and your communities.
Student Success Initiative Case Study for Pilot Sites

Library Name: Huntington Beach Public Library

Name of Student Success Initiative Lead: Melissa Ronning, Children’s Librarian

Type of library: Multiple branch

ILS vendor and product: SirsiDynix Horizon 7.5.3

Type of school you are partnering with: One school district - Huntington Beach Unified High School District

Name of school or schools: Huntington Beach High School, Edison High School, Marina High School, Ocean View High School, Fountain Valley High School, Westminster High School.

Targeted student age: Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Limited access card - Limited to 5 book items and no media for check out. Full e-content.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? There will be no fines or fees associated with this card.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process: Our cards are actually due this week. We are doing a soft roll out with one of the high schools in our high school district. We will do a full roll out in late August – through October to reach the students at the remaining high schools.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We will not be creating a MOU. Our partnership is with the HBUHSD, and we will initiate our program through the schools, and then do a follow – up each fall with the Freshman Class. This is an informal agreement.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We do not share account information with anybody. We will not be asking for any student data from the schools. We will not be using student ID numbers as library card account numbers. Student cards will be using the library’s
existing card format. A student may use their Student ID as proof of residency, but this information will not be attached to their library account.

**Do you have a plan on how you will distribute the library cards to the students?** Our plan is to take mobile devices to the schools and create cards during the student registration in the fall. We anticipate that this will take several weeks to accomplish at all the schools. After the initial distribution, any student can get a card at any of our branches using either their student ID, or CA ID as proof of residency. Each fall we will return to the schools and meet with the Freshman classes to create accounts for interested students.

**Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.** (See Appendix for documents) [http://4la.co/1J5GST](http://4la.co/1J5GST)  [http://4la.co/1K35A1](http://4la.co/1K35A1)

**Do you have a plan for sustaining your Student Success Initiative?** As explained above, our plan is to visit the campuses in the HBUHSD each fall to make the cards available to the incoming Freshman classes. They will also be available to any student who wishes to get a card at each library branch.

**Have you thought about ways to ensure that students know how to use their card and make the most out of it?** We will create a flyer/pamphlet to be distributed with the cards, and also do school visits each fall to explain the benefits and differences between a teen card and a regular card.

**What quantitative metrics have you established for measuring the success of your program?** We will be keeping track of the number of cards issued annually.

**Out of the milestones you selected at the beginning of the grant year, how many have you reached?**

- We have established clear targets for our initiative.
- We have identified one or more key persons with the school district to coordinate with.
- We have a library team working on this project.

Please provide us with the following data:

- **How many K-12 students are in your community/service area?** 31,000
- **How many active Juvenile cards does your library currently have?** 26,000
- **How many student cards have you distributed thus far (if applicable)?** 0

**What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?** It has taken much longer to create the cards than we anticipated. We also lost our initial contact person with the school district when she left her position. We re-established a
relationship with her replacement, who then went on maternity leave before we could distribute cards. We are probably 3 months behind our initial time line.

**Do you have advice for libraries considering a Student Success Initiative?** We believe that this is a worthwhile project despite delays. It may take longer to initiate than you had planned, but keep working towards the end goal – getting students access to the services that your library can provide to them.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Livermore Public Library

**Student Success Initiative Lead:** Nathan Brumley, Supervising Librarian, Youth Services

**Type of library:** Library system

**ILS vendor and product:** Innovative Interfaces - Sierra

**Type of school you are partnering with:** One school district

**Name of school:** Livermore Valley Joint Unified School District – Livermore and Granada High School.

**Targeted student age (choose as many as apply):**
Students 14-18 years old (9th-12th grade) (for now – others to come in future years)

**Level of student success initiative card:** Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? Not at this time.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 3-6 months

Please provide an overview of your Student Success Initiative, and where you are in the process: We have set regular meetings with LVJUSD administrators, who have agreed to do this program, and the district and library are working on putting together an MOU. Once this MOU is complete, we will work toward making rollout happen for at least all freshmen at the start of the 2018/2019 school year, and possibly the entire two high schools. The Library’s Technical Services staff and the School District’s IT staff have met and talked through what the process would be for exchanging data when it is approved. After these pieces are in place, the library will develop a marketing plan, work with the school district to have all 9th graders visit the library at the beginning of the year, and then work to expand library cards to the remaining students in the school district over the next few of years.

Our goal is to use the students’ ID as their library card, using the barcode on their ID to checkout materials. It will be an all access card governed by the same rules as our regular cards. The data entry from the school district will be automated.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
At this point the agreement is informal with several high level administrators, including the superintendent. An MOU is being written for the first two years of this pilot program, which will be extended provided the program is considered successful.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
During registration, parents will have the opportunity to opt-out of this service.

Do you have a plan on how you will distribute the library cards to the students?
Library cards will be their Student ID. Students will be receiving these from the school district. It is our hope that the library’s logo will be printed on the student’s Student ID.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Not at this time.

Do you have a plan for sustaining your Student Success Initiative? Continue good relations with the school district by continuing partnerships wherever we can. Previously built good relationships are the reason we’re able to do this in the first place.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We plan on making more classroom visits throughout the year and even having all high school freshmen visit the library at the start of each year during their high school orientation weeks.

What quantitative metrics have you established for measuring the success of your program?
1. Library staff conduct X number of visits and presentations to schools annually.
2. X number of uses of homework help databases.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
1. The library staff are aware of this project and I have formed a team to work on this project.
2. The library has identified what level of collaboration we will be able to do with the schools regarding issuing and sharing data (such as using the student ID numbers, how to use the cards, etc.)
3. Work with school district to determine whether an MOU is needed; if so, create MOU.
4. The library has identified one or more key persons with the school or school district.
5. The library has held one or more meetings, and has communicated the goals of this project.
Please provide us with the following data:
- How many K-12 students are in your community/service area? 14,000
- How many active Juvenile cards does your library currently have? 8,128
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The amount of time it can take for an answer or next step to come through.

Do you have advice for libraries considering a Student Success Initiative?
Don’t be surprised if it takes you much longer to get things in place than you thought it would.
**Student Success Initiative Case Study for Pilot Sites**

**Library Name:** Los Gatos Library

**Student Success Initiative Lead:** Jennifer Laredo, Division Manager

**Type of library:** Single branch

**ILS vendor and product:** Koha

**Type of school you are partnering with:**
- Multiple schools (2 public currently)
- One school district
- Other: (1 private school)

**Name of school or schools:**
- Los Gatos High
- Fisher Middle School
- Fusion Academy

**Targeted student age:**
- Students 11-13 years old (6th-8th grade)
- Students 14-18 years old (9th-12th grade)

**Level of student success initiative card:** Full access card

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?**

We have implemented a “YOUTH” status, applying that to SSI cards and all other youth patron cards. The Youth status gives our young patrons a fine-free library experience.

**What is your plan for identifying the student success library card in your ILS?**

- Student ID (LGHS and Fisher)
- We are not going to differentiate (Fusion Academy, they don’t have Student ID cards)
- Other – we are working on a way to identify these cards in our system, to help us get better data...

**What is your estimated time frame for a roll out for this project?** Already started

**Please provide an overview of your Student Success Initiative, and where you are in the process:**
• Our LGHS students, about 1800 of them, are already using their student ID cards as library cards.
• Our Fisher students are getting approval for cards as they register this year, which will lead to another 1500 cards.
• Our Fusion students are getting cards one by one, via paper applications, after targeted visits from Library staff. We hope to get all 70 students cards.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
Our agreements are all informal. We have talked with staff at the schools, and come up with a plan verbally.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
We are following our regular library policies, not adding any extra security for these accounts.

Do you have a plan on how you will distribute the library cards to the students? "
The bulk of the cards are just Student IDs and are distributed by the schools. The physical cards have been hand delivered.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
We have created signs, letting students know their ID cards work as library cards.

Do you have a plan for sustaining your Student Success Initiative?
We plan to continue partnering with schools, to get new student data on a yearly basis. We hope to expand to other schools, until we have issued library cards to every student in Los Gatos

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
We are mostly doing word of mouth advertising, talking to students when they come in. We sent a flyer home at the start of the school year, with each LGHS student. Also, the teachers help us spread the word.

What quantitative metrics have you established for measuring the success of your program?
• Library currently partners with X number of schools in service area (currently 3)
• The schools currently share X type of data with my library (student name, address, email, phone, student ID number for public schools)
• X number of children ages 0-18 currently have library card (we have a "YOUTH" status, which will group everyone 0-18)

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
• Library staff are aware of the project and I have formed a team to work on the project (Yes, and team is Jenn, Carol, and Ryan)
• We have established clear targets for our initiative (currently, get LGHS data in (done!) and then begin work with Fusion and Fisher Middle School. Solidify which aspects of the data sharing are the same between these schools, and what needs to be adjusted on a school by school basis. Then, extrapolate these lessons as we look to the other middle school, other private schools, and then ultimately, the elementary schools)
• Library has a clear plan for implementation and distribution of student success library cards (We currently have two plans, one for public schools with ID cards, and one for smaller, private schools that do not have their own Student ID)

Please provide us with the following data:
• How many K-12 students are in your community/service area? ~ 9000
• How many active Juvenile cards does your library currently have? 6586, though this includes cards for preschool kids. Can’t sort out which are the K-12 age only.
• How many student cards have you distributed thus far (if applicable)? Almost 1900, with 1500 more coming this Fall.

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
Surprise, just how excited everyone has been to get on board, so far. The biggest challenge will be getting the kids to use the cards once they have them.

Do you have advice for libraries considering a Student Success Initiative?
If you are small and a single branch, consider the simplest possible way. Try not to get hung up restricting a bunch of access. You can always make things more complicated if the simple way doesn’t pan out. But don’t rule it out from the start. We love getting sign ups with the school registration process.
Student Success Initiative Case Study for Pilot Sites

Library Name: Madera County Library

Student Success Initiative Lead: Patrick Fitzgerald

Type of library: Multiple branch

ILS vendor and product: Horizon 7.5.4.1

Type of school you are partnering with: One school district
Name of school or schools: n/a

Targeted student age (choose as many as apply): Students 5-10 years old (K-5th grade)

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?
Yes- we hope to implement a no fine policy for students in the future.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? 1-2 years

Please provide an overview of your Student Success Initiative, and where you are in the process:
We would like to start with third graders in three local elementary schools within Madera Unified School District. We are still early in the planning stages. We have talked with Madera Unified School District administration and have support for the project.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
Our agreement with the school district will be informal. Right now we have agreed we want to do this project but we still need to investigate how it would best work.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We plan to either get a parental permission or not handle student data.
Do you have a plan on how you will distribute the library cards to the students? No

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. No

Do you have a plan for sustaining your Student Success Initiative? No

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
We would do outreach by staff and volunteers throughout the school. If we scaled up, I like the model that was used by City of Ontario of using different city workers to do outreach in the schools.

What quantitative metrics have you established for measuring the success of your program? n/a

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
- We have clear targets as to schools and grade levels to work with.
- We have established relationships with key personnel.

Please provide us with the following data:
- How many K-12 students are in your community/service area? 31,000
- How many active Juvenile cards does your library currently have? 4,923
- How many student cards have you distributed thus far (if applicable)? n/a

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The school district has been extremely receptive. Our biggest challenges are getting past the hurdles of staffing and our ILS policies.

Do you have advice for libraries considering a Student Success Initiative? No.
Student Success Initiative Case Study for Pilot Sites

Library Name: Monterey Public Library

Name of Student Success Initiative Lead: Ellie Anderson

Title of Student Success Initiative Lead: Youth, Reference, and Outreach Services Manager

Type of library: Single branch

ILS vendor and product: Koha

Type of school you are partnering with (choose as many as apply): One school district

Name of school or schools: The schools belonging to Monterey Peninsula Unified School District which are located with the city of Monterey.

Targeted student age (choose as many as apply): Students 5-10 years old (K-5th grade) Students 11-13 years old (6th-8th grade) Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? No

What is your plan for identifying the student success library card in your ILS? We haven’t figured this out yet

What is your estimated time frame for a roll out for this project? 3-6 months

Please provide an overview of your Student Success Initiative, and where you are in the process:
We plan to issue cards to every public school student in Monterey. That is three elementary schools, one middle school, and one high school. The school district includes other schools, but they are outside our jurisdiction.

We know what we need to do to get the student information entered into our system, so will be able to create cards once agreements are finalized and the district gives us the information.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We have had very positive discussions with our district superintendent. He has given his staff direction to work out an information sharing agreement with us. We have exchanged samples of that type of agreement, as well as a draft MOU and opt-out form. We need to run those by our city attorney and have them approved by the district, but that should go smoothly.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
We will sign an information sharing agreement with the school district.

Do you have a plan on how you will distribute the library cards to the students?
Not yet. We will work with each school to see what will be best for them. We would like to make a fuss, so that kids know it is something special.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We are not creating special cards or otherwise distinguishing these accounts from other library cards, other than perhaps in the record. We do want to communicate to parents and other stakeholders that this is a new and special partnership, but we do not have a plan for that as yet.

Do you have a plan for sustaining your Student Success Initiative? We plan to include the opt-out form in school registration materials and get a new data set each year.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We plan to target school outreach to 1st, 6th, and 9th graders and teach them about the uses of a library card.

What quantitative metrics have you established for measuring the success of your program? We will compare the number of youth cards we had last year to the number we will have after the cards are distributed. We will also monitor circulation stats in the youth and teen collection as well as visits to our youth and teen web pages and databases.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have shared information with our staff so that they are aware of the program. We have made contact with the school district and are working on creating the necessary documentation to allow information sharing.
Please provide us with the following data:
- How many K-12 students are in your community/service area? 3,000
- How many active Juvenile cards does your library currently have? 6,300
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
We were pleasantly surprised by our superintendent’s support, though we knew he was a fan of libraries. It was a challenge to get the superintendent’s attention at first and challenging to find our staff the time to keep the ball rolling.

Do you have advice for libraries considering a Student Success Initiative?
Don’t be discouraged. If your school district does not get back to you, keep getting in touch and eventually you will be able to sit down for a meeting and get things moving.
Student Success Initiative Case Study for Pilot Sites

Library Name: Nevada County Community Library

Name of Student Success Initiative Lead: Lisa Nowlain, Youth Librarian

Type of library: Library system or district

ILS vendor and product: Auto-Graphics, Verso

Type of school you are partnering with: One school district

Name of school or schools: Nevada Joint Union High School District

Targeted student age: Students 14-18 years old (9th-12th grade)

Level of student success initiative card:
Limited access card: 3 physical items, no fine no fee, no restrictions in online materials. All youth can get a regular card as well.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? We are working on modifying our youth fine policy as well, making no fines/fees on youth cards.

What is your plan for identifying the student success library card in your ILS?
Patron type
Identifiable library barcode
Patron Group

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process:
We started the school year with 2 high schools already on an MOU, with Student Success Cards ready to go. We had signed the MOU over the summer and done a data transfer via secure FTP and added 1600 library cards. The district created and distributed Opt-out letters. I created flyers for the schools. This year, we have added the rest of the high schools in the district – the MOU was signed last week. I’m working on creating bookmarks for the schools as well, and edited the Opt-out letter, as I didn’t see it last year and it had some incorrect information (and was missing our logo).
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We had a formal MOU with the Nevada Joint Union High school District. We have a new one that now covers all schools in the district.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
Honestly, no we have not. I haven’t looked into that information. We treat the student data with the same privacy protections as the non-student data and sent our data via secure FTP.

Do you have a plan on how you will distribute the library cards to the students?
We did not create new cards – we used student ID numbers and added school initials to the front of them, ie BRHS111111. We just let the students know that was their new library card number.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
I created flyers for the branches and schools. This year, I’m working on a bookmark.

Do you have a plan for sustaining your Student Success Initiative?
Yes, we’re hoping to grow it beyond the high school district. I have been marketing the possibility at principal’s meetings and professional development days, and added information to our information to educators, in order to find a willing district.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? One of our libraries is a joint-use library inside of a high school, and those cards get used a lot. I’ve had trouble getting the librarian at the other high school to support me coming to the library and doing a pop-up. We hope that the flyers are useful, and that bookmarks and the opt-out letter will be even more useful. Word has been sent out to the English teachers and I’m hoping that more information will be distributed to teachers this year.

What quantitative metrics have you established for measuring the success of your program?
We have measured the number of new cards, circulation statistics, number of books lost.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have not met any of them! We have touched on most of them, however. We did not initiate an MOU with a new district, but we expanded to an entire district, adding 4 new schools. I supported our Youth Librarian in Truckee with the beginning of outreach to her district. We have plans to increase our marketing of the program, but no new marketing plan was born.
Please provide us with the following data:

- How many K-12 students are in your community/service area? 12091
- How many active Juvenile cards does your library currently have? No idea. It is difficult to get this data from our ILS.
- How many student cards have you distributed thus far (if applicable)? 2176

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?

Biggest surprise was how easy it was to get the cards once we’ve signed an MOU, and how we had so few opt-outs. Biggest challenge is getting kids to use them.

Do you have advice for libraries considering a Student Success Initiative?

The advice I heard always was to work with districts that are willing – it’s not worth pushing if you can avoid it. Start with the volunteers and people will hopefully start clamoring for their cards!
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Orange County Public Libraries

**Student Success Initiative Lead:** Beatriz Preciado, Programs Coordinator

**Type of library:** Library system or district

**ILS vendor and product:** SirsiDynix/ Symphony

**Type of school you are partnering with:** Alternative, Community, and Correctional Education Schools and Services (ACCESS)

**Name of school or schools:** ACCESS - La Habra Site

**Targeted student age:** Students 14-18 years old (9th-12th grade)

**Level of student success initiative card:** Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?  N/A

What is your plan for identifying the student success library card in your ILS?  
We are not going to differentiate

What is your estimated time frame for a roll out for this project?  Already started

Please provide an overview of your Student Success Initiative, and where you are in the process:

Orange County Public Libraries has established a partnership with ACCESS. Access serves an average of 7,662 students throughout Orange County. The goal of this partnership is to ensure that upon graduation every student has a library card. There are several ACCESS sites however because of the student population, OC Public Libraries is working with one school site at a time. So far the connection has been made at the La Habra site. Students visited the library and learned about computer accessibility, Virtual Reality, music streaming databases and of course signed up for a library card. The teachers involved have also committed to extra credit opportunities to encourage the students to visit the library and make use of their newly acquired library card.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
Informal agreement. The next school site will be Garden Grove.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? OC Public Libraries is sending library card applications with the students prior to the library visit. Therefore, there is no merge of data.

Do you have a plan on how you will distribute the library cards to the students?
The school has a budget for transportation, although most school locations are walking distance from the local public library, and snacks. Prior to the library visit, either library or ACCESS staff will pick-up library card applications for student distribution. The students are instructed to take these home for parent signature. To help reach as many students as possible, the library card campaign has been designated as a 2-day program. On the first day, the library staff visit the ACCESS site. As part of this visit, staff share the various resources available at the library and collect card applications. If students forget or lose their application, they can bring it the next day to the library tour. On the day of the tour, students will receive their card.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. N/A

Do you have a plan for sustaining your Student Success Initiative?
OC Public Libraries will continue to work with ACCESS and visit all locations. This will be done on a yearly basis. It is a great opportunity to target this age group since there are many resources and services in addition to a library card that they can benefit from such as Lunch @ the Library, Career Online High School (ages 19 and older), Resume Building, Homework Help, and the like.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
Yes, the program involves 2-days of library collaboration with ACCESS staff and students. Also, the teachers have assigned extra credit activities to ensure students return to the library.

What quantitative metrics have you established for measuring the success of your program?
Currently, the number of library cards issues, number of students present at the day #1 training, and number of students attending the library tour.
Out of the milestones you selected at the beginning of the grant year, how many have you reached?
- Identify School District for Library Card Campaign- Reached
- Invite library and school district staff to meet to identify plan of action- Reached
- Kickoff event for Card Campaign/ Community Outreach- First library card campaign has been successfully completed at the ACCESS site at the La Habra Library. The staff at the library will continue to visit the students and staff to promote future programs and services. Additionally, the library card campaign will be hosted again in 2019 at this particular site.

Please provide us with the following data:
- How many K-12 students are in your community/service area? 99,080 children under age 5 and 209,529 children ages 5-14
- How many active Juvenile cards does your library currently have? 81,775 card holders under age 18.
- How many student cards have you distributed thus far (if applicable)? 14

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
Drafting and executing an MOU. Also, the various child information protection guidelines.

Do you have advice for libraries considering a Student Success Initiative?
If the library has multiple branches, it would be best to start with one school or a particular grade level. If some of the staff members already have a connection with a school or teacher, that may be a good starting point.
Student Success Initiative Case Study for Pilot Sites

Library name: Palo Alto City Library

Student Success Initiative lead: Jenny Jordan, Youth Services Manager and Children’s Library Branch Manager

Type of library: Multiple branch

ILS vendor and product: iii Sierra and Encore

Type of school you are partnering with:
Multiple schools
One school district
Name of school: Palo Alto Unified School District

Targeted student age:
Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)
Students 14-18 years old (9th-12th grade)

Level of student success initiative project: Full access card

Do you plan to modify your existing student or youth fine policy?
We already have no fines on children’s items but there are no plans to extent it to teen materials at this time.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 6-9 months

Please provide an overview of your Student Success Initiative, and where you are in the process:
We have implemented a pilot with several classes at one of the Palo Alto Middle Schools to test the technology for the collaboration. It has highlighted a few issues that we are working on correcting before our big launch to all the schools in August. In general it worked well and there is enthusiasm from the teachers that have been involved.

What is the status of creating an MOU or partnership with the school or school district regarding the Student Success Initiative?
We have a signed MOU between the City and the school district
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
We have implemented an opt out policy with full-disclosure to parents about the sharing of student information. We are working on parent education with a brochure and planned visits to PTA meetings, open house attendance, etc. In the pilot very few parents opted out.

Do you have a plan on how you will distribute the library cards to the students?
As mentioned above we are using their student id. numbers with a special barcode one their actual school ID card.

Have you thought about or created any marketing or branding for your Student Success Initiative?
We have decided to call it the Student Asset Card referencing the 40 Developmental Assets. We have done presentations to the school librarians, the Library Advisory Committee and the City Council. We are now working to inform parents and students about the advantages of the card.

Please provide us with the following data:
- **How many K-12 students are in your community/service area?** The Palo Alto Unified School district has approximately 12,000 students.
- **How many active Juvenile cards does your library currently have?** If a juvenile is defined as anyone under the age of 12 and active is defined as having used the library or its services in the last 3 years, we have 4,037. If a juvenile is defined as anyone under the age of 18, then we have 7,795.
- **How many student cards have you distributed thus far (if applicable)?** 66

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
It is a surprise how long everything is taking. The biggest challenge for us has been the privacy issue which seems to have been mitigated at present.

Do you have advice for libraries considering a Student Success Initiative?
Be prepared for it to take longer than you expect. Be prepared to be flexible with regard to partnering with the schools. I would also suggest starting small although we did not.
Student Success Initiative Case Study for Pilot Sites

Library Name: Pleasanton Public Library

Name of Student Success Initiative Lead: Heidi Murphy, Library Director and Teresa Parham, Teen Librarian

Type of library: Single branch

Type of school you are partnering with (choose as many as apply): One school district

Name of school or schools: Pleasanton Unified School District

Targeted student age (choose as many as apply): Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? We are currently piloting a no fines patron type for these students.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process:

- Completed pilot project with freshman class at one high school
- Set-up feedback loop to keep students engaged and learn more about library services
- Expanding to both high schools and grades 9-12
- Will be part of school registration packet process for 18/19 School Year

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We will be returning to School Board and City Council in May for approval to continue this project for 5 more years through an amendment to data sharing agreement. This is in the form of an MOA.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? Provisions for training library staff and protecting student data is written into the MOU and amendments.
Do you have a plan on how you will distribute the library cards to the students? Student IDs will be the library card.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We are using student IDs and have not broached the subject of branding or marketing at this time.

Do you have a plan for sustaining your Student Success Initiative? Ideally we will continue to grow it into the middle schools. Since we are simply using student ID numbers as library cards, the sustainability is mostly in the form of data transfer and communication updates to the students. This low-maintenance approach should make it sustainable with a small staff.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We are currently using MailChimp to send out short and graphically pleasing emails to the students to give them tips on resources in the library and how their cards work.

What quantitative metrics have you established for measuring the success of your program?
Number of students enrolled
Circulation data by patron type

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
We have reached our milestones – with adjustments to the amount of students reached – one class in one high school, renamed a pilot program.

Please provide us with the following data:
- How many K-12 students are in your community/service area? 14,775
- How many active Juvenile cards does your library currently have? 6,790
- How many student cards have you distributed thus far (if applicable)? 76 students opted in for 2017

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
Biggest challenge has been timing, not the technological issues we might have expected. We were not able to have our MOU approved until Oct and school started in mid-August. The first 2 months of the school year are when teachers have orientations in school libraries, which are ideal opportunity to promote the student ID as library card. Also, student planners that are distributed in August have printing deadlines in May. Our new MOU amendments will
not be approved until after that deadline. So, it's a missed opportunity to get information on those planners and in the hands of the students.

For those reasons it's important to have more communication with the school librarians for planning purposes.

**Do you have advice for libraries considering a Student Success Initiative?** Start earlier collaboration with the school librarians for a smooth transition. Decisions about how to promote and educate the students and faculty happen long before the first day of school.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Peninsula Library System

**Name of Student Success Initiative Lead:** San Mateo County Libraries, point person Sandy Wee, Library Services Manager, Access Services

**Type of library:** Library system or district

**ILS vendor and product:** III Sierra

**Type of school you are partnering with:** Multiple school districts, County Office of Education

**Name of school or schools:**
- Ralston Middle School
- Aragon High School
- Burlingame High School
- Capuchino High School
- Hillsdale High School
- Mills High School
- Peninsula High School
- San Mateo High School

**Targeted student age (choose as many as apply):**
- Students 11-13 years old (6th-8th grade)
- Students 14-18 years old (9th-12th grade)

**Level of student success initiative card:** Full access card

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** N/A

**What is your plan for identifying the student success library card in your ILS?** Patron type

**What is your estimated time frame for a roll out for this project?** Already started

Please provide an overview of your Student Success Initiative, and where you are in the process:
The Pacific Library Partnership (PLP) and NorthNet Library System (NLS) received an LSTA grant from the California State Library for a project called Student Success Initiative. The Peninsula Library System (PLS) successfully applied to participate, and joined ten other libraries throughout Northern California in implementing this grant. The purpose of the Student Success Initiative is to help support and develop an efficient and effective way to provide library cards to all youth. In addition to reducing barriers to library access, this project also presents the opportunity for PLS libraries and schools to share data, allowing us to increase our effectiveness, focus our efforts in areas where we are having lesser impact, and demonstrate outcomes that support broader goals and initiatives.
San Mateo County Libraries volunteered to lead the pilot project. With the support of Anne Campbell, County Superintendent of Schools, three school districts were selected to be in the first pilot: San Mateo-Foster City, Belmont-Redwood Shores, and San Mateo Union High School Districts. After implementation of three pilot sites, PLS Youth Services Committee will identify which school districts to partner with.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? In Phase I of the project, we are making informal agreements with the school districts. We have requested basic information to de-duplicate and generate library cards. We are also sharing barcodes with the school district so students will have access to our eResources and physical materials.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
Each school district’s board has limited information on what they can share and we are using what we can to move forward issuing library cards.

Do you have a plan on how you will distribute the library cards to the students?
We are delivering the cards to the school districts for distribution.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
Because we are working with so many different jurisdictions, we will strategize a marketing plan with the individual school districts and involved libraries on branding. For media attention, we will work with our PR manager.

Do you have a plan for sustaining your Student Success Initiative?
After implementation of three pilot sites, PLS Youth Services Committee will identify which school districts to partner with. Point person will work with PLAN and school district on gathering data. All PLS jurisdictions are free to move forward on their own by working with PLAN and public/private school district(s).

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
We are including letters with the library cards that outline everything students can access: homework help, eBooks, eMedia, databases, etc.

What quantitative metrics have you established for measuring the success of your program?
We will be measuring the number of library cards issue to children ages 5-18 since the launch of the Pilot as well as the circulation of J and Teen materials.
Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have reached the following milestones:

- Library has identified how to improve a process for staff to assist with incorporating more school districts in the future.
- Library has established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc.
- The library has identified what level of collaboration we will be able to do with the schools regarding issuing and sharing data (such as using the student ID numbers, how to issue the cards, etc.)

Please provide us with the following data:

- **How many K-12 students are in your community/service area?** 94,000 (public school only)
- **How many active Juvenile cards does your library currently have?** 109,987
- **How many student cards have you distributed thus far (if applicable)?** Approximately 10,000 (one school district plus one middle school in another pilot district)

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?

We were surprised by how eager the pilot school districts were to join the initiative. They were willing to work with us and provide the information that we needed as they want to make the process as seamless as possible. Our biggest challenge is strategizing how to sustain the initiative after the three pilot school districts have been completed. Another challenge has been getting the cards issued by the deadlines we had designated. The process took longer than we had anticipated.

Do you have advice for libraries considering a Student Success Initiative?

We advise libraries to be flexible and to work with the data school districts are willing to provide. Stay positive if you get pushback and identify people within the school district to champion for your project.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Redondo Beach Public Library

**Name of Student Success Initiative Lead:** Donia Sichler, Youth Services Librarian

**Type of library:** Library system or district – Redondo Beach Public Library (City of Redondo Beach)

**ILS vendor and product:** SirsiDynix (Workflows)

**Type of school you are partnering with:** One school district – Redondo Beach Unified School District, Multiple school district

**Name of school or schools:** Redondo Beach Union High School

**Targeted student age:** Incoming High school Freshman (9th grade)

**Level of student success initiative card:** Internet only

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?** No

**What is your plan for identifying the student success library card in your ILS?** We are not going to differentiate

**What is your estimated time frame for a roll out for this project?** Already started

**Please provide an overview of your Student Success Initiative, and where you are in the process:** We are offering an On-line Only card to students. This way they will not need their parent’s signature. It will limit them to our Electronic Resources Only. We are currently looking into allowing digital material access.

**What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?** None

**How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?** N/A

**Do you have a plan on how you will distribute the library cards to the students?** No plan is necessary. We are relying on the students signing up online. The card will then be mailed to them with an explanation on how to upgrade the card to a full service library card.
Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We have been using the attached posters. (see Appendix)

Do you have a plan for sustaining your Student Success Initiative? Yes. We will be visiting the school at the beginning of the new school year and at freshman orientation.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We publicize its uses with posters, verbal reminders, and Facebook postings.

What quantitative metrics have you established for measuring the success of your program? We are comparing our online numbers from October 2017 to current.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have reached 5 out of 5 of our original milestones.

Please provide us with the following data:

- How many K-12 students are in your community/service area? 9,950
- How many active Juvenile cards does your library currently have? 304
- How many student cards have you distributed thus far (if applicable)? 78

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Getting the students to actually sign-up!

Do you have advice for libraries considering a Student Success Initiative?

Do what you can with what you have! Don’t set your numbers too high (or low).
Student Success Initiative Case Study for Pilot Sites

Library Name: Richmond Public Library

Name of Student Success Initiative Lead: Donielle Woods, Branch Librarian

Type of library: Multiple branch

ILS vendor and product: Millennium

Type of school you are partnering with: One school

Name of school or schools: DeJean Middle School

Targeted student age: Students 11-13 years old (6th-8th grade)

Level of student success initiative card: Internet only

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? No, with an internet only card students wouldn’t receive fines

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 6-9 months

Please provide an overview of your Student Success Initiative, and where you are in the process: We are still trying to get in contact with school administrators

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We have not yet made any agreement with the school about the student success initiate

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We have not reached that point in the process

Do you have a plan on how you will distribute the library cards to the students? Our plan was to have the cards distributed to the students during their back to school orientation in their packets along with a parental opt out form

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. No

Do you have a plan for sustaining your Student Success Initiative? Not at the moment, we are still trying to get the program off the ground
Have you thought about ways to ensure that students know how to use their card and make the most out of it? We have considered adding more online resources.

What quantitative metrics have you established for measuring the success of your program? None at the moment.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? None at the moment.

Please provide us with the following data:

- How many K-12 students are in your community/service area? West Contra Costa Unified School District has 32,197 students.
- How many active Juvenile cards does your library currently have? 23,706.
- How many student cards have you distributed thus far (if applicable)? N/A.

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Getting in contact with school administrators.

Do you have advice for libraries considering a Student Success Initiative? Find a school system or teachers that want to participate.
Student Success Initiative Case Study for Pilot Sites

Library Name: Sacramento Public Library

Name of Student Success Initiative Lead: Amanda Foulk, K-12 Specialist

Type of library: Library system or district

ILS vendor and product: Innovative, Sierra

Type of school you are partnering with (choose as many as apply): Multiple school districts

Name of school or schools: Sacramento City Unified School District

Targeted student age:

Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)
Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Internet only

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? Not at this time.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process: It is our goal to set up Student Success card access for every student enrolled in public school in Sacramento. With 14 School Districts to work with, we’ve begun by building on our good relationship with Sacramento City Unified School District as a pilot project. We anticipate adding 2-3 additional School Districts at the beginning of next school year.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We are signing an MOU and Data Sharing Agreement. We have both already signed with Sacramento City Unified School District. We are in the process of approving an MOU with an additional district, and are working with two more.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? The library has requested the minimum information required to create these accounts, and will handle all data in compliance with regulations on public library patron data and school district data.
Do you have a plan on how you will distribute the library cards to the students?
Students can come in to any branch of the library to have a physical card and barcode added to their Student Success account, but can also opt to just use their student ID number with no physical card required.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. We developed a flyer to be send home with students and a landing page on our website.

Do you have a plan for sustaining your Student Success Initiative? We will continue to work on our partnership with Sacramento City Unified School District, and now that we’ve developed some tools and trainings with them we can more effectively roll out the initiative with other districts.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
We plan to communicate with parents, teachers, and students. Currently we are in the process of presenting during a new curriculum training at the district. Over the course of 4 weeks we will have had the opportunity to explain the Student Success Library Cards to 1200 teachers of grades K-6. We also sent home a backpack flyer explaining the initiative to parents.

What quantitative metrics have you established for measuring the success of your program?
Number of youth card holders, use of eResources, active use of student cards.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
All 3 milestones have been achieved to some degree or other – we’ve been rolling out information through several avenues, including the current opportunity to directly share the information with all elementary teachers. The most challenging milestone was creating the marketing strategy to support the project due to capacity on our end.

Please provide us with the following data:
• How many K-12 students are in your community/service area? 244,394 were enrolled in public school in the most recent year for which data is available. There are 300,338 children between the ages of 3-17 in the county.
• How many active Juvenile cards does your library currently have?
• How many student cards have you distributed thus far (if applicable)? We’ve created 40,000 accounts. We aren’t issuing physical cards unless the student requests one at the library.
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The biggest surprise has been how quickly additional districts have expressed interest after we launched our first partnership. The biggest challenge has been communication between our two organizations. Although we have amazing and dedicated staff on both sides, it can be quite the game of telephone trying to move certain aspects of the project along. But we’ve persisted, and we’re really starting to see our partnership develop.

Do you have advice for libraries considering a Student Success Initiative?
We would encourage libraries to ask plenty of questions – don’t hesitate to reach out to libraries who have already been through the process to see what precedents can be found. And then go for it!
**Student Success Initiative Case Study for Pilot Sites**

**Library Name:** Salinas Public Library

**Name of Student Success Initiative Lead:** Renee Gimelli, Senior Librarian, Youth Services

**Type of library:** Multiple branch

**ILS vendor and product:** KOHA

**Type of school you are partnering with:** Multiple schools, One school district

**Name of school or schools:**
Salinas City Elementary School District: (four schools)
El Gabilan, Roosevelt, Sherwood, and Los Padres Elementary Schools

**Targeted student age:** Students 5-10 years old (K-5th grade) (includes 6th graders)

**Level of student success initiative card:**
Limited access card: Virtual card allowing full internet access to databases, eResources, with limit of two physical items (books only)

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?**
Our current fine structure does not charge for late children’s materials, though we do charge lost item fees.

**What is your plan for identifying the student success library card in your ILS?** Student ID

**What is your estimated time frame for a roll out for this project?** 3-6 months

**Please provide an overview of your Student Success Initiative, and where you are in the process:** After getting staff input and deciding on the level of access and type of card, we contacted our target school district in January and met with the Principals in February. In March, we made a decision on the naming of our card (SMA+RT Card). The acronym stands for our collaborative goal – Salinas Makes A+ Readers Together. We also conducted tests of the log-ins for our several digital resources to ascertain the efficacy of using a Student ID for card number. We are currently researching the Clever interface which the school uses and getting more information on student access to internet when away from school. This school district is currently moving into a one-to-one model where each student will receive a Chrome Book, but it has not yet been determined whether these devices will go home with the students. Our next actions will be to contact school librarians and parent coordinators to explain the initiative and demonstrate the access points. We are in the process of assigning liaison librarians for each school and letting staff collaborate on learning tools that we can use to train teachers and
parents and students. Our marketing campaign has begun with exploration into messaging, mediums, and distribution. Our director is also interested in added-value services such as delivery of requests to schools, allowing teachers and students to place book requests and have them delivered directly. In May, we will be testing our processes and in June, we will be visiting school parent clubs and staff development days. In August, our partnership will include website development so that both the library and each school website has links to the opt-out form and information. We are also exploring the idea of a teacher resource page to help direct class visit requests, assignment alerts, and a newsletter for information updates. In September, we will implement our first data transfer of directory information from the school.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We have an MOU in place, which has been signed by both the School Board and the Salinas City Council.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
Yes, we will be collecting only directory information as allowed by FERPA.

Do you have a plan on how you will distribute the library cards to the students?
These are virtual cards, so no distribution is necessary.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Our branding will focus on the name “SMA+RT Card.” We have not developed a logo or icon yet.

Do you have a plan for sustaining your Student Success Initiative?
Our city includes four high schools, six middle schools, and 30 elementary schools. It is an ambitious project to get over 35,000 students enrolled in the initiative, so we plan to work our way through the districts. Our short-term goal is to enroll all of the remaining 10 schools in the Salinas City Elementary School District first, then pursue an MOU with the other districts. This is a “big, hairy, audacious goal” and will be a multi-year project.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
We are planning to conduct training sessions, using the school librarians as our conduit to the students. Teachers will receive group trainings through their staff development days. We will also be distributing “instruction” sheets, bookmarks, and other print collateral that will help establish the process for using the SMA+RT Card.
What quantitative metrics have you established for measuring the success of your program?
Benchmarking our success will include increased class visits from schools and librarian visits to schools. By establishing a library liaison, we hope to develop a stronger relationship between the school and the public library. This will help in increasing our program attendance, circulation, and website visits, as well as database and eResource usage. All of these metrics will be important for determining our success. It would be extremely valuable to have shared information from the school regarding student reading achievements, test scores, and improved grade level reading numbers.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
We have met all three of the milestones indicated in our original submission to PLP. We have also fulfilled all eleven milestones indicated in the resource guide.

Please provide us with the following data:
- How many K-12 students are in your community/service area? 36,000
- How many active Juvenile cards does your library currently have? As of April 1, 2018, we have 2,148 active juvenile cards.
- How many student cards have you distributed thus far (if applicable)? None, yet

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
Getting the MOU in place and approved has been surprisingly easy. It has been a nice surprise to have exceptional buy-in from district personnel and the principals have been very pleased with the idea. The biggest challenge has been determining how the data will be transferred and whether the Student ID is a viable log-in (entry point) for the various databases and ebook vendors.

Do you have advice for libraries considering a Student Success Initiative?
Schools and public libraries are natural partners in the education of our students, and in most communities, it behooves teachers and school personnel to welcome public librarians into their world. Unfortunately, teachers have very busy schedules and limited time in which to teach their students the things that are required. This means that for us to have a good working relationship, we have to make this easy and effortless for teachers.
Student Success Initiative Case Study for Pilot Sites

Library Name: San Diego Public Library

Name of Student Success Initiative Lead: Emily Derry, Youth & Engagement Coordinator

Type of library: Multiple branch

ILS vendor and product: SirsiDynix WorkFlows

Type of school you are partnering with: Eventually extending to entire District, we are starting with four Target Schools within the Logan Heights Branch Library service area.

Name of school or schools: Sherman Elementary, Perkins K-8, Logan K-8, and Burbank Elementary

Targeted student age: Eventually including all schools in the district, including High Schools, but beginning with Target Schools: 2 K-5th grade schools and 2 K-8th grade schools.

Level of student success initiative card: Limited access card: Access to online resources and computer use. Limited number (2) books allowed for checkout until account is upgraded by parent/guardian.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? System-wide elimination of overdue fines is currently being considered by the City Council and is expected to be adopted.

What is your plan for identifying the student success library card in your ILS? Proposed use of Student ID as an alternative or additional access tool.

What is your estimated time frame for a roll out for this project? Initial rollout 6-9 months, stages laid out to achieve ultimate goal of entire District by 3 ½ years.

Please provide an overview of your Student Success Initiative, and where you are in the process:
We have gained buy-in from our library executive team and technology services staff and have a vision for creating a sustainable and successful program. The goal is to issue physical library cards to all students in the four Target Schools after receiving student data. No paper or online applications will be utilized. The Logan Heights Branch Library staff and school staff will determine how best to distribute library cards to students. We will be meeting with San Diego Unified School District this summer to further discuss the program.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?

We intend to create a MOU to be signed by the Library and District. We have a commitment letter signed by the Mayor, the District Superintendent, and the Library Director.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?

We intend to provide opt-out forms for parents/guardians in order to bypass the paper application process. Ideally, we can automatically import student data through a FERPA compliant process; the details of which will be determined as we continue to flesh out the program.

Do you have a plan on how you will distribute the library cards to the students?

During the initial phase, Logan Heights Branch Library staff and Target School staff will determine how best to distribute library cards to students. Formal plan implementation will be considered, as necessary, for later phases.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.

We will be creating a marketing plan and materials for distribution to schools and library users. Design has not yet begun.

Do you have a plan for sustaining your Student Success Initiative?

Our phased plan extends through September 2021. Continuous reevaluation and adjustment will be made throughout to ensure the success of each phase and the sustainability of the program. We will continue to issue cards to new and incoming students beyond our final phase.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?

Initially, instruction from a librarian will be included with the distribution of the cards, e.g. the class will visit the library for a tour, introduction to library resources, and demonstration; or a librarian will visit the school and offer instruction on library resources and use. Reevaluation of this process, as the program grows, may be needed.

What quantitative metrics have you established for measuring the success of your program?

Our goal is to increase the amount of library accounts in the library branch’s service area by approximately 9%, from the current reach of 71% to 80% of the service population.
Out of the milestones you selected at the beginning of the grant year, how many have you reached? Five milestones were identified at the beginning of the grant year. We have achieved four which include:

- Library staff are aware of this project and I have formed a team to work on this project.
- We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc.
- The library has created a timeline for this project, and is flexible, knowing that the dates might shift.
- The library has identified one or more key persons with the school or school district.

We will be actively working towards the fifth:

- The library has created a marketing strategy to support this project.

Please provide us with the following data:

- How many K-12 students are in your community/service area?
  The 2017 estimate of all people ages 5-14 in the Logan Heights Branch Library service area is 4,067. Specifically, the total enrollment K-12 of the four Target Schools is 2,075 students.

- How many active Juvenile cards does your library currently have?
  As of December, 2017, the Logan Heights Branch Library reports that 1,487 children/teens between the ages 5-14 have library card accounts.

- How many student cards have you distributed thus far (if applicable)?
  None, as of yet.

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Staff oversight interruptions; having the lead out on leave has put a hold on some of the larger steps, however, having interim staff input has created the opportunity to consider new ideas and perspectives.

Do you have advice for libraries considering a Student Success Initiative? N/A
Student Success Initiative Case Study for Pilot Sites

Library Name: San Leandro Public Library

Name of Student Success Initiative Lead: Loryn Aman, Teen Services Librarian

Type of library: Multiple branch

ILS vendor and product: Sirsi Dynix WorkFlows

Type of school you are partnering with: One school (pilot program), One school district (complete program)

Name of school or schools: John Muir Middle School

Targeted student age: Students 11-13 years old (6th-8th grade), Other: all K-12 students

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? TBD

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 6-9 months

Please provide an overview of your Student Success Initiative, and where you are in the process:
San Leandro Public Library (SLPL) will streamline student access to public library databases, print and e-materials by integrating San Leandro Unified School District (SLUSD) Student ID numbers and SLPL Library accounts. This joint Student ID/Library Card will be called the San Leandro Scholar Card, and will ultimately allow every student in SLUSD schools seamless access to Library databases and materials.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We will pilot the Scholar Card at one district middle school, John Muir. Currently, we have verbal support from John Muir’s school librarian and principal. We have drafted an MOU which is in review with the SLUSD. Launch could happen as early as January 2019.
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? SLPL and SLUSD agree that each entity shall comply with applicable federal and state laws relating to the registration and circulation records in libraries supported by public funds. It also governs the disclosure of record information.

Do you have a plan on how you will distribute the library cards to the students? TBD

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. No branded materials have been created at this time.

Do you have a plan for sustaining your Student Success Initiative? After the rollout with our target site, we will implement a plan to roll-out the cards district wide, which will include a sustainability plan.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Outreach and education on scholar cards will include a combination of school site visits, print materials and video training targeted to both students and parents.

What quantitative metrics have you established for measuring the success of your program? Success metrics will be established at the conclusion of our pilot program prior to district-wide rollout and will include # of cards issued, # of cards activated, increase in active cardholders by age, and if possible, increase in site visits and database use over previous year when scholar cards were not available.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have reached 1 out of 3 benchmark milestones.

Please provide us with the following data:

- How many K-12 students are in your community/service area? There are 8,700 students in the SLUSD. The Library also serves select schools in SLZUSD (approx. 2,000 students) and 5 private schools (500-1,000 students).
- How many active Juvenile cards does your library currently have? 6,103 of children ages 5-18 currently have library cards.
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? The lead for this student success initiative has been on leave since early March and won’t return until mid-August, so the project is on hold until her return.

Do you have advice for libraries considering a Student Success Initiative? No.
Student Success Initiative Case Study for Pilot Sites

Library Name: County of San Luis Obispo Public Libraries

Name of Student Success Initiative Lead: Margaret Kensinger-Klopfer, Coordinating Librarian, Youth Services

Type of library: Multiple branch (15 branches)

ILS vendor and product: Polaris

Type of school you are partnering with: One school district

Name of school or schools: Shandon Unified School District

Targeted student age: Students 5-10 years old (K-5th grade), Students 11-13 years old (6th-8th grade), Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? Yes, we are already looking into removing all fines on juvenile materials and have just changed our teen card policy to allow middle and high school students to get a card using just a current student ID.

What is your plan for identifying the student success library card in your ILS? We put an identifier in the patron registration notes field for these cards to track student success cards.

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process: Our library has already partnered with the Shandon Unified School District and distributed Opt in letters to parents for library cards, received data for the students whose parents opted into the cards, created the library cards, and distributed the cards for all opt in students. We are now looking to the next year to determine how to keep this partnership going and considering how to expand to additional school districts in the future.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We have an informal agreement for the Student Success Initiative. We have an agreement with the superintendent of schools to continue this program in the next year. We will be looking into creating a formal agreement for future years to come.
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? All student data is received by the library from the school district, through an “opt in” letter approved by the school superintendent. After receiving the data, it is put into Polaris.

Do you have a plan on how you will distribute the library cards to the students? Our library was able to distribute some cards to classes that visited the library. For classes that were unable to get permission slips distributed to students in order to visit the library we brought the cards to the school for teachers to distribute.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Not yet, but we would love to hear more about this.

Do you have a plan for sustaining your Student Success Initiative? Our library is setting up a meeting with the superintendent of schools to help create a plan for sustaining the initiative into the future. The superintendent has already agreed to put the “opt in” form for student data sharing in the new kindergarteners and transfer students registration packets. We will also be looking to see how we can expand to other school districts after our first year at Shandon is complete.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Our library has partnered with teachers and school librarians to help educate students on how to use their card and how the library works. We have arranged school visits to explain what the library is, and also included information on how to use the library card when the cards were handed out. We will be developing ways to help parents understand this as well.

What quantitative metrics have you established for measuring the success of your program?

Our library measured the following benchmarks

- **x- number of children ages 0-18 currently have library cards in Shandon.** Since we are piloting the student success initiative in the Shandon Unified School District, which is geographically removed from other areas in the County of San Luis Obispo, we would like to measure how many children in the town have library cards. At the beginning of our pilot only 24 children had active library cards in Shandon. Now over 191 kids have active library cards.

- **Shandon Library currently issues X- number of new library cards to children ages 0-18 annually.** At the start of our pilot Shandon Library had issued 5 new juvenile library cards in the previous year. Our County generated 167 new cards as part of the library success program.
Library currently circulates X-number of J and YA materials annually at the Shandon Library. In the entire 2016-2017 year the Shandon Library circulated 1300 J and YA materials. In the month after we distributed library cards, the Shandon Library circulated 400 unique items. We hope to see this trend continue.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?
We reached all (3) three of our milestones, to some degree.**

- The library staff is aware of this project and we have formed a team to work on this project. The team consists of Coordinating Librarian for Youth Services, the Branch Manager at Shandon Library, the North County Regional Supervisor, and the head of Support Services. We are also partnering with the school librarians and the District Superintendent at the Shandon Unified School District.

- We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc. For our pilot we are working to establish a partnership with the elementary, middle, and high schools in the Shandon Unified School District. We wanted to create library accounts for all the students at each of the schools. **While we were able to create library cards at all of the schools in the district we were only able to create cards for 167 out of the 277 students, due to parents not giving permissions for data to be shared.

- The library has held one or more meetings, and has communicated the goals of the project. The branch manager, the regional manager, and Coordinating Librarian for Youth Services was able to hold an initial meeting with the Shandon Unified School District Superintendent to establish contact and communicate the goal of getting every youth in the district library cards. We were also able to create, and get approved, a letter to go home to parents to get permission to share student information to get them library cards. We are going to hold a follow up meeting soon to discuss how to keep this program going. Overall, we held 3 meetings so far to develop the program and communicate the goals, with lots of additional emailing.

Please provide us with the following data:

- How many K-12 students are in your community/service area? 27,000 K-12 students in the San Luis Obispo County Library service area, 277 in the Shandon Unified School District
- How many active Juvenile cards does your library currently have? 7,987 (2016-2017) juvenile cards in the San Luis Obispo County Library service area, 191 in the Shandon Unified School District (following our Student Success program)
- How many student cards have you distributed thus far (if applicable)? 167 cards for Shandon students since March of 2018
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The biggest surprise was how few kids knew what the library was and how it worked. Many families thought that you had to pay a “membership” to join the library and get a card. We were able to get many kids library cards for the first time and help them start to use the library. This led to our biggest challenge, that parents thought once kids joined the library that we provided free daycare after school. Things improved immensely after library staff spoke with the teachers and explained to the kids (and the parents, by proxy) how to have a good time in the library without getting over-exuberant or destructive.

Do you have advice for libraries considering a Student Success Initiative?
My advice would be to start small and celebrate all victories. Even getting one school signed up for library cards can change the way your library functions in your community, going from a place that is intimidating to a place that is welcoming and inclusive. Schools are a great way for libraries to connect to kids in our community, so it is worth any delays or red tape.
Student Success Initiative Case Study for Pilot Sites

Library Name: Santa Cruz Public Libraries

Name of Student Success Initiative Lead: Heather Norquist, Regional Manager

Type of library: Library system or district

ILS vendor and product: Polaris

Type of school you are partnering with: Multiple schools, Multiple school district, County Office of Education

Name of school or schools: Too many to list

Targeted student age: Students 5-10 years old (K-5th grade): For the first year, we are targeting 1st grade.

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?
Yes, we are working to eliminate overdue fines on J and YA materials.

What is your plan for identifying the student success library card in your ILS? We haven’t figured this out yet

What is your estimated time frame for a roll out for this project? 1-2 years

Please provide an overview of your Student Success Initiative, and where you are in the process: We’ve established contact with all first grade teachers, all public elementary schools and all school districts in our service area. We have invited all first grade classes to come to the library or have a librarian visit their classroom and get library cards. We have developed a fine policy to eliminate overdue fines on materials for children and teens, which is in the approval process. We have attended a COE Professional Development meeting to connect with the LMTs in our county. We are currently setting up appointments with school district superintendents to talk about the MOU possibility.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? We would like to have an MOU agreement with the school districts and are just beginning the conversation.
How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We need to find out more about this and are just beginning the conversation.

Do you have a plan on how you will distribute the library cards to the students? Yes, we’ll go to the classes to deliver the cards.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. No.

Do you have a plan for sustaining your Student Success Initiative? Once it’s in place it will be easy to sustain, as long as we have the staffing levels we need. We have buy-in from our administration.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? Yes, through class visits and teacher/parent education.

What quantitative metrics have you established for measuring the success of your program? We can compare the number of class visits and number of first graders with library cards with those numbers from previous years.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? All of them! Our goal was that 50% of first graders in public schools would have library cards during this first year of our work on the initiative. We are ¾ through the year and already 58% of first graders have cards!

Please provide us with the following data:
- How many K-12 students are in your community/service area? 24,763
- How many active Juvenile cards does your library currently have? 5,760
- How many student cards have you distributed thus far (if applicable)? n/a

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? How much work it is. How reluctant one particular district has been to share student data.

Do you have advice for libraries considering a Student Success Initiative? Take baby steps. Try to get support staff to help with card processing. Work with mentors. Meeting early on is best, so that you have a clear overview of the process.
Student Success Initiative Case Study for Pilot Sites

Library Name: Santa Barbara Public Library

Name of Student Success Initiative Lead: Molly Wetta, Senior Librarian

Type of library: Multiple branch

ILS vendor and product: Polaris ILS 6.0

Type of school you are partnering with: Plan to begin by partnering with one school district, then branching out from there.

Name of school or schools: Santa Barbara Unified School District

Targeted student age: Begin with junior high students and expand from there.

Level of student success initiative card: Ideally a full access card, potentially with restrictions on the number of physical items that can be checked out at a time.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? Yes. We’re working on a way to make the cards fine free.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 1-2 years

Please provide an overview of your Student Success Initiative, and where you are in the process: We are currently in the process of creating connections in the school district and highlighting the resources we have available to help students succeed. As we gain advocates through this process, we plan to begin formal discussions about data sharing and implementation with the school district in the next year. Our goal is to have the project be district-wide by 2020.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? While we currently have no formal discussions about the project in progress, we hope to create a formal agreement with the school district without the need for an MOU.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We would, as with all our patrons, be vigilant on protecting the privacy of the students’ data. We also would not collect student addresses, as, with a fine-free card, there would be no need for us to store that data.
Do you have a plan on how you will distribute the library cards to the students? Ideally, we would drop off cards at each school to be distributed by home room teachers. This would be paired with class visits and/or assembly presentations by library staff to introduce students to the library, its resources, and how their card works.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Not yet.

Do you have a plan for sustaining your Student Success Initiative? We have a plan for incoming students at the beginning of the year, but not outside of those confines as of yet.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We would incorporate information about the cards into our outreach at each school. We would also have information available on the Library’s website and send out an information sheet with each card when it is distributed to the students.

What quantitative metrics have you established for measuring the success of your program? We would look at the change in the number of students ages 5-17 that have active library cards registered at the Central and Eastside branches, the number of school visits to the library that occur each year, and the number of outreach visits by library staff that occur each year.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? We have identified the key staff at the district level to begin the conversation with, and have all of the district librarians on board with the project advocating on its behalf. We began school visits in Spring 2018 and have a plan to schedule increased visits to classes and libraries for Fall 2018.

- How many K-12 students are in your community/service area? 14,335 (SBUnified school district)
- How many active Juvenile cards does your library currently have? 5,033 (2/21/18 – excluding ages 0-4)
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Perhaps our biggest challenge has been the creation of previously almost nonexistent relationships with the schools on a district level. We have made wonderful strides in the right direction, but it has taken time to foster that relationship before moving forward. Another challenge that unexpectedly presented itself was staff time to tackle the formalities of the project as the Thomas Fire and subsequent Debris Flow drastically changed the community’s priorities for several months. Though we were able to host displaced students, introduce them to the library, and create library cards for them, no formal progress was made on this project as the library faced increased workflow and the school districts were coping with their truncated semesters.
Do you have advice for libraries considering a Student Success Initiative? To quote the Avett Brothers: “Decide what to be, and go be it.” If you decide that you’re going to make it happen, you can make it happen. Just embrace the knowledge that it won’t go precisely as you plan and keep moving forward!
Student Success Initiative Case Study for Pilot Sites

Library Name: Solano County Library

Name of Student Success Initiative Lead: Mark Flowers, Supervising Librarian

Type of library: Multiple branch

ILS vendor and product: CARL.X

Type of school you are partnering with: Multiple school district

Name of school or schools: Vallejo City Unified School District, Fairfield Suisun Unified School District, River Delta Unified School District

Targeted student age:
Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)
Students 14-18 years old (9th-12th grade)

Level of student success initiative card: Limited access card: 3 print items per card; Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? For our partnership with FSUSD, we are implementing cards which will accrue no fines. Lost or damaged items will not send the card to Collections, but will block usage until the item is paid for or replaced.

We plan to eventually roll this plan out to the rest of the school districts in our service area, but in the meantime, we are continuing to aggressively push manual library card sign-ups in the other school districts. These cards are regular, full access cards which accrue fines and fees.

What is your plan for identifying the student success library card in your ILS? Student ID Patron type

What is your estimated time frame for a roll out for this project? Already started

Please provide an overview of your Student Success Initiative, and where you are in the process:
We started last year in our smallest branch, Rio Vista, where we partnered with DH White Elementary School (of the River Delta Unified School District). We have continued this partnership in the 2017-18 school year, and close to 85% of these students have Solano County Library cards. In addition, we piloted last year, and continued this year, a mobile library for DH
White, bringing Solano County materials directly to students once a week. At these mobile library sessions, 100% of students who have a card have checked out at least one book.

In Vallejo, we have taken a number of steps. First, we partnered with two private K-8 schools, sending library card applications home with every student, along with a letter signed by the principal stressing the importance of public libraries. We issued library cards to 67% of the students at these two private schools.

Next, we began meetings with Vallejo City Unified School District officials and developed a plan to target the third grade classes at all elementary schools. We did not get participation from all elementary schools, but of those we did, we issued cards to almost precisely 50% of students.

Finally, our most recent, but soon to be most significant step, is our new partnership with the Fairfield Suisun Unified School District. FSUSD has been very excited to partner with us on various projects in the past, and actually came to us with the idea of getting library cards for their students. Here, we have been working directly with several members of the administration to develop an MOU which would eventually issue limited access library cards to every student (who does not opt-out) at FSUSD.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We are currently in the process of drafting an MOU with FSUSD. Our partnerships with the other school districts/schools are more informal.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? FERPA compliance is included in our draft MOU.

Do you have a plan on how you will distribute the library cards to the students?
For FSUSD, not yet. For Vallejo and Rio Vista, we are still using old fashioned methods of creating cards and bringing them classroom by classroom to students.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. Not yet.

Do you have a plan for sustaining your Student Success Initiative?
We are working on creating an evaluation tool to determine how well the MOU with FSUSD accomplishing the goals of both the District and the Library. After we evaluate that process, we fully expect to expand the project to the other school districts in our service area.
Have you thought about ways to ensure that students know how to use their card and make the most out of it? Part of our MOU with FSUSD will include language around outreach in both directions, to ensure that students know how to use their cards, where their library is, and have access to library materials.

What quantitative metrics have you established for measuring the success of your program? In process.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?

- The Library staff are aware of this project and I have formed a team to work on this project.
  
  *Completed – all staff at my branch are thoroughly aware of the project. We have a County-wide team to work on the FSUSD MOU, and at the Vallejo level, I am working with my children’s librarian.*

- We have established clear targets for our initiative, such as the school district, private schools, etc.

  *Completed. This shifted a bit over the course of the year, but we are now locked into targeting FSUSD for Fairfield, DH White Elementary for Rio Vista, and the third grade public school students for Vallejo.*

- The Library has identified one or more key persons with the school or school district

  *Completed. We have multiple key contacts at all schools and districts involved.*

- The Library has created a timeline for this project, and is flexible, knowing that dates might shift

  *Completed. The MOU is to be completed by the end of this school year, with implementation to begin at the beginning of next year. The Vallejo and Rio Vista projects’ timelines are more flexible but are generally ongoing.*

Please provide us with the following data:

- **How many K-12 students are in your community/service area?**
  
  There are approximately 64,000 students in all of Solano County
  
  In FSUSD there are 21,000
  
  In VCUSD there are 14,000
  
  In Rio Vista there are 1,000

- **How many active Juvenile cards does your library currently have?**
  
  We appear to currently have approx. 20,000 students registered for library cards, but those are all standard, full access cards, not part of the SSI project.

- **How many student cards have you distributed thus far (if applicable)?**
  
  In Vallejo, we have distributed approximately 750 cards.
  
  In Rio Vista, we have distributed approximately 290 cards.
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
The biggest challenge for me personally was changing gears when our system decided to pursue an MOU with FSUSD. I had been planning on focusing on VCUSD and had to put a lot of plans on hold to wait for the outcome of that MOU. Nevertheless, the chance to partner with FSUSD was a huge opportunity and in the long run is going to be a huge advantage to the project. One of the things that was somewhat surprising about the partnership with FSUSD is how excited they were to participate and how few barriers they put up in terms of privacy, etc. They really wanted to work with us to get cards to as many students as possible.

Do you have advice for libraries considering a Student Success Initiative? No.
Student Success Initiative Case Study for Pilot Sites

Library Name: Sonoma County Library

Name of Student Success Initiative Lead: Kathy DeWeese, Youth Services Administrator

Type of library: Library system or district

ILS vendor and product: Sirsi/Dynix Horizon

Type of school you are partnering with:
One school district
Multiple school district
County Office of Education

Name of school or schools:
Santa Rosa City Schools
Healdsburg Unified School District
Roseland School District
Rincon Valley Unified School District

Targeted student age:
Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)
Students 14-18 years old (9th-12th grade)

Level of student success initiative card:
Limited access card:
  o Full use of online resources
  o Check out up to ten physical items
  o Restricted items include: video games, DVDs, Discover & Go, and streaming media

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? We did adopt a new policy that allowed us to eliminate fines for these Student Success accounts

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? Already started
Please provide an overview of your Student Success Initiative, and where you are in the process:
We rolled out our Student OneCard program with one of our 40 school districts in March 2018. Santa Rosa City Schools serves about 16,000 students in grades TK-12. We have a signed MOU with another school district to launch in the new school year, and we are actively pursuing agreements with two other school districts.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We do have formal agreements with MOUs with the school districts, and this was one of our benchmarks for the project.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
We included a statement in both our MOU and our Library Policy that addresses privacy of student data in compliance of FERPA. We also are instituting a mandatory training of all library staff on the library’s Confidentiality of Records Policy, to ensure that staff understands the importance of maintaining privacy of data.

Do you have a plan on how you will distribute the library cards to the students?
Our Student OneCard initiative does not include physical cards.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
We did create a logo for branding the Student OneCard. We’ve also worked with our partners to develop informational flyers and opt-out forms, which we based on samples provided by mentor libraries in the Student Success Initiative.

Do you have a plan for sustaining your Student Success Initiative?
We have hired a new position that will coordinate educational initiatives for the library system, and this position will take leadership on the Student Success Initiative. Our goal is to roll it out to all 40 school districts in our county.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
In the one district we are currently actively using Student OneCards, we have been actively providing outreach to teachers and students to provide instruction on using the OneCard accounts and the library resources they allow students to access.
What quantitative metrics have you established for measuring the success of your program?

- **Library currently has X-number of MOUs with various schools and school districts**
  This is a goal in our strategic plan, so it will help us to quantify partnership growth.
- **X-number of children ages 5-17 currently have library cards.** Our first district we are launching with is a K-12 district, so we are working with all age ranges of children.
- **Library currently circulates X-number of J materials annually**
  Hoping that materials usage will increase with this project.

Out of the milestones you selected at the beginning of the grant year, how many have you reached?

- **We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc.**
  We planned to launch across all grade levels K-12, with a goal of 16,000 Student OneCard accounts created in FY18. We aimed for a minimum of one outreach visit per school in this district, to educate and instruct teachers and students on how to use the Student OneCard.

- **The library has identified what level of collaboration we will be able to do with the schools regarding issuing and sharing data (such as using the student ID numbers, how to issue the cards, etc.)**
  We used Student ID numbers and regular student data uploads to create the virtual Student OneCard accounts.

- **The library has considered and identified steps to protecting the privacy of student data.**
  We built several safeguards into our MOU and our Commission-approved policy to ensure privacy of student data. We are still working on implementation of annual mandatory all-staff refresher training on the library’s Confidentiality of Student Records policy.

Please provide us with the following data:

- **How many K-12 students are in your community/service area?**
  70,449, taken from 2017-18 data on California Dept. of Education Dataquest site.
- **How many active Juvenile cards does your library currently have?** We do not have separate Juvenile cards, but we have 53,185 cards held by patrons age 0-17.
- **How many student cards have you distributed thus far (if applicable)?** We have not distributed physical student cards, but we have created 16,290 Student OneCard accounts.

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?

One challenge has been working with the expectations and stumbling blocks for data sharing that differ between school districts. One school district will not allow us to use student ID...
numbers, while another school district was more concerned about how to record address information for students who are homeless. We get one issue solved with one district, and the next district’s concern is something completely different.

One surprise was how quickly we were able to negotiate our second MOU, once we had launched the first district. It took us a year to finalize the MOU with the first school district, a process that included legal review, lots of meetings, and selling of the concept to different levels of administration. When we brought the concept to another school district, they informed us that they used the same legal counsel as the first school district and therefore just rubber-stamped the process, pending approval by their School Board.

Do you have advice for libraries considering a Student Success Initiative?

Get stakeholders involved at all levels to ensure that the process moves smoothly:

- Director/Admin/Governing Board to ensure they understand the desired outcomes and support the devotion of resources to the project
- IT department to figure out logistics of how it will work with your ILS
- Librarian staff to understand the value and be able to sell it to their school/teacher contacts, and to plan and deliver outreach training to schools
- Graphics/Marketing to create a branding and market to schools/parents
- Circulation/Front line staff to understand how to help students coming in with a new kind of account, and to be aware of potential workload changes
- HR/Training staff to help institute and monitor new staff trainings
- School district contacts, to present proposals and share information about what the Library can offer with this partnership, and then to work together on logistics. Help them with their internal marketing to individual schools

If you have you created any documents or forms (letters to school superintendents, MOUs, etc.), please attach them with this questionnaire.

Attached documents include: (see Appendix for attachments)

- Student OneCard and Educator Card Policy
- Memorandum of Understanding between Sonoma County Library and Santa Rosa City Schools
- Student OneCard logo
- Student OneCard promotional flyer for SRCS
Student Success Initiative Case Study for Pilot Sites

Library Name: Sutter Public Library

Student Success Initiative Lead: Chalese Eggleston, Children’s Services Coordinator

Type of library: Multiple branch

ILS vendor and product: Sierra

Type of school you are partnering with: One school district

Name of school or schools: Franklin School District

Targeted student age:
Students 5-10 years old (K-5th grade)
Students 11-13 years old (6th-8th grade)

Level of student success initiative card: Limited access card: 2 item check-out. Full internet access.

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative? SSI cards will not accrue fines.

What is your plan for identifying the student success library card in your ILS? Student ID

What is your estimated time frame for a roll out for this project? 6-9 months

Please provide an overview of your Student Success Initiative, and where you are in the process:
We are currently working with one school district to issue cards to all their students. We previously attempted working with a different district and never received any response.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative? MOU pending

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)? We do not share info.
Do you have a plan on how you will distribute the library cards to the students?
We will deliver to the school and let them distribute.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study. N/A

Do you have a plan for sustaining your Student Success Initiative?
We hope to continue communication with the partnering districts.

Have you thought about ways to ensure that students know how to use their card and make the most out of it? We will create a handout.

What quantitative metrics have you established for measuring the success of your program?
We will track usage in Sierra with a special PCode.

Out of the milestones you selected at the beginning of the grant year, how many have you reached? N/A

Please provide us with the following data:
How many K-12 students are in your community/service area? 1,8629
How many active Juvenile cards does your library currently have? 22,000
How many student cards have you distributed thus far (if applicable)? N/A
What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative? Administrator’s willingness and non-willingness to participate.

Do you have advice for libraries considering a Student Success Initiative? Don’t give up.
Student Success Initiative Case Study for Pilot Sites

Library Name: Thousand Oaks Library

Name of Student Success Initiative Lead: Charlotte Burrows, Children & Young Adult Services Supervisor

Type of library: Library system or district

ILS vendor and product: Innovative Interfaces, Inc. – Sierra

Type of school you are partnering with:
One school district - Conejo Valley Unified School District which has 17 Elementary, 5 Middle, 3 High, 2 alternative schools

Name of school or schools: For Phase I of our initiative we will focus on the 17 Elementary schools and specifically Kindergarten classrooms.

Targeted student age:
Students 5-10 years old (K-5th grade) - Phase I (Kindergarten only)
We hope to increase the program in following years to include all students in the school district.

Level of student success initiative card: Full access card

Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?
Not initially, but will reevaluate adjusting the fine policy for SSI Cards during planning for the next new City budget fiscal cycle, 2019-2021.

What is your plan for identifying the student success library card in your ILS? Patron type

What is your estimated time frame for a roll out for this project? 3-6 months (Begin the roll out in September 2018.)

Please provide an overview of your Student Success Initiative, and where you are in the process: Thousand Oaks Library will begin the SSI by focusing on visiting kindergarten classes throughout the Conejo Valley Unified School District. We would like to name or brand the program “Planting seeds - Growing mighty readers” to capitalize on the oak theme of our city and library. Following the program used by our mentor library (Ontario), we will enlist city personnel to visit kindergarten classrooms to read a book to students, distribute library cards, and promote library services. Children would be given inactive library cards and would need to
return to the library to activate their card with their parent or guardian. The cards will have a sticker with the slogan in order to distinguish them from regular patron cards. They will be distributed with an invitation to the parents to come to the library for special event, “Kindergarten Fair” or library night at which time parents can register the cards.

What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
Currently there is not a formal agreement or MOU with the school or school district for Student Success Initiative although this would eventually be a goal or desire of the library. The agreement between Thousand Oaks Library and Conejo Valley Unified School District is informal and has been established after multiple meetings and discussions between the Library Director and the Superintendent, library administration and the District Student Support Services Director and other school district personnel.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
For the beginning phase of our project we would not be requesting student data from the school district. Parents/guardians will come into the library with their student to activate their library card and provide information for their student, which would be handled within regular library privacy and confidentiality policies.

Do you have a plan on how you will distribute the library cards to the students?
Yes, for Phase I of our initiative, library cards would be distributed to all kindergarten students through a visit to individual schools and kindergarten classrooms. Each kindergartener would be given a card with a packet or library brochure.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
As previously mentioned we would like to market or brand Phase I of the Student Success Initiative as Planting Seeds- Growing Mighty Readers. As we go to each Kindergarten class for visits to promote this program and the library plans to have promotional materials coordinated with the program theme.
- Acorn/slogan sticker.
- Lanyard with card holder.
- Book gifted to each classroom
Do you have a plan for sustaining your Student Success Initiative?
- Phase I and ongoing - Visit kindergarten classes each school year to capture the incoming students.
- Phase II future - Do a larger scale roll out with special cards to retroactively capture older students in the district. (We hope to do this during or after the 2019-21 City Budget cycle.)

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
Through kindergarten class visits, city staff will be share with students how to use their card, activate it and make the most out of using library resources. Library brochures and information will be given out anytime a card is distributed. Also through efforts as part of the Student Success Initiative, Children’s Library staff members have forged greater partnerships and collaboration with the school Instructional Media Technicians and administrators and also have their support to ensure that students will make the most out of using their library card.

What quantitative metrics have you established for measuring the success of your program?
Metrics will include:
- Number of cards distributed – (will track # of Student Success Initiative cards given out and number of classes and students visited)
- Number of library cards activated after distribution (Library will be able to track patron type specific to Student Success Initiative cards)
- Increase in number of Student Success Initiative issued cards (track through patron type)

Out of the milestones you selected at the beginning of the grant year, how many have you reached? The milestones selected were:
- The library staff is aware of this project and we have formed a team to work on this project
- We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued etc.
- The library has created a timeline for this project and is flexible, knowing that dates might shift
- The library has identified one or more key persons with the Conejo Valley Unified School district.
- The library has held one or more meetings, and has communicated the goals of this project.

We have reached of these milestones but the target, timeline and key district persons have shifted. Library staff formed a team and has continued to work throughout the grant year on this project. Targets and timelines were proposed, established but then had to be adjusted according to city, library and district circumstances. Also key district personnel are changing positions, roles or responsibilities.
Please provide us with the following data:

- How many K-12 students are in your community/service area? 18,733
- How many active Juvenile cards does your library currently have? not available
- How many student cards have you distributed thus far (if applicable)? N/A

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?

The biggest surprise or challenge was the necessity of adjusting library team (specifically the Initiative Lead) expectations to accommodate, fit or be in line with bureaucratic and organizational realities. The library first implemented targets to do a widescale mailing and card distribution for all grades and schools for our school district partner. This target had to be adjusted to a more reasonable scope and also allow for timeline adjustments for policy change that could coincide with budget cycles and legal permissions that were beyond the control of the library team. We had to adjust our expectations and create a more manageable and workable immediate action plan to fit the need and requirements of our library and partner school district.

Do you have advice for libraries considering a Student Success Initiative?

The advice we have for the libraries considering a Student Success Initiative would be to be flexible, start small and celebrate small milestones and accomplishments. Through our experience we learned even though both the library and district were amenable to an Initiative, implementing such a change takes considerable time and coordination and many factors must be considered, that we hadn’t thought about. We wanted to go big, but realized that it was necessary to implement a smaller more targeted project to have success that could then be built upon. We also saw the benefit of celebrating smaller milestones. For example, a long-desired outcome that came to fruition during Initiative planning, was the library hosting a meeting with all of the school district Instructional Media Technicians, or school librarians. This had been discussed and talked about for a long time but because of Student Success Initiative planning it happened.
Student Success Initiative Case Study for Pilot Sites

**Library Name:** Yolo County Library

**Student Success Initiative Lead:** Scott Love, Library Regional Manager

**Type of library:** Library system or district

**ILS vendor and product:** Innovative - Sierra

**Type of school you are partnering with:** One school district

**Name of school or schools:** Esparto Unified School District, Delta Charter (possibly)

**Targeted student age:**
- Students 5-10 years old (K-5th grade)
- Students 11-13 years old (6th-8th grade)
- Students 14-18 years old (9th-12th grade)

**Level of student success initiative card:** Full access card

**Do you plan to modify your existing student or youth fine policy or any other policy/procedure because of the Student Success Initiative?**
Yes, we plan to eliminate overdue fees for students in September.

**What is your plan for identifying the student success library card in your ILS?**
Identifiable library barcode

**What is your estimated time frame for a roll out for this project?**
Already started, anticipate issuing student cards in September 2018

**Please provide an overview of your Student Success Initiative, and where you are in the process:**
We are targeting one school district at this time, so as to work through any technical issues that may arise. We have a signed MOA with the district and have met with their IT lead and should be able to easily get data. We are working with high school art students on them creating a design for the card, and we are working on developing a unique name for our student cards. We still have to figure out specifics on how the students will be set-up and later de-duped in our ILS. Around May, we will start work on taking a resolution to the County Board of Supervisors on eliminating overdue fines for everyone under age 18. We haven’t yet figured out specifics on how to deal with the 18-19-year-old students. As this is a big deal and system wide, we will create PR around this change.
What type of agreement (formal or informal, creating an MOU, etc.) are you making with the school for the Student Success Initiative? What is the status of this agreement or partnership with the school or school district regarding the Student Success Initiative?
We created a formal MOA based on one that Shasta had used. It has been signed by all parties.

How has your library considered handling student data in compliance with the Family Educational Rights and Privacy Act (FERPA)?
We’ve been working with the school district to ensure we meet any of their requirements and are only be getting as little information as possible. Staff handling the data will be restricted to two employees.

Do you have a plan on how you will distribute the library cards to the students?
It is still a little up in the air, but we anticipate having the cards a couple of weeks into the school year. We are going to try and hand them out personally, along with a brochure on what the card gives them access to. We will also work with meeting with school staff, students and parents to talk to them about what services the library offers.

Have you thought about or created any marketing or branding for your Student Success Initiative? If yes, please include these as part of your case study.
We are working with our first district to have the high school students create designs for us to choose from. We will be calling it the STAR Card

Do you have a plan for sustaining your Student Success Initiative? We haven’t put much effort in this area. We want to get through the first district, work out bugs and then start looking at additional schools or districts. We have one other district already asking if they can be next.

Have you thought about ways to ensure that students know how to use their card and make the most out of it?
Brochures, a video created by students, and by working with teachers, students and parents.

What quantitative metrics have you established for measuring the success of your program?
- Library currently has X-number of MOUs with school districts
- X-number of children ages 5-18 currently have library cards at partnering service areas/branch libraries
- Library currently issues X-number of new library cards to children 5-18 annually at partnering service areas/branch libraries
- Library currently circulates X-number of Juvenile and Young-Adult materials annually at partnering service areas/branch libraries
- X-number of children currently participate in library’s summer reading program annually
Out of the milestones you selected at the beginning of the grant year, how many have you reached?
- The library staff are aware of this project and a team has been formed to work on this project. [completed]
- We have established clear targets for our initiative, such as grade level for outreach, school or school district, target number of cards to be issued, etc. [completed]
- The library has created a timeline for this project, and is flexible, knowing that dates might shift. [completed]
- The library has identified what level of collaboration we will be able to do with the schools regarding issuing and sharing data (such as using the student ID numbers, how to issue the cards, etc.) [completed]
- The library has created a MOU with the districts. [completed]
- The library has identified one or more key person with each school district. [completed]
- The library has held one or more meetings, and has communicated the goals of this project. [completed]

Please provide us with the following data:
- How many K-12 students are in your community/service area? Estimated at 46,671
- How many active Juvenile cards does your library currently have? 13,265
- How many student cards have you distributed thus far (if applicable)? NA

What has been the biggest surprise and the biggest challenge regarding your Student Success Initiative?
So far, we have had great communication with the school district, and all has run smoothly.

Do you have advice for libraries considering a Student Success Initiative?
Don’t overextend yourself, start small and grow once you know how much work is involved.
7

Supporting Documents
In this section you will find documents created as part of this year’s Student Success Initiative. You may also consider reviewing the supplemental documents which were included in the first toolkit.

Table of Contents

<table>
<thead>
<tr>
<th>Document Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLP One-Page Description of Student Success Initiative</td>
<td>136</td>
</tr>
<tr>
<td>PLP letter to Department of Education</td>
<td>137</td>
</tr>
<tr>
<td>San Diego Public Library City/School Commitment Letter</td>
<td>139</td>
</tr>
<tr>
<td>Santa Cruz Public Library Talking Points for Meeting with School District Officials</td>
<td>140</td>
</tr>
<tr>
<td>Sample Letters Santa Cruz Public Library to Superintendent</td>
<td>141</td>
</tr>
<tr>
<td>Sample Letters Santa Cruz Public Library to Schools</td>
<td>142</td>
</tr>
<tr>
<td>Sample Letter Santa Cruz Public Library to Schools for TumbleBooks</td>
<td>143</td>
</tr>
<tr>
<td>Sample Letter Calexico Library to Teachers</td>
<td>144</td>
</tr>
<tr>
<td>Sample Letter San Mateo County Libraries to Students - New Library Card (bilingual)</td>
<td>145</td>
</tr>
<tr>
<td>Sample Letter San Mateo County Libraries to Students - Existing Library Card (bilingual)</td>
<td>147</td>
</tr>
<tr>
<td>Marketing – Alameda Free Library</td>
<td>149</td>
</tr>
<tr>
<td>Marketing Bookmark – Nevada County Community Library</td>
<td>151</td>
</tr>
<tr>
<td>Marketing Flier Introducing Student Success- Nevada County Community Library</td>
<td>152</td>
</tr>
<tr>
<td>Marketing Flier to Students- Nevada County Community Library</td>
<td>153</td>
</tr>
<tr>
<td>Marketing – Calexico Library “Student Success” Sample Library Card</td>
<td>154</td>
</tr>
<tr>
<td>Marketing – Folsom Library “My First Library Card”</td>
<td>155</td>
</tr>
<tr>
<td>Marketing Poster – Folsom Library</td>
<td>156</td>
</tr>
<tr>
<td>Marketing Flier – Huntington Beach</td>
<td>157</td>
</tr>
<tr>
<td>Marketing Bookmark – Huntington Beach</td>
<td>158</td>
</tr>
<tr>
<td>Marketing Invitations – Ontario Public Library KinderGo</td>
<td>159</td>
</tr>
<tr>
<td>Marketing Fliers – Redondo Beach Public Library</td>
<td>161</td>
</tr>
<tr>
<td>Marketing Bookmark – San Luis Obispo County Library</td>
<td>163</td>
</tr>
<tr>
<td>Marketing Flier – Sonoma County</td>
<td>165</td>
</tr>
<tr>
<td>Opt-Out Form – Calexico Library</td>
<td>167</td>
</tr>
<tr>
<td>Opt-Out Form – Nevada County Community Library</td>
<td>168</td>
</tr>
<tr>
<td>Opt-Out Form (Bilingual) – San Luis Obispo County Library</td>
<td>171</td>
</tr>
<tr>
<td>Memorandum of Understanding – Nevada County Community Library</td>
<td>173</td>
</tr>
<tr>
<td>Memorandum of Understanding – Palo Alto City Library</td>
<td>177</td>
</tr>
<tr>
<td>Memorandum of Understanding – Pleasanton Public Library</td>
<td>181</td>
</tr>
<tr>
<td>Memorandum of Understanding – Salinas Public Library</td>
<td>185</td>
</tr>
<tr>
<td>Memorandum of Understanding – Sonoma County Library</td>
<td>193</td>
</tr>
<tr>
<td>Policy for Student OneCard and Educator Accounts – Sonoma County</td>
<td>197</td>
</tr>
<tr>
<td>Strategic Plan for Student Success Initiative – Shasta County Libraries</td>
<td>199</td>
</tr>
<tr>
<td>Technical Details, Letter to Vendor with New Barcode Information, Napa County Library</td>
<td>211</td>
</tr>
<tr>
<td>Technical Details, Importing Student Records, Polaris</td>
<td>212</td>
</tr>
</tbody>
</table>
What is the Student Success Initiative?
The Student Success Initiative is a statewide LSTA grant-funded project led by the Pacific Library Partnership (PLP) that seeks to provide support and mentorship to California public libraries in creating partnerships with schools that result in library cards for students.

Why was it started?
According to the California Department of Education, there is 1 teacher librarian per 7,187 students, an average school library collection size is 13,000, and quite often, schools have few or no databases available. Public libraries have a variety of resources to help K-12 students succeed in school and beyond, including books, online databases, tutoring programs, and Internet access. In 2015, the Obama Administration and IMLS announced the ConnectED Library Challenge, which called upon cities, school districts, and public libraries to come together to ensure student success by providing all students with a free public library card.

What was done in the first year?
Building on the ConnectED Challenge, PLP was awarded an LSTA Pitch-an-Idea grant in 2016 for the Student Success Initiative. “Pilot” libraries seeking to establish these types of programs were paired with “mentor” libraries who had already had established relationships with schools for library cards. The 15 Northern California libraries supported one another in sharing models to establish student success initiatives and cultivate positive relationships with schools. It can take on average 18-24 months to establish an initiative.

PLP developed a Student Success Initiative Implementation Toolkit, complete with case studies from the first pilot libraries and supporting documents. The Initiative has garnered the support of the California Department of Education.

What is happening in the second year of Student Success Initiative?
The Student Success Initiative is now working with 45 libraries across the state to help establish initiatives. A new toolkit will be developed outlining on sustaining student success programs and relationships with stakeholders.

Educational Services Coordinators
Katie Leach, leach@plpinfo.org and
Emily Meehan, meehan@plpinfo.org
Carol Frost, PLP CEO, frost@plpinfo.org

www.plpinfo.org/student-success
STUDENT SUCCESS INITIATIVE

Every child in a California public school should have a public library card. Parents think so: 94% of them believe that libraries are important for their children.¹

To date, 54 public library jurisdictions (see reverse side) are working with the State Library to demonstrate how California schoolchildren can easily receive public library cards.² Our goal is to bring more teachers, administrators, and school superintendents into the coalition.

California public libraries support students and Common Core standards by:
• Offering access to databases and collections for research in multiple languages,
• Providing digital resources that foster collaboration and enquiry,
• Connecting kids to high speed broadband,
• Making safe and welcoming spaces available for homework help and summer reading and learning programs.

“This past month, our city mayor, Steve Miklos, mentioned our library/school partnership in his annual State of the City address — audible sounds of approval and excitement were heard in the audience when he announced all kindergartners were getting Folsom Public Library cards.”

“We just met with [the administration] from one of our local middle schools. They had heard about how we got our high schoolers student ID cards to work as library cards, and they were excited to do the same. We suggested that we use the same method of having parents opt out as part of their registration. After hearing us talk for about three minutes, the Vice Principal said that since all the elementary schools in the district share the same registration software, wouldn’t it be easier to just bring up all the elementary schools at the same time we imported the middle school data? Because of this, we may double the number of cards we issue next fall.” Los Gatos Library

“We are on the cusp of getting 8,000 cards to high school students.” San Mateo County Libraries

“We’ve activated 25,068 library cards, representing about 43% of SFUSD in the first 10 months. Scholar Card is making a difference in the lives of SF youth.” San Francisco Public Library

Together, we can help schools and libraries collaborate to provide all California’s school students with public library cards, model the type of partnership we want to inspire in local communities, and showcase California as a national education leader.

Please visit www.plpinfo.org/student-success. You may download the Student Success Initiative Implementation Resource Toolkit, which lists example MOUs and case studies. For further information, please contact Carol Frost, CEO, Pacific Library Partnership (frost@plpinfo.org) or Natalie Cole, Library Programs Consultant, California State Library (natalie.cole@library.ca.gov).

Libraries with Partnerships with Schools

<table>
<thead>
<tr>
<th>Library Name</th>
<th>Library Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda Free Library</td>
<td>Napa County Library</td>
</tr>
<tr>
<td>Altadena Library District</td>
<td>National City Public Library</td>
</tr>
<tr>
<td>Arcadia Public Library</td>
<td>Nevada County Community Libraries</td>
</tr>
<tr>
<td>Beaumont Library District</td>
<td>Ontario City Library</td>
</tr>
<tr>
<td>Benicia Public Library</td>
<td>Orange County Public Libraries</td>
</tr>
<tr>
<td>Burlingame Public Library</td>
<td>Palo Alto City Public Library</td>
</tr>
<tr>
<td>Calabasas Library</td>
<td>Redwood City Public Library</td>
</tr>
<tr>
<td>Camarena Memorial Library</td>
<td>Pleasanton Public Library</td>
</tr>
<tr>
<td>Chula Vista Public Library</td>
<td>Redondo Beach Public Library</td>
</tr>
<tr>
<td>Contra Costa County Library</td>
<td>Richmond Public Library</td>
</tr>
<tr>
<td>Daly City Public Library</td>
<td>Sacramento Public Library</td>
</tr>
<tr>
<td>Dixon Public Library</td>
<td>Salinas Public Library</td>
</tr>
<tr>
<td>Escondido Public Library</td>
<td>San Bruno Public Library</td>
</tr>
<tr>
<td>Folsom Public Library</td>
<td>San Diego Public Library</td>
</tr>
<tr>
<td>Huntington Beach Public Library</td>
<td>San Francisco Public Library</td>
</tr>
<tr>
<td>Lincoln Public Library</td>
<td>San Jose Public Library</td>
</tr>
<tr>
<td>Livermore Public Library</td>
<td>San Leandro Public Library</td>
</tr>
<tr>
<td>Los Angeles Public Library</td>
<td>San Luis Obispo County Public Libraries</td>
</tr>
<tr>
<td>Los Gatos Public Library</td>
<td>San Mateo City Public Library</td>
</tr>
<tr>
<td>Madera County Library</td>
<td>San Mateo County Libraries</td>
</tr>
<tr>
<td>Marin County Free Library</td>
<td>San Rafael City Library</td>
</tr>
<tr>
<td>Menlo Park Public Library</td>
<td>Santa Barbara Public Library</td>
</tr>
<tr>
<td>Monterey Public Library</td>
<td></td>
</tr>
<tr>
<td>Santa Cruz Public Libraries</td>
<td></td>
</tr>
<tr>
<td>Shasta Public Libraries</td>
<td></td>
</tr>
<tr>
<td>Solano County Library</td>
<td></td>
</tr>
<tr>
<td>Sonoma County Library</td>
<td></td>
</tr>
<tr>
<td>South San Francisco Public Library</td>
<td></td>
</tr>
<tr>
<td>Sutter County Library</td>
<td></td>
</tr>
<tr>
<td>Thousand Oaks Library</td>
<td></td>
</tr>
<tr>
<td>Woodland Public Library</td>
<td></td>
</tr>
<tr>
<td>Yolo County Library</td>
<td></td>
</tr>
</tbody>
</table>

The Student Success Initiative is a program of the Pacific Library Partnership, supported by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act, administered in California by the State Librarian.
January 30, 2017

Count us in! We are committed to working together as part of The Leaders Library Card Challenge to ensure that every K-12 student in the City of San Diego has a library card and knows how to use it to access the learning resources available at their public libraries.

We look forward to strengthening our partnership to widen access to essential learning resources, begin to close achievement gaps, and build a foundation for sustained collaboration to improve education outcomes for all students in our community.

Sincerely,

[Signature]

Mayor, City of San Diego

[Signature]

Superintendent, San Diego Unified School District

[Signature]

Library Director, City of San Diego
Santa Cruz Public Library

Talking Points for Meeting about Student Success Initiative with School District Officials

There's research that shows children who have and use library cards do better in school, so we've launched a campaign to put a new library card in the hand of every child at every school within our service area.

We're working on a statewide initiative to get all school children library cards.

In Santa Cruz County we've decided that our ultimate goal is for every first grader to have a library card.

Starting in fall 2019 we would like to include a library card opt-out form in the registration packets that are sent home at the beginning of the school year.

Currently we offer library cards when classes come to the library for a visit. We have them fill out the form beforehand and we give them the card on the day of the visit. That way kids are able to use all the resources in the library. When we do it that way we ask for a class list so we can verify the information on the applications.

We would like to develop an MOU with the school districts that would make it easier for us to issue library cards to every student.

Part of our progress toward this goal is we're working on removing fines on materials for children and teens. This will not only benefit kids but will also benefit teachers who work with children and use J and YA materials.

We will continue to offer class visits to all classes and to help them when they come to the library. One of the things we can do is show them age appropriate materials and find resources for projects and the Common Core Curriculum. This will help teachers and students with assignments.

The public library has made it a goal to have more nonfiction materials available that relate to school assignments. On the other hand you can help us by sharing school assignments so we know what we need to purchase for our collection.

We're more than happy to answer any questions and would be happy to come to your board meeting. We look forward to working with you to develop an MOU between the School District and the public library.

Other library systems in CA, including San Francisco, Oakland, San Jose, San Mateo, Napa, Shasta and LA, have already done this successfully. You may want to contact them to see how the program has benefited the schools.
**Santa Cruz Public Library**

**Talking Points for Meeting about Student Success Initiative with School District Officials**

There’s research that shows children who have and use library cards do better in school, so we’ve launched a campaign to put a new library card in the hand of every child at every school within our service area.

We’re working on a statewide initiative to get all school children library cards.

In Santa Cruz County we’ve decided that our ultimate goal is for every first grader to have a library card.

Starting in fall 2019 we would like to include a library card opt-out form in the registration packets that are sent home at the beginning of the school year.

Currently we offer library cards when classes come to the library for a visit. We have them fill out the form beforehand and we give them the card on the day of the visit. That way kids are able to use all the resources in the library. When we do it that way we ask for a class list so we can verify the information on the applications.

We would like to develop an MOU with the school districts that would make it easier for us to issue library cards to every student.

Part of our progress toward this goal is we’re working on removing fines on materials for children and teens. This will not only benefit kids but will also benefit teachers who work with children and use J and YA materials.

We will continue to offer class visits to all classes and to help them when they come to the library. One of the things we can do is show them age appropriate materials and find resources for projects and the Common Core Curriculum. This will help teachers and students with assignments.

The public library has made it a goal to have more nonfiction materials available that relate to school assignments. On the other hand you can help us by sharing school assignments so we know what we need to purchase for our collection.

We’re more than happy to answer any questions and would be happy to come to your board meeting. We look forward to working with you to develop an MOU between the School District and the public library.

Other library systems in CA, including San Francisco, Oakland, San Jose, San Mateo, Napa, Shasta and LA, have already done this successfully. You may want to contact them to see how the program has benefited the schools.
January 30, 2017

Count us in! We are committed to working together as part of The Leaders Library Card Challenge to ensure that every K-12 student in the City of San Diego has a library card and knows how to use it to access the learning resources available at their public libraries.

We look forward to strengthening our partnership to widen access to essential learning resources, begin to close achievement gaps, and build a foundation for sustained collaboration to improve education outcomes for all students in our community.

Sincerely,

[Signature]
Mayor, City of San Diego

[Signature]
Superintendent, San Diego Unified School District

[Signature]
Library Director, City of San Diego
Dear Superintendent,

I am sure that you appreciate the value of a library card for students, so we've launched a campaign to put a new library card in the hand of every child at every school within our service area.

We are working on a California statewide initiative to get all school children library cards. Santa Cruz Public Libraries have decided that our ultimate goal is for every first grader in our service area to have a library card by 2020. Starting in Fall 2019 we would like to include a library card opt-out form in the registration packets that are sent home at the beginning of the first grade school year.

Currently we offer library cards when classes come to the library for a visit. We have them or their parents fill out the form beforehand and we give them the card on the day of the visit. That way kids are able to use all the resources in the library. The forms are sometimes difficult to read, so we ask for a class list to verify the information on the applications. We would like to develop an MOU to share information with the school districts that would make it easier for us to issue library cards to every student.

Part of our progress toward this goal is working on removing fines on materials for children and teens. This will not only benefit kids but will also benefit teachers who work with children and use J and YA materials.

The public library has also made it a goal to have more nonfiction materials available that relate to school assignments and support the Common Core Curriculum. We welcome feedback that helps us select books for our collection.

Other library systems in CA, including San Francisco, Oakland, San Jose, San Mateo, Napa, Shasta and LA, have already done this successfully. You may want to contact them to see how the program has benefited the schools.

We're more than happy to answer any questions and to come to your board meeting to talk further. We look forward to working with you to develop an MOU between the School District and the Public Library.

Yours sincerely,

[Librarian]

Librarian, K-12 Initiative,
Santa Cruz Public Libraries
(831) 427-7700, ext. 7728
Dear __________,

My name is __________ and I’m a Youth Services librarian with the Santa Cruz Public Libraries. Research shows that children who have library cards do better in school. This year, we've launched a campaign to put a new library card in the hands of every child at every school within our service area.

We have joined a California statewide initiative, the Student Success Initiative, to strengthen the relationship between schools and public libraries. Santa Cruz Public Libraries have decided that our first goal is for every first grader in our service area to have a library card by 2020. The children would be automatically signed up for a card at the beginning of the school year, starting in the fall of 2019. We would also include a library card opt-out form in the registration packets that are sent home at the beginning of the first grade school year.

Currently we offer library cards when classes come to the library for a visit. We have them or their parents fill out the form beforehand and we give them the card on the day of the visit. This insures that kids are able to use all the resources in the library. However, the forms are sometimes difficult for us to read, so we ask for a class list to verify the information on the applications. We would like to develop an MOU to share information with the school districts that would make it easier for us to issue library cards to every student.

Part of our progress toward this goal is working on removing fines on materials for children and teens. This will not only benefit kids but will also benefit teachers who work with children and use J and YA materials.

Other library systems in California, including San Francisco, Oakland, San Jose, San Mateo, Napa, Shasta and LA, have already done this successfully. You may want to contact them to see how the program has benefited the schools.

We’re more than happy to answer any questions and we hope to meet with you to talk further. We look forward to working with you to develop an MOU between the School District and the Public Library.

Yours sincerely,

[Librarian Name]
Librarian
K-12 Initiative

Santa Cruz Public Libraries
[phone]
[email]
13 July 13, 2017

Santa Cruz Gardens Elementary School
Attn: [Principal Name], Principal
8005 Winkle Ave.
Santa Cruz, CA 95065

Dear Principal [Last name],

Santa Cruz Public Libraries is proud to announce a new partnership with TumbleBook Library that provides access to local schools. TumbleBook Library is an online collection of animated, professionally narrated story books. Also included are graphic novels, nonfiction, videos, math stories, language learning, and puzzles and games. The story books come in a wide range of subjects, styles, and reading levels. TumbleBooks licenses best-sellers and award winners from the world's top publishers like HarperCollins, Candlewick Press, and Simon & Schuster. Santa Cruz Public Libraries has offered TumbleBooks to library card holders for many years, and it has become a favorite resource for many parents and children. We are now thrilled to provide access at local schools!

Attached please find a User Guide for the TumbleBook Library. It offers ideas on how to use TumbleBooks in the classroom or library. Students may also access TumbleBooks from home without a library card by clicking your district’s unique URL. The link can be put on your school’s website and/or bookmarked on school computers.

**Soquel Union Elementary School District:**
[unique link for Tumblebooks access for this district]

Please let us know how we can support you in your use of the TumbleBook Library. We’d love to hear from you! Send us an email at elibrary@santacruzpl.org, or give us a call at 831-427-7713.

Sign up for our Teacher newsletter to stay up-to-date on resources and services that can support your work in the classroom: [http://eepurl.com/b-fBTH](http://eepurl.com/b-fBTH)

Sincerely,

[Librarian Name]
Dear CHS Teacher:

The Camarena Memorial Library is launching the “Student Success Card” program to get a public library card in the hands of every single CHS student. We need your help! Attached are 30 copies of the “Opt Out” letter to parents. The program will be implemented in the next few weeks. Please distribute the letters to your English class students. We ask that you collect any that are returned by May 11th (we are hoping not get many back!). Library cards will be delivered to your classroom the week of May 14th.

Just as a re-cap...

The STUDENT SUCCESS CARD will allow the students to:

- Use subscription online databases online
- Download e-books
- Check out e-magazines
- Get Homework Help from online tutors, including evenings and weekends.
- Use online encyclopedias: World Book and Britannica
- Check out up to 5 library books.

Parents do not need to do anything for their child to receive a “Student Success Card.” Those not wanting their child to get one may submit the signed “Opt Out” form.

Please attach this completed sheet to any forms that you may collect. We will pick them up on Monday, May 14th. Thank you in advance for your help in getting our students this very useful tool that will contribute to their student success!

______________________________  ____________________________
Teacher’s Name (please print)    Class room #

______________________________  ____________________________
Class Name                      Date
Dear Student:

Congratulations – you already have a library card from the Peninsula Library System! If you have misplaced it, you can go to your local library to receive a free replacement.

Our library card enables you to borrow books, DVDs, CDs, e-readers, laptops and wireless hotspots, access most of our online resources from the website as well as access our high-speed computers and Wi-Fi. Our extensive online resources include materials for students to use for school assignments, skills development and college preparation. In addition, you have access to our collection of eBooks, eAudiobooks, eMagazines and eMusic that can be loaded onto mobile devices.

Your library cards gives you free and open access to all these enriching and empowering resources!

Let us know if you have questions about your library card – please contact us at your local library.

Sincerely,

San Mateo County Libraries
smcl.org
Querido estudiante:

¡Felicidades! Ahora ya tienes una tarjeta de la biblioteca en el sistema de bibliotecas de la Península! Si se te ha perdido, puedes ir a tu biblioteca local para recibir un remplazo gratuito.

Nuestra tarjeta te permite tomar prestados libros, DVDs, CDs, libros electrónicos, laptops, y WiFi Hotspots; acceso a muchos de los recursos que tenemos en línea al igual que computadoras y conexión a internet de alta velocidad. La amplia lista de recursos en línea incluye materiales para estudiantes que se pueden utilizar para tareas escolares, desarrollo de habilidades y preparación para el colegio. Además, tienes acceso a nuestra colección de Libros Electrónicos, Audiolibros Electrónicos, Revistas Electrónicas y Música Electrónica que se puede descargar en dispositivos móviles.

¡Tu tarjeta de la biblioteca te da acceso pleno y gratuito a estos enriquecedores y motivadores recursos!

Avisanos si tienes preguntas sobre tu tarjeta de la biblioteca- favor de contactarnos en tu biblioteca local.

Atentamente,

Bibliotecas del Condado de San Mateo
Smcl.org
Dear Student:

This year, public libraries on the Peninsula are reaching out to students to promote the benefits of having a library card.

The library card enables you to borrow books, DVDs, CDs, eReaders, laptops and wireless hotspots; and access to most online resources from the website as well as access high-speed computers and WiFi. The extensive online resources include materials for students to use for school assignments, skill development and college preparation. In addition, various libraries loan a sizeable collection of eBooks, eAudiobooks, eMagazines and eMusic that can be loaded onto mobile devices. Yes, your library card gives you free and open access to all these enriching and empowering resources!

Another great benefit to students under the age of 18 years is that you do not have to pay overdue fines. You are only responsible for lost or damaged library materials.

Let us know if you have questions about your library card – please contact us at your local library.

Sincerely,

San Mateo County Libraries
smcl.org
Querido Estudiante:

Este año, las bibliotecas de la Península se están conectando con estudiantes para promover los beneficios de tener una tarjeta de la biblioteca. Felicidades si ya obtuviste una tarjeta de la biblioteca en tu biblioteca local. Si has perdido tu tarjeta, puedes obtener una de reemplazo completamente gratis en tu biblioteca más cercana.

La tarjeta de la biblioteca te permite tomar prestados libros, DVDs, CDs, libros electrónicos, laptops, y WiFi Hotspots; además tienes acceso a muchos de los recursos que tenemos en línea al igual que computadoras y conexión a internet de alta velocidad. La amplia lista de recursos en línea incluye materiales para estudiantes que pueden ser utilizados para tareas escolares, desarrollo de habilidades y preparación para el colegio. Además, varias bibliotecas prestan una gran colección de Libros Electrónicos, Audiolibros Electrónicos, Revistas Electrónicas y Música Electrónica que se puede descargar en dispositivos móviles. ¡Si, tu tarjeta de la biblioteca te da pleno y gratuito acceso a estos enriquecedores y motivadores recursos!

Otro gran beneficio para los estudiantes menores de 18 años, es el no tener que pagar multas por demoras de materiales. Tú sólo eres responsable por los materiales perdidos o dañados.

Avisanos si tienes preguntas sobre tu tarjeta de la biblioteca- favor de contactarnos en tu biblioteca local.

Atentamente,

Bibliotecas del Condado de San Mateo
Smcl.org
The Connect Code

Learn without limits

23341 + Your Student ID number = Your code for digital library access

With the Connect Code you can access:
databases, e-books, e-audiobooks, e-magazines,
library chat help & Tutor.com

Find out more about resources at alamedafree.org
Questions? Email connectcode@alamedaca.gov
or call the Reference Desk at (510)747-7713.
Alameda Free Library, 1550 Oak St.
Using Your Code

A brief Q&A to help you use your Connect Code

What is my Connect Code/digital library card number and pin number?
The Connect Code/digital library card number is 23341 followed by your student ID number and your pin number has been set to 1234. For example, if your student ID number is jandoe123, then your Connect Code is 23341jandoe123.

How do I use the code?
Go to alamedaca.gov/library/databases and pick a database. When asked to login, use the “Connect Code” as your library barcode and the pin number 1234.

What should I use it for?
Use your Connect Code to do research, download free e-books, audiobooks, & e-magazines, use the computer in the library, and get research assistance. Contact the Reference Desk for help searching databases.

How can I change my pin number?
Go to http://alameda.polarislibrary.com/polaris/ and follow these steps: My Account > Log In > enter Library Card Number & Pin. Once logged in: My Account > My Record > Change Logon. If you change your Pin & then forget it, contact the Reference Desk and we will reset it to 1234.

I already have a library card. How is the Connect Code different?
The Connect Code is not a physical card and can only be used to access online resources (databases, Overdrive, Flipster, etc.) and for computer use at the library. You cannot check out physical items with the Connect Code. Please keep & continue to use your library card to check out books; you can use either/both your Connect Code & your library card to access digital resources.

I have a question that’s not on here. Who can I contact about my Connect Code?
For further questions, email us at connectcode@alamedaca.gov or call the Reference Desk at (510)747-7713 or use the "Ask A Librarian" chat box at alamedafree.org.
Congratulations, you have a Student Success Card!

You can now check out up to three items at any Nevada County Community Library branch without fines or fees (though of course we want them back).

You don’t need to come in to get a card and you can keep your regular card. Your new library card numbers are your school initials (ie BRHS) plus your school ID number, ie BRHS11111.

Visit our catalog to start putting things on hold! Your pin will be “userpass” until you log in and change it at library.mynevadacounty.com.

You can also access our free online resources including e-books, e-audiobooks, and databases with your new cards.

What can you get with your Student Success Card, all totally free?!

Books, of course! Check out library.mynevadacounty.com

E-books and e-audiobooks at northnet.overdrive.com

College prep and test help, and databases to help with homework and research, at mynevadacounty.com/2040/Teen-Resources

Streaming videos, music, audiobooks, and comics available instantly at hoopladigital.com

Download current magazines to your phone, tablet, or computer at rbdigital.com/northnetca/service/magazines

Check out a laptop or log on to our public computers to print. Or, check out a 3D printer!

We have programs for teens year round, no library card necessary!
Introducing the Student Success Library Card

Students at Bear River High School and Nevada Union High School can now check out up to three items at any Nevada County Community Library branch without fines or fees.

You don’t need to come in to get a new card or throw away one you already have (you can keep both!). Your new library card numbers are your school initials (ie BRHS or NUHS) plus your school ID number, ie BRHS11111. Your pin will be “userpass” until you log in and change it at library.mynevadacounty.com

You can also access our free online resources including e-books, e-audiobooks, and databases with your new cards: https://www.mynevadacounty.com/2040/Teen-Resources

If you have any questions, contact Youth Librarian Lisa Nowlain at lisa.nowlain@co.nevada.ca.us or 530-265-1541.
Congratulations, you have a Student Success Library Card

You can now check out up to three items at any Nevada County Community Library branch **without fines or fees** (though of course we want them back).

You don’t need to come in to get a new card or throw away one you already have (you can keep both!). Your new library card numbers are your school initials (ie BRHS or NUHS) plus your school ID number, ie BRHS11111.

You can also access our free online resources including e-books, e-audiobooks, and databases with your new cards: [https://www.mynevadacounty.com/2040/Teen-Resources](https://www.mynevadacounty.com/2040/Teen-Resources)

Visit our catalog to start putting things on hold! Your pin will be “userpass” until you log in and change it at library.mynevadacounty.com

If you have any questions, contact Youth Librarian Lisa Nowlain at lisa.nowlain@co.nevada.ca.us or 530-265-1541.
My First Library Card

Check your kindergartener's backpack for a new Folsom Public Library card designed by author David A. Carter. Bring the card, along with parent or guardian's photo ID and proof of current address, to the library (411 Stafford St., Folsom, CA) to activate it AND get a free book to keep!

This is not a Folsom Cordova Unified School District Sponsored program. Any opinions expressed are not necessarily those of the District or school personnel. The District accepts no liability or responsibility for the program/activity.
NEW HBPL LIBRARY CARD FOR TEENS

What does a Teen Card do for you?

- A teen card provides access to all of HBPL’s digital content including: ebooks, eaudio, research databases, streaming music, magazine and film databases.
- A teen card allows you to check out up to 5 books at a time.
- A teen card accrues no fines or fees for overdue items.
- Teens ages 13-17 can use their school ID or CA Driver’s License to create an account.
- Cards will be available to ALL teens enrolled in the Huntington Beach Unified School District!
HBPL TEEN CARD

• Free!
• Access to all digital resources including research databases, streaming music, ebooks & more.
• Limited to 5 book check outs at a time.
• No fines for overdue items.
• Use your school ID or CA drivers license to create your account.

HBPL TEEN CARD

• Free!
• Access to all digital resources including research databases, streaming music, ebooks & more.
• Limited to 5 book check outs at a time.
• No fines for overdue items.
• Use your school ID or CA drivers license to create your account.
You’re invited!

Celebrate KINDERGO 2016

Monday, October 17, 2016
11AM - 12PM
Ovitt Family Community Library Meeting Room

Light refreshments served
You're invited to celebrate Kinder Go!

Tuesday, October 17, 2017 • 1 – 2 PM

Ovitt Family Community Library
215 E. C Street

Light refreshments served
KEEP
CALM
AND
CARRY
ONE

Are you a student at a school located in Redondo Beach? If so, you can apply online for a free library card through the library’s webpage under “Borrowing and Renewing Materials.” The card will be mailed to you in 2 weeks and allows for full use of the Library’s electronic resources. To check out physical or digital materials, you can visit either the Main Library or North Branch to upgrade the card.

Electronic resources include:

- Newspaper and periodical databases—research aides
- Gale courses—free online classes including test prep
- Rosetta Stone and Pronunciator—foreign language practice
- Tutor.com—1:1 homework help, AP and SAT/ACT test prep, college essay review, and college entrance/scholarship assistance

FREE!

For more information contact the Library at (310) 318-0675 or visit www.redondo.org/library
GET CARDED
@ YOUR
Redondo
Beach
Public Library

Are you a student at a school located in Redondo Beach? If so, you can apply online for a free library card through the library’s webpage under “Borrowing & Renewing Materials.” The card will be mailed to you in 2 weeks and allows for full use of the Library’s electronic resources. To check out physical or digital materials, you can visit either the Main Library or North Branch (w/guardian) to upgrade the card.

Electronic resources include:

- Newspaper and periodical databases—research aides
- Gale courses—free online classes including test prep
- Rosetta Stone and Pronunciator—foreign language practice
- Tutor.com—1:1 homework help, AP and SAT/ACT test prep, college essay review, and college entrance/scholarship assistance

FREE!

For more information contact the Library at (310) 318-0675 or visit www.redondo.org/library
Need homework help? Shandon Library has you covered.

Use your new library card today for access to free online tutoring and more.

slolibrary.org

Your temporary pin is 1234. Log in at slolibrary.org and click 'My Account' to change it!
SHANDON LIBRARY
195 N. 2ND ST.
SHANDON, CA
805-237-3009

HOURS
MON  10 – 6
WED  2 – 6
SAT  10 – 3

WIFI & COMPUTERS
FICTION, NONFICTION
LARGE PRINT
CHILDREN'S, TEEN BOOKS
DVDS, CDS, AUDIOBOOKS
MAGAZINES

VISIT US ONLINE AT
SLOLIBRARY.ORG
FOR ACCESS TO:

LIVE TUTORING
Live online help from expert tutors

STUDY TOOLS

DOWNLOADABLE BOOKS,
MOVIES, AND MUSIC
A NEW and EXCITING opportunity for SRCS Students

With a Sonoma County Library STUDENT ONE CARD, SRCS students can ...

• Access electronic resources 24/7 via the SCL website.
• Receive FREE online one-on-one homework tutoring in English and Spanish in all major subjects.
• Use public library computers at any of the 14 public library locations.
• Borrow up to 10 items from any Sonoma County Library location with no fines.

... and it’s all FREE!

Your student will automatically be enrolled in the STUDENT ONE CARD program in March 2018.

Parents are responsible for their children’s use of library resources.

More information, including opt-out forms, is available at http://sonomalibrary.org/studentonecard.
Con **STUDENT ONE CARD** de la Biblioteca del Condado de Sonoma, los estudiantes de SRCS pueden...

- Tener acceso a los recursos electrónicos de la SCL 24/7 a través del sitio web.
- Recibir tutoría GRATUITA uno a uno en inglés y español para las materias principales.
- Usar las computadoras públicas en las 14 ubicaciones de la Biblioteca.
- Sacar en préstamo hasta 10 artículos sin multas de las Bibliotecas del Condado.

... ¡y todo es GRATIS!

El estudiante será inscrito automáticamente en el programa **STUDENT ONE CARD** en marzo de 2018.

**Los padres son responsables del uso de los recursos de la Biblioteca por su hijo.**

Hay más información, incluyendo la forma para optar por no participar, está disponible en [http://sonomalibrary.org/studentonecard](http://sonomalibrary.org/studentonecard).
Dear Parent and/or Guardian:

Calexico High School students will be provided with library cards allowing them access to educational resources and privileges at the Camarena Memorial Library. Students and parents are responsible for all materials charged on his/her library card, to report a lost library card, to observe library rules and policies, to promptly pay all charges, and to notify the Library of an address, telephone or name change. A library card is not transferable. Students give permission to their parent/guardian to access their library account. Parents/Guardians may opt out of these library privileges.

The STUDENT SUCCESS CARD will allow the students to:

- Use subscription online databases online
- Download e-books
- Check out e-magazines
- Get Homework Help from online tutors, including evenings and weekends.
- Use online encyclopedias: World Book and Britannica
- Check out up to 5 library books.

☐ Check here if you **DO NOT** want your student to have a Camarena Memorial Library Student Success card.

If you **DO** want your student to receive a Camarena Memorial Library Student Success card, **this form does not have to be returned**.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Student I.D. number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parent Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

169
NJUHSD Student Success Card Program

The Nevada Joint Union High School District (NJUHSD) and Nevada County Community Library (NCCL) are offering an exciting new opportunity for high school students with the NJUHSD Student Success Program, an innovative way for students 9-12 to access public library resources. Student Success Cards allows NJUHSD student ID’s to serve as a Nevada County Community Library card. The Student Success program is modeled after those being introduced in many communities across the country. The Nevada County program follows the lead of the Napa Valley Unified School District program, one of the first in California.

Your student will automatically be enrolled in the Student Success Program with the Nevada County Community Library.

The Student Success Program allows NJUHSD students to…

- **Full access** to free digital resources! These include e-books, e-audiobooks, databases, music, and more. For information about NCCL’s digital resources, visit mynevadacounty.com/295/Digital-Resources
- **Borrow up to 3 items** from any NCCL library locations. To view NCCL’s online catalog, visit library.mynevadacounty.com/MVC
- **Use public library computers** at any of the NCCL library locations.
- **No fines or fees.**

**Frequently Asked Questions**

What student information will NJUHSD share with the county library? 1. Student’s name, 2. School, 3. Grade, 4. Student ID number, 5. Home address and phone number, 6. Student date of birth, and 7. Parent and/or guardian name. NCCL has signed a data privacy agreement ensuring student information will not be shared with other entities, is stored securely, and that all information will be used for the sole purpose of facilitating library services to students.

What if I don’t want my student to participate in the Student Success Card Program? Families may opt-out of the Student Success Program. The second page of this form provides details for the opt-out process.

What if I want my student to have full access to NCCL services and materials? You may expand your student’s access to materials (greater than 3 items) by signing up to an additional library card by visiting a branch of the Nevada County Community Library.

What if I don’t want my student to check out materials? Visit a branch of the NCCL to have your student’s card changed to online resources only.
What if my student already has a NCCL library card? If your student already has a card with NCCL, their student ID number will be set up for electronic access to online resources. This will enable your student to use NCCL resources from home and school via the internet. Your child can continue to use their NCCL card to check out materials and for additional online access. If you would like to “merge” the two cards, visit a branch of the NCCL. This would replace your student’s existing library card number with his/her student ID number.

NJUHSD Student Success Card Program
OPT-OUT FORM

Unless notified before August 16th, your child will automatically be enrolled in the free Student Success Card Program with the Nevada County Community Library.

If you opt-out after August 16th, you will need to contact the Nevada County Community Library so they can deactivate your student’s card. Contact Rachel Schneider, Youth Librarian at Grass Valley Library, at rachel.schneider@co.nevada.ca.us or 530-470-2695.

The Student Success Program allows NJUHSD students to...

- Borrow up to 3 items from any Nevada County Community Library location without fines or fees.
- Use and download music, eBooks, magazines, academic databases, and other electronic resources 24/7 via the Nevada County Community Library website.

Parents are responsible for their children’s use of library resources.

Deactivating, changing, or opting out of your child’s Student Success Card has no effect on any other account you or your child may have with the Nevada County Community Library.

I do not want my child to have access to the free Student Success Card through the Nevada County Community Library (NCCL) card. I understand that if this form is submitted after August 16, I must contact NCCL to have my child’s Student Success Card deactivated.

Student’s Name (please print): __________________________ D.O.B. ___/___/___

Parent/Guardian’s Name (please print): __________________________
Parent/Guardian Signature: __________________________________________ Date: ______

* Please submit this form to the principal's secretary to complete the opt out process.

For staff use: Date received __________  Noted in student database (initial) ______

*FILE WITH ONSITE STUDENT RECORDS*
Library Cards for all Students!
Your child will receive a free library card from the County of San Luis Obispo Public Library. Return this form to the teacher by _________.

☐ Yes, I DO want my student to receive a County of San Luis Obispo Public Libraries card.

☐ NO, I DO NOT want my student to receive a County of San Luis Obispo Public Libraries card.

________________________________________________________________________________________________________
Print Student Name

________________________________________________________________________________________________________
Print Parent/Guardian Name                                         Phone Number

________________________________________________________________________________________________________
Signature of Parent/Guardian

The Shandon Joint Unified School District and the County of San Luis Obispo Public Library are partnering to improve access to educational and recreational materials by providing every student with a free County of San Luis Obispo Public Library card by sharing student data including name, address, phone number, and birthdate. This information will only be used for library purposes.

Education Research indicates:
• Children who have library cards and use the library perform better in school.
• Public library staff help students learn how to perform age-appropriate Internet searches, online tutoring and utilize Web-based Resources for homework help using free, public-access computers;
• A library card is the most important school supply of all.

The County of San Luis Obispo Public Library charges overdue fines (.25/day) for any children’s materials returned late and you do remain responsible for the return of the items to the library after three weeks.

Updated 5/4/18
¡Tarjetas de la Biblioteca para todos!

Su hijo recibirá gratis una tarjeta de la Biblioteca del Condado de San Luis Obispo. Favor de regresar esta forma a más tardar el ____ de 2018.

☐ Sí, yo lo quiero recibir una tarjeta de la biblioteca del condado de San Luis Obispo para mi hijo/a.

☐ NO, no lo quiero recibir una tarjeta de la biblioteca del condado de San Luis Obispo para mi hijo/a.

________________________________________________________________________________________________________________________________________

Nombre de Estudiante

________________________________________________________________________________________________________________________________________

Nombre del Padre/Madre Teléfono

________________________________________________________________________________________________________________________________________

Firma del Padre/Madre

El Distrito Escolar de Shandon y la Biblioteca del Condado de San Luis Obispo están trabajando conjuntamente para proveer una tarjeta de la Biblioteca a todos los estudiantes y así mejorar el acceso a materiales educativos y recreacionales.

La inquesta educativa nos muestra que:

- Los niños que poseen una tarjeta de la Biblioteca tienen mejor desempeño escolar.
- Los estudiantes pueden obtener ayuda de la Biblioteca para encontrar materiales apropiados según su edad y recibir ayuda en las tareas escolares a través de internet.
- La tarjeta de la Biblioteca es la mejor herramienta escolar.

La Biblioteca del Condado de San Luis Obispo cobra multas (.25/día) por libros o materiales que no son regresados en la fecha indicada. Usted es responsable de que los libros o materiales sean regresados en la fecha indicada.
Memorandum of Understanding

Between

Nevada County Community Library

And

Nevada Joint Union High School District

April 25, 2018

This Memorandum of Understanding (MOU) between Nevada County (COUNTY) through the Nevada County Community Library (NCCL) and Nevada Joint Union High School District (NJUHSD) stipulates that the parties agree to the following regarding the use of student identification cards as public library cards for the purpose of assisting District secondary students with access to NCCL resources.

Participating students will receive a special Student Library Card account, which gives them access to databases and online resources, but is not related to the provision of internet access by NCCL. Student account holders will be able to check out three books (no media) at a time from NCCL branches. Student library accounts will not accrue fines or fees of any kind, including late fees, replacement charges for lost books, or related lost item processing fees. If students wish to borrow more than three books at a time, or to borrow DVDs or other media, they are encouraged to apply for a regular youth library card directly with NCCL. Students will be allowed to have a Student account and a regular youth card simultaneously. Student library accounts will expire when the student turns eighteen or leave the district.

This program will provide opportunities for NCCL staff to support secondary students in their efforts toward graduation by assisting them with increased literacy skills, access to multi-learning resources in all academic subject areas, online homework assistance in both English and Spanish, resources for preparation for college attendance, use of software and hardware to create digital media content, and the like.

NCCL policies require patrons below the age of 18 to acquire a parental signature in order to apply for a library card. This MOU will allow District secondary students to automatically receive access to NCCL resources regardless of age and without the signature of a parent or guardian by using their student identification card number. NJUHSD students’ parents or guardians will be agreeing to allow the students to use their student identification cards at the time of registration. NJUHSD will develop and implement an annual parent opt-out process for those parents who do not wish their student to participate.

The NJUHSD Student Information System’s team will provide NCCL with the necessary student data on an agreed upon time line. Both NJUHSD and NCCL acknowledge that certain material or information regarding students may consist of confidential records subject to the Federal
Family Educational Rights and Privacy Act or other privacy laws. The NCCL agrees to hold all information in confidence and only use the information in performance of the MOU.

In partnership with NCCL, NJUHSD will identify pre-program and post-program measures to determine progress towards achieving the District goals.

To the full extent permitted by law, NJUHSD and COUNTY shall each defend, indemnify and hold harmless each other as well as their respective officers, agents, employees, volunteers or representatives from and against any and all liability, claims, actions, proceedings, losses, injuries, damages or expenses of every name, kind and description, including litigation costs and reasonable attorney's fees incurred in connection therewith, brought for or on account of personal injury (including death) or damage to property, arising out of or connected with any acts or omissions of that party or its officers, agents, employees, volunteers, or contractors or their subcontractors, when performing any activities or obligations required of that party under this Agreement. Each party shall notify the other party immediately in writing of any claim or damage related to activities performed under this Agreement. The parties shall cooperate with each other in the investigation and disposition of any claim arising out of the activities under this Agreement, providing that nothing shall require either party to disclose any documents, records or communications that are protected under peer review privilege, attorney-client privilege, or attorney work product privilege.

Further, both NJUHSD and NCCL accept responsibility for determining and approving the character and fitness of their respective employees (including volunteers, agents or representatives) to provide the services required of NJUHSD under this Agreement, including completion of a satisfactory criminal/background check and period rechecks to the extent permitted by law. Notwithstanding anything to the contrary in this Paragraph, each party shall hold the other and its officers, agents and employees harmless from any liability for injuries or damages resulting from a breach of this provision or the indemnifying party’s actions in this regard.

**DATA SHARING**

a. NJUHSD will work in good faith with NCCL to ensure NCCL will have access to necessary pupil records for the purposes of issuing all NJUHSD school students, grades 9-12, digital library accounts. The following data fields shall be shared:
   i. Student ID# (numeric)
   ii. Name (last name, first name, middle)
   iii. Date of Birth
   iv. Projected graduation date (projection based on student’s age)
   v. Address
   vi. Email

b. NJUHSD will allow parents and guardians to opt-out by sending a letter to NJUHSD before the beginning of the school year. Parents and guardians will have a period of one month to mail in the opt-out form.
c. NJUHSD will transfer data to NCCL in a zipped and password protected file format via secure file transfer protocol (FTP).

d. NJUHSD shall transfer the data to NCCL as follows:
   i. On or before 8/30/2018: initial data transfer. In the event this MOU is executed after that date, NJUHSD shall perform the initial data transfer as soon as reasonably practicable.
   ii. Thereafter, throughout the remainder of the term, data updates will be provided to the Libraries in August and February of each year.

Notwithstanding the foregoing, the parties may mutually agree to utilize a different schedule if it is determined appropriate at any time throughout the term of this MOU. Such agreement will not require a written modification, unless specifically requested by one of the parties. The parties agree to meet in February 2018 to discuss the data-sharing process and determine if there are any changes that need to be made.

e. NCCL agrees that any confidential pupil records and/or any personally identifiable information related to students contained therein (limited to the data fields listed in section a), will only be used for the specific purposes identified in this MOU. This obligation will survive the termination of this MOU.

f. NCCL shall comply with the provisions of the Family Education Rights and Privacy Act (FERPA), and will not permit any other party to have access to the information contained in the confidential pupil records. NCCL shall provide training for its staff in the proper administration of federal and state pupil records confidentiality laws and procedures. In the event any third party seeks access to any pupil records the third party shall be directed to the NJUHSD for processing of the request. Without the written consent of the parent/guardian or adult pupil to which the record pertains, except that each student’s name and Student I.D. number will be utilized to create the digital library account, which information may be accessed by any NCCL member library. This obligation will survive the termination of this MOU.

g. **Indemnification.** To the fullest extent permitted by law, each party agrees to hold harmless, defend, and indemnify the other and its respective officers, officials, and employees from and against all claims, damages, losses, and expenses, including reasonable attorney fees and costs arising out of the performance of the MOU described herein, caused in whole or in part by any negligent act or omission of the indemnifying party, its officers, officials, and employees, except where caused by the willful misconduct of the indemnified party, its officers, officials, and employees.

h. **Duration; Termination.** This MOU will be effective from the date of full execution and will remain in effect until either party gives thirty (30) days written notice to the other of their intention to terminate this MOU.
We, the undersigned, on behalf of Nevada County through the Nevada County Community Library and the Nevada Joint Union High School District.

County of Nevada

Yolande Wilburn
County Librarian

Date: ________________

Nevada Joint Union High School District

Dan Frisella
Assistant Superintendent

Date: ________________
MEMORANDUM OF UNDERSTANDING BETWEEN THE PALO ALTO UNIFIED SCHOOL DISTRICT AND THE PALO ALTO CITY LIBRARY

This Memorandum of Understanding ("Agreement") is made and entered into this day Dec. 20, 2017 ("Effective Date") by and between The Palo Alto Unified School District (herein "PAUSD" or "the District") located at 25 Churchill Ave, Palo Alto, CA 94306 and the City of Palo Alto and its Palo Alto City Library (the "Library"). The Library and PAUSD are sometimes referred to in this Agreement individually as a "Party" and collectively as the “Parties.”

BACKGROUND

PAUSD staff and Library staff have built strong one-on-one relationships to improve services to our shared constituency. Moreover, PAUSD and the Library have a long history of working together as educational partners, with the Library serving as an extension of the classroom—providing students with access to books, computers, reading programs, technology support and dozens of other important educational resources during out-of-school time. The goal of both organizations is to increase literacy and educational success through a comprehensive, strategic and sustainable collaboration. In order to achieve this, the Library and the District seek to build a strong relationship at the administrative level in order to work together more collaboratively and demonstrate measurable impact.

In pursuit of that goal, PAUSD and the Library would like to develop an infrastructure that will allow PAUSD students to easily access and use the Palo Alto City Library's electronic and print resources freely through the use of a joint Student ID/Library Card known as the Palo Alto Student Asset Card. The Palo Alto Student Asset Card will focus on supporting Palo Alto students through college and launching them into a successful career and life with a library card that will always travel with them and provide benefits of life-long learning.

Such services shall be provided at no cost to PAUSD.

RECITALS

WHEREAS, the Library and PAUSD desire to collaborate on activities to improve the educational opportunities and outcomes of the children both institutions share;

WHEREAS, in order to achieve an effective collaboration, the Library and PAUSD need to share information about the children that may otherwise be prohibited from disclosure; then

For and in consideration of the mutual promises set forth in this Agreement, the parties do mutually agree as follows:

SECTION A. Obligations of the Palo Alto City Library.

1. The Library will streamline student access to databases, print and e-materials by integrating PAUSD Student School Library barcode numbers and the Library Palo Alto Student Asset Card initiative, allowing every student in PAUSD schools seamless access to Library

179
databases and materials. Implementation will include training for students and staff on the Library's educational resources.

2. Work collaboratively with PAUSD to further deepen the partnership between the agencies.

3. The Library will provide the information to PAUSD as specified in this Agreement.

SECTION B. Obligations of PAUSD.

1. Support implementation of the Palo Alto Student Success Card initiative by providing to the Library the following directory information: Student School Library Barcode Number, first and last name, birthdate, school, grade, address, phone number, and email address of each student enrolled in PAUSD.

2. In collaboration with Library staff, help to facilitate the introduction of professional development opportunities for Palo Alto teachers and staff surrounding the Palo Alto Student Asset Card initiative and other Library projects.

SECTION C. Confidentiality.

1. PAUSD shall continue to maintain student records in accordance with all applicable federal and state laws and regulations. Such student records are confidential as provided under the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g; 34 C.F.R. Part 99; and California Education Code §§ 49060 et seq.

2. Any "directory information," as defined by California Education Code § 49061 that is released by PAUSD pursuant to this Agreement, shall be released in accordance with California Education Code §49073. Directory information includes student name, address, telephone number, date of birth, email address, major field of study, participation in officially recognized activities and sports, dates of attendance, degrees and awards received, and the most recent previous school attended.

3. Any confidential registration, record information, and information related to the circulation of records that is released by the Library pursuant to this Agreement shall be subject to the California Public Records Act, including Government Code §§ 6254 and 6267.

4. In addition to the specific statutes enumerated in this Agreement, the Parties shall comply with all applicable federal and state laws in their exchange of student information.

5. All information exchanged between parties pursuant to this Agreement shall only be used for advancing the Parties’ mutual goals of increasing literacy and educational success. Parties shall limit disclosure of the exchanged information within its own organization to its directors, officers, employees and legal counsel who have a need to know. This includes but is not limited to the Library’s staff, the Palo Alto Office of the City Attorney, PAUSD’s Executive Director of Research and Development, and site principals.

6. Use any and all student data received as part of the program for only these purposes:
a. Proper administration of Student Library Card circulation records; and
b. Marketing library programs of specific interest to PAUSD students. Any such
marketing effort will be conducted on an "opt out" basis.
c. Analysis of library usage and demographic information by third-party market
analysis entity in contract with the Palo Alto City Library.

SECTION D. General Provisions.

1. Term. The term of this Agreement begins on the Effective Date and will terminate on
October 31, 2018. This Agreement may be extended thereafter by mutual written agreement signed
by both Parties.

2. Project Manager. PAUSD shall name one or more Project Managers. The Project Manager
shall be PAUSD's representative(s) for the purposes of this Agreement and are fully authorized to act
on behalf of PAUSD pursuant to this Agreement.

3. Library Supervisor. The Library shall designate one or more Supervisors. The Library
Supervisor(s) shall be the Library's representatives for purposes of this Agreement and are fully
authorized to act on behalf of the Library pursuant to this Agreement.

4. Indemnity/Hold Harmless. Both Parties agree protect, indemnify, hold harmless and defend
the other Party, its directors, officers, employees and agents, against any and all claims, losses,
liability, demands, damages, costs, expenses or reasonable attorneys' fees arising out of the negligent
performance or nonperformance of the relevant Party's obligations under the terms of this
Agreement.

5. Insurance. Both parties shall maintain and provide evidence of self-insurance for the
duration of this Agreement.

6. Expenses. Any expenses related to the provision of services incurred by the Library shall be
the sole responsibility of the Library incurring such costs. All costs related to the provision of student
ID cards will be the sole responsibility of PAUSD.

7. Termination. Either Party may terminate this Agreement without cause at any time by giving
thirty days' prior written notice to the other Party of such termination and specifying the effective
termination date.

8. Partnership. The provisions of this Agreement are not intended to create, and shall not be
interpreted to create a joint venture, a partnership or any similar relationship between the parties.

9. Amendments. Any amendments or modifications to this Agreement must be mutually agreed
upon by the Parties in writing.

10. Governing Law and Venue. This Agreement will be governed by and construed in
accordance with the laws of the State of California, the Charter of the City of Palo Alto, and the Palo
Alto Municipal Code. The Parties will comply with all applicable federal, state and local laws in the
exercise of their rights and the performance of their obligations under this Agreement.
11. Notices. Any notice, request, consent or approval by a Party that is required to be furnished by this Agreement, will be given, in writing, and delivered by personal service, the United States Postal Service, mailed, first class, postage prepaid, or by facsimile transmission, to the following:

To Palo Alto City Library:
Monique le Conge Ziesenhenne
Library Director
Palo Alto City Library
270 Forest Avenue
Palo Alto CA 94301

To Palo Alto Unified School District:
Derek Moore
Chief Technology Officer
Palo Alto Unified School District
25 Churchill Avenue
Palo Alto, CA 94306

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the date written above.

City of Palo Alto

Palo Alto Unified School District

City Manager

PAUSD CBO or Designee

Approved for forwarding:

Superintendent and Secretary

Director of Library Services
MEMORANDUM OF UNDERSTANDING BETWEEN
THE CITY OF PLEASANTON AND
THE PLEASANTON UNIFIED SCHOOL DISTRICT
RELATED TO LIBRARY CARDS

THIS MEMORANDUM OF UNDERSTANDING ("MOU") is entered into this 3rd day of October, 2017, between the CITY OF PLEASANTON, a municipal corporation ("City"), and the PLEASANTON UNIFIED SCHOOL DISTRICT ("District").

RECITALS

1. City and District have the shared goal of providing pupils with easy access and use of the Pleasanton Library’s ("Library") electronic and print resources; and

2. City and District wish to establish a program that allows the use of pupil identification cards as Library cards that complies with the provisions of section 49073.1 of the Education Code.

NOW, THEREFORE, the parties agree as follows:

I. OBLIGATIONS OF DISTRICT

A. District will annually provide to Library staff: first and last name, birthdate, school, grade, address, phone number, and email address of each pupil enrolled in District ("pupil records") in accordance with all relevant federal and state laws, including the federal Family Educational Rights and Privacy Act (20 U.S.C. § 1232g). (§ 49073.1(b)(8).)¹

B. District will develop and implement an annual parent opt-in process for those parents who wish their pupil to participate.

II. OBLIGATIONS OF CITY

A. Library staff will allow District’s pupils who have not opted-out of participating to use their pupil identification cards to access Library databases, print and e-resources.

B. City will maintain all pupil records in a secure computer environment and not copy or reproduce such records except as necessary to fulfill its obligations under this MOU.
   i. City understands that the pupil identification cards used to access Library databases, print, and email resources rely on the Pupil’s Identification Number ("PIN"), and that the PIN is considered a

¹ All statutory references are to the Education Code unless otherwise designated.
pupil record to be protected to the same extent as other pupil records under this MOU.

C. City will provide training to designated Library staff responsible for implementing the terms of this MOU to ensure the security and confidentiality of pupil records. (§ 49073.1(b)(5).)

D. To the extent that Library staff have access to any personally identifiable information from pupil records: (1) it will not use such information for any purpose, including targeted advertising, except for the legitimate educational purpose of providing services pursuant to this MOU; and (2) it shall not disclose this information to any other party for any reason, except as required by law. (§ 49073.1(b)(3) and (9).)

E. Pupil records will not be retained or available to City upon the completion of the terms of this MOU. City will destroy all personally identifiable data obtained under this MOU when it is no longer needed for the purpose for which it was obtained, or transfer such data to the District or District's designee, according to a schedule and procedure agreed upon by the City and District. However, this provision shall not apply to pupil-generated content to the extent that the pupil chooses to maintain a personal Library account with the City, which is not subject to this MOU. (§ 49073.1(b)(7).)

III. TERM

A. This MOU will commence on October 3, 2017, and terminate June 30, 2018, unless terminated earlier as described below. Thereafter, this MOU may be extended by written amendment at City’s discretion for an additional 5 years.

B. This MOU may be terminated by either party by giving 60-days advance notification to the other party in writing.

IV. MISCELLANEOUS PROVISIONS

A. Each party will comply with all applicable federal and state laws (including the federal Family Educational Rights and Privacy Act (20 U.S.C. § 1232g)) which govern pupil records and Library records. (§ 49073.1(b)(8).)

B. Pupil records continue to be the property of and under the control of District. (§ 49073.1(b)(1).)

C. Notwithstanding section IV.B, above, City will establish procedures by which pupils may retain possession and control of their own pupil-generated content, including options by which a pupil may transfer pupil-generated content to a personal Library account. (§ 49073.1(b)(2).)
D. City and District will establish procedures by which a parent, legal guardian, or eligible pupil, may review personally identifiable information on the pupil’s records and correct erroneous information. (§ 49073.1(b)(4).)

E. In the event of an unauthorized disclosure of any pupil’s records that are stored in the Library system, City shall immediately notify the District of the nature, scope and severity of the breach. District will develop and implement procedures for notifying the affected parent, legal guardian, or eligible pupil in the event of an unauthorized disclosure of the pupil’s records. (§ 49073.1(b)(6).)

F. This MOU may only be amended in writing and signed by both parties.

G. Any notice required to be given by this MOU will be sufficient if hand delivered, mailed, or sent prepaid by commercial overnight delivery services as follows or to such other addresses as the affected parties will specify in writing.

To City:

Library Services Department
City of Pleasanton
400 Old Bernal Ave.
Pleasanton, CA 94566

To District:

Pleasanton Unified School District
4665 Bernal Ave.
Pleasanton, CA 94566

H. To the full extent permitted by law, City and District shall each defend, indemnify and hold harmless each other as well as their respective officers, agents, employees, volunteers or representatives from and against any and all liability, claims, actions, proceedings, losses, injuries, damages or expenses of every name, kind and description, including litigation costs and reasonable attorney’s fees incurred in connection therewith, brought for or on account of personal injury (including death) or damage to property, arising out of or connected with any acts or omissions of that party or its officers, agents, employees, volunteers, or contractors or their subcontractors, when performing any activities or obligations required of that party under this MOU. Each party shall notify the other party immediately in writing of any claim or damage related to activities performed under this MOU. The parties shall cooperate with each other in the investigation and disposition of any claim arising out of the activities under this Agreement, providing that nothing shall require either party to disclose any documents, records or communications that are protected under peer review privilege, attorney-client privilege, or attorney work product privilege.
THIS MOU is executed the date and year first above written.

CITY OF PLEASANTON

By: ________________________________
   Nelson Fialho, City Manager

PLEASANTON UNIFIED SCHOOL DISTRICT

By: ________________________________
   David Lagland, Superintendent

ATTEST:

_______________________________
Karen Diaz, City Clerk

APPROVED AS TO FORM:

_______________________________
Daniel G. Sodergren, City Attorney
MEMORANDUM OF UNDERSTANDING

BETWEEN

THE CITY OF SALINAS

AND

SALINAS CITY ELEMENTARY SCHOOL DISTRICT

This MEMORANDUM OF UNDERSTANDING ("MOU") is entered into by and between the City of Salinas, a California charter city and municipal corporation, through the Salinas Public Library ("SPL"), a department of the City of Salinas, and the Salinas City Elementary School District ("SCESD"), for the purpose of engaging in collaborative projects that promote library and literacy services. SPL and SCESD may be referred to herein individually as a “PARTY” and collectively as the “PARTIES”,

RECITALS

WHEREAS, the mission of the SPL is to provide free and easy access to information, ideas, books and technology that can help to enrich, educate and empower the lives of every individual within the various and diverse communities of the city of Salinas; and

WHEREAS, the mission of the SCESD is that every SCESD student will receive a well-rounded education with multiple opportunities for all children’s success; and

WHEREAS, the SPL and the SCESD are partners in education for the students of the city of Salinas and have a tradition of collaborating to meet the needs of students in achieving their academic goals and share a vision of all children reading at grade level; and

WHEREAS, the Salinas City Council, with the support of the Salinas Public Library (SPL), has made it a priority to ensure that every SCESD student receives a public library card and has convenient access to library resources; and

WHEREAS, the California Department of Education has given formal support for the Student Success Initiative which advocates for public library card distribution to students, as well as for cooperative initiatives between public libraries and school districts.

NOW THEREFORE, in consideration of the terms, covenants and conditions hereinafter contained to be kept and performed by the respective PARTIES, the PARTIES agree to collaborate on a variety of projects described in this MOU that will lead to greater student success for SCESD students:

TERMS
SECTION 1 - TERM
The Term of this MOU shall commence on the last date all required signatures are obtained and shall continue in force and effect for a period of three (3) years. This MOU shall terminate without cause upon thirty (30) days written notice from either PARTY to the other PARTY stating that PARTY’s intent to terminate this MOU.

SECTION 2 – PURPOSE
The SPL and the SCESD agree to work collaboratively as outlined in this MOU to issue a public library card (called the SMA+RT Card: “Salinas Makes A+ Readers Together”) to all students in the SCESD and to provide other agreed upon library and literacy related services to SCESD. For School Year 2018-2019, SMA+RT Cards will be issued to a mutually agreed upon pilot group and will expand in a mutually agreed upon manner to include all SCESD students by the end of the term of this MOU. In addition to library card availability, SPL will offer a variety of other services, as described in this MOU to SCESD designed to enhance student success and promote a life-long love of reading.

SECTION 3 – SCOPE OF SERVICES
3.1 The SMA+RT Card will use the student’s SCESD issued identification number as the SMA+RT Card account number.

3.2 The SMA+RT Card will provide access to all electronic resources offered by the SPL, including research and homework databases; learning resources; downloadable e-books, audiobooks, music and magazines; and also, music and video streaming.

3.3 The SMA+RT Card will have limited borrowing privileges of physical materials at the three (3) SPL locations and will be limited to two (2) books, which must be returned before additional books will be allowed to be checked out.

3.4 Overdue fines or other fees will not be charged on any materials checked out with the SMA+RT Card.

3.5 Afterschool Homework Centers have been offered by SPL in three SCESD elementary schools: Los Padres Elementary, Sherwood Elementary and Roosevelt Elementary since 2014. This MOU is intended to formalize the terms of these services.

3.6 KinderMobile visits will occur monthly as scheduled by the SPL staff with the principal (or designated staff) of each elementary school.
SECTION 4 – CONFIDENTIALITY

4.1 SCESD will maintain student records in accordance with all applicable federal and state laws and regulations. Such student records are confidential as provided under the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g; 34 C.F.R. Part 99; and California Education Code §§ 49060 et seq.

4.2 California Education Code §§ 49061 and 49073 authorizes SCESD to release certain student records known as “directory information” to certain entities, including governmental agencies; directory information includes student name, address, telephone number, date of birth, email address, major field of study, participation in officially recognized activities and sports, dates of attendance, degrees and awards received, and the most recent previous school attended.

4.3 The California Public Records Act, at Government Code §§ 6254 and 6267 governs the confidentiality of registration and circulation records in libraries supported by public funds. It also governs the disclosure of record information.

4.4 SPL and SCESD agree that each entity shall comply with applicable federal and state laws relating to the confidentiality of the SPL provided information and the SCESD provided information.

4.5 Both Parties further agree that all information exchanged shall only be used for the purposes intended by this MOU, to limit disclosure of the exchanged information within its own organization to its directors, officers, and employees who have a need to know, and to not disclose any information to any third party (whether an individual corporation, or other entity) without the express prior written consent of the other Party. Each Party shall satisfy its obligations under this Paragraph if it takes affirmative measures to ensure compliance with these confidentiality obligations by its employees and others who are permitted access to or use of the SPL provided information and/or the SCESD provided information.

4.6 To the extent that SPL has access to any personally identifiable information from students’ education records, SPL agrees that it shall not use such information except for the legitimate education purpose of providing services pursuant to this MOU and that it shall not disclose this information to any other party for any reason. SPL’s staff agrees to comply with all applicable federal and state regulations governing the student records, including FERPA.

4.7 The sharing of information by government agencies pursuant to Government Code section 6254.5(e) does not constitute a waiver of the exemption of such information from any future disclosure or from disclosure to any other entity or individual. If the Parties agree that a document is confidential pursuant to the California Public Records Act, and subsequently exchange the document, the Parties shall each keep confidential any such document as permitted under Government Code Section 6254.5(e). The Parties shall seek to minimize the personnel that review
confidential documents and shall only allow necessary personnel to analyze the documents. For the City, such records may only be shared with SPL staff (including their supervisors), and City Attorneys assigned to the projects (including their supervisors). For the SCESD, such records may only be shared with the District Superintendent and staff assigned to the project, site principals, and the General Counsel and legal staff working on the project.

4.8 If either of the Parties receives a Public Records Act request seeking a document that has been designated as confidential and exchanged as described herein, the party receiving the request shall notify the other parties immediately, and the party receiving the request shall withhold the designated confidential documents from the Public Records Act response.

SECTION 5 – LIBRARY SMA+RT CARD OPERATING RESPONSIBILITIES

5.1 SPL will streamline student access to databases, print and e-materials with Student Success Virtual Library Cards (no physical card will be issued).

5.2 SPL will work jointly with the SCESD to develop information that describes the SMA+RT Card program to parents or legal guardians.

5.3 SPL will work jointly with the SCESD to provide training and information to SCESD teachers and administrators regarding the SMA+RT Card program.

5.4 SPL will provide sufficient time for library staff to visit local SCESD schools in their service area to build and strengthen local partnerships and provide information on the SMA+RT Card program.

5.5 SPL will share summary data with SCESD on student usage of SPL resources on a schedule requested by SCESD.

5.6 As resources (funding and staffing) are available, SPL will provide delivery of student or teacher requested material to SCESD schools. SPL and SCESD will mutually agree on the schedule and terms for this service.

5.7 SPL will bring the KinderMobile to each school in the SCESD on a monthly schedule to allow kindergartners to check out books.

SECTION 6 – SCESD SMA+RT CARD OPERATING RESPONSIBILITIES

6.1 SCESD will distribute pertinent information about the SMA+RT Card program to parents or legal guardians.

6.2 SCESD will provide SCESD student data to the SPL integrated library system via a secure electronic delivery method monthly.
6.3 SCESD will work jointly with the SPL to develop and distribute handouts and website information to create awareness of the SMA+RT Card program.

6.4 SCESD will provide sufficient time for SCESD staff members, including teachers and administrators, to attend or participate in training or webinars, or other promotional events, provided by the SPL.

6.5 SCESD will work jointly with the SPL to provide training and information to SCESD teachers and administrators regarding the SMA+RT Card program.

6.6 SCESD will provide evaluation and feedback to the SPL and assist with obtaining feedback from SCESD teachers, administrators, students and their families or legal guardians.

6.7 SCESD will work jointly with the SPL public information group for any promotions and events. Ensure promotional materials include language that states “SCESD in collaboration with the City of Salinas Public Library”.

6.8 SCESD will communicate to kindergarten teachers and parents about the KinderMobile schedule and accommodate the visit with space to park.

SECTION 7 – HOMEWORK CENTER OPERATIONS

7.1 SPL operates afterschool Homework Centers in Sherwood Elementary, Los Padres Elementary and Roosevelt Elementary from 2:15 P.M. to 5:30 P.M. Monday through Friday. Hours may vary slightly by location and adjustments may be made as requested by the SCESD staff when school hours vary. These centers are focused on assisting students with achieving specific academic goals.

7.2 SPL is responsible for funding tutors involved in the operation of these homework centers and providing adequate supervision to these tutors.

7.3 The City of Salinas shall screen, pursuant to Section 11105.3 of the Penal Code, all employees or volunteers, having supervisory or disciplinary authority over a minor, to ensure they have not been convicted of a serious criminal offense.

7.4 SPL is responsible for providing materials to operate the homework centers.

7.5 SCESD will provide a suitable space for Homework Center operations and allow SPL staff to access this space within the schools during the designated times.

7.5 SCESD teachers will refer students to the Homework Centers as is appropriate and communicate with Homework Center staff regarding the academic needs of the students referred.
7.6 In order to measure the effectiveness of Homework Center services offered, teachers will provide feedback to Homework Center staff on a periodic basis regarding improvements made a student’s academic progress.

7.7 SPL will guarantee that all Homework Center employees and volunteers have been TB tested.

SECTION 8 - NOTIFICATION TO PARTIES
8.1 The representative of the PARTIES who are authorized to administer this MOU and to whom formal notices, demands, and written communications shall be given are as follows:

**LIBRARY**
Salinas Public Library
Attn: Library and Community Services Director, Cary Ann Siegfried
350 Lincoln Avenue
Salinas, CA 93901
Telephone: (831) 758-7311
Email: caryanns@ci.salinas.ca.us

With Copies to:
City of Salinas
City Manager
200 Lincoln Avenue
Salinas, CA 93901

City of Salinas
City Attorney
200 Lincoln Avenue
Salinas, CA 93901

**SCESD**
Salinas City Elementary School District
Attn: District Superintendent, Martha Martinez
840 South Main Street
Salinas, CA 93901
Phone: (831) 753-5600
Email: mmartinez@salinascity.k12.ca.us

8.2 Formal notices, demands and communications to be given hereunder by either PARTY shall be made in writing and may be effected by personal delivery or by registered or certified mail, postage prepaid, return receipt requested or through electronic mail (Email), facsimile (Fax), or hard copy and shall be deemed communicated as of the date of receipts.

Memorandum of Understanding – SMA+RT Card Page 6 of 8

192
8.3 If the name of the person designated to receive notices, demands or communications, or the address or other pertinent information of such person is changed, written notice shall be given to the other PARTY within ten (10) working days of such change.

SECTION 9 – PUBLIC ENTITY MUTUAL HOLD HARMLESS CLAUSE
Each PARTY agrees to defend, indemnify and hold the other harmless from all loss or liability for injury or damage, actual or alleged, to person or property arising out of or resulting from the indemnifying PARTY’s acts or omissions in the performance of this MOU. The provisions of California Civil Code Section 2778 regarding interpretation of indemnity agreements are hereby incorporated into this section.

SECTION 10 – ASSIGNMENT AND SUCCESSORS
Neither PARTY may assign or otherwise alienate any of its rights under this MOU or delegate, subcontract, or otherwise transfer any of its duties under this MOU, unless evidenced by a written amendment to this MOU executed by both PARTIES.

(SIGNATURE PAGE TO FOLLOW)
IN WITNESS WHEREOF, the PARTIES have caused this MOU to be executed by their duly authorized representatives as of the dates indicated below:

**CITY OF SALINAS**

BY: ____________________________
NAME: Ray E. Corpuz, Jr.
TITLE: City Manager
DATE: __________________________

---

**SALINAS CITY ELEMENTARY SCHOOL DISTRICT**

BY: ____________________________
NAME: __________________________
TITLE: __________________________
DATE: __________________________

---

**APPROVED AS TO FORM:**

BY: ____________________________
NAME: Christopher A. Callihan
TITLE: City Attorney
DATE: __________________________

---

**ATTEST:**

BY: ____________________________
NAME: __________________________
TITLE: Executive Assistant
DATE: __________________________
Memorandum of Understanding

between

Sonoma County Library

and

Santa Rosa City Schools

December 1, 2017

This memorandum of understanding (MOU) between Sonoma County Library (SCL) and Santa Rosa City Schools (SRCS) stipulates that the parties agree to the following regarding the Student OneCard Initiative, through which every student in the SRCS district can use his/her student ID card as a Sonoma County Library card.

Student OneCard library accounts are created through data upload from the school's student information system. Students can have a Student OneCard account in addition to a regular library account. The primary goal of Student OneCard accounts is to support student access to SCL resources that enhance their educational needs. This initiative will provide opportunities for SCL staff to support students in their studies and efforts toward graduation by assisting them with increased literacy skills, access to multi-learning resources in all academic subject areas, online homework assistance in both English and Spanish, resources for preparation for college attendance, and the like.

Special privileges and restrictions of a Student OneCard account include:

- Physical Card: There will be no physical card issued; students will use a district code plus student ID number
- Electronic Resources and Services: Students will have unlimited access to most electronic resources and services, including e-books, e-audio, online tutoring, and online test preparation.
- Loan Period: Three weeks
- Loan Limits: A student may have up to 10 items checked out at one time. Restricted items include DVDs, Games, streaming media, and museum passes.
- Fines: None
- Fees: Students are responsible to pay replacement fees for lost items. Replacement fees for up to two lost items per year will be forgiven.

SRCS students' parents or guardians who do not wish their student to participate in the Student OneCard initiative will have the opportunity to opt-out of inclusion. SRCS will develop and implement an annual parent opt-out process. Parents who do not opt-out will be considered to have given consent to
allow their students to participate, and will accept responsibility for materials checked out using the Student OneCard account.

The SRCS Student Information System's team will provide SCL with the necessary student data in .csv format on a weekly basis, to account for changes in enrollment. Data to be provided includes:

- Name, in a single column, in "last, first" format
- Student ID#
- Birth date - Standard mm/dd/yyyy format is best
  (Note: birth year will be used as PIN)
- Mailing address
  (Note: Use school address for students who have no home mailing address)
- City, state (either in one or two columns)
- ZIP Code
- Phone number
- Email address

Both SRCS and SCL acknowledge that certain material or information regarding students may consist of confidential records subject to the federal Family Educational Rights and Privacy Act (FERPA) or other privacy laws. Sonoma County Library's use of student data for Student OneCard is compliant with FERPA, and SCL agrees to hold all information in confidence and only used in performance of the MOU. To further support and recognize the importance of compliance with student data privacy, all library staff will complete mandatory annual training on Sonoma County Library's Confidentiality Policy.

The Student OneCard initiative will be reviewed and evaluated annually. In partnership with SCL, SRCS will identify pre- and post-measures to determine progress towards achieving District and Library goals.

To the full extent permitted by law, SRCS and SCL shall each defend, indemnify and hold harmless each other as well as their respective officers, agents, employees, volunteers or representatives from and against any and all liability, claims, actions, proceedings, losses, injuries, damages or expenses of every name, kind and description including litigation costs and reasonable attorney's fees incurred in connection therewith, brought for or on account of personal injury (including death) or damage to property, arising out of or connected with any acts or omissions of that party or its officers, agents, employees, volunteers, or contractors or their subcontractors, when performing any activities or obligations required of that party under this Agreement. Each party shall notify the other party immediately in writing of any claim or damage related to activities performed under this Agreement. The parties shall cooperate with each other in the investigation and disposition of any claim arising out of the activities under this Agreement, providing that nothing shall require either party to disclose any documents, records or communications that are protected under peer review privilege, attorney-client privilege, or attorney work product privilege.
Further, SRCS accepts responsibility for determining and approving the character and fitness of its employees (including volunteers, agents or representatives) to provide the services required of SRCS under this Agreement, including completion of a satisfactory criminal/background check and periodic rechecks to the extent permitted by law. Notwithstanding anything to the contrary in this Paragraph, SRCS shall hold SCL and its officers, agents and employees harmless from any liability for injuries or damages resulting from a breach of this provision or SRCS’s actions in this regard.

(SIGNATURE PAGE TO FOLLOW)
IN WITNESS WHEREOF, the PARTIES have caused this MOU to be executed by their duly authorized representatives as of the dates indicated below:

SONOMA COUNTY LIBRARY,  
a Joint Powers Authority

BY:  

NAME: Tracy Gray
TITLE: Interim Library Director
DATE: 12/29/17

SANTA ROSA CITY SCHOOLS DISTRICT

BY:  

NAME: Andre' R. Bell
TITLE: Assistant Superintendent, Business Services
DATE: 1/30/17
1. **PURPOSE**

The purpose of this document is to establish a library policy that supports the Student OneCard and Educator Card initiatives to strengthen school-library partnerships.

2. **POLICY**

Sonoma County Library is establishing two separate types of Library Accounts to remove barriers to library use for students and teachers in Sonoma County schools. These accounts – Student OneCard Accounts and Educator Card Accounts - will have rights and privileges outside of regular Circulation Policies.

3. **REGULATIONS**

A. The primary goal of Student OneCard accounts is to support student access to materials that enhance their educational needs. Through the Student OneCard initiative, every student in a school district can use his/her student ID card as a library card. A Student OneCard account is not a physical card; instead, it is a separate library account created through data upload from the school’s student information system. Student can have OneCard account in addition to regular library account.

Parameters for Student OneCard accounts are as follows:

- Physical Card: There will be no physical card issued; students will use a student ID number
- Renewal: Tied to school data uploads
- Students are encouraged to have a regular library account in addition to a Student OneCard account
- Loan Period: Three weeks
- Loan Limits: A student may have up to 10 items checked out at one time. Restricted items include DVDS, Games, streaming media, and museum passes.
- Fines: None
- Fees: Students are responsible to pay replacement fees for lost items. Replacement fees for up to two lost items per year will be forgiven.
B. The primary goal of Educator Card accounts is to provide teachers access to materials that support their students in the classroom. Through the Educator Card initiative, teachers of all levels may apply for a separate physical card that allows them to supplement school resources to help bridge achievement gaps. Teachers can have an Educator Card account in addition to a regular library account.

Parameters for Educator Card accounts are as follows:

- **Physical Card**: There will be a separate physical card issued
- **Card Renewal**: Annual in August; show proof of employment as teacher
- **Educators are encouraged to have a regular library account in addition to an Educator Card account**
- **Loan Period**: Six weeks
- **Loan Limits**: An Educator may have up to 50 items checked out at one time. Restricted items include Games, streaming media, and museum passes.
- **Fines**: None
- **Fees**: Educators are responsible to pay replacement fees for lost items. Replacement fees for up to four lost items per year will be forgiven.

C. Sonoma County Library’s use of student data for Student OneCard is compliant with the Family Educational Rights and Privacy Act (FERPA). To further support and recognize the importance of compliance with student data issues, all library staff will complete mandatory training on Sonoma County Library’s Confidentiality Policy annually.

D. The Student OneCard and Educator Card initiatives will be reviewed and evaluated annually.
Shasta Public Libraries
Student Library Card Initiative

Strategic Plan, 2017-2022

Based on the ultimate goal of reaching every student in Shasta County, this document lays out a *tentative* 5-year plan for the Shasta Public Libraries’ Student Library Card Initiative. It includes a summary of the past year, a plan for adding the rest of the schools to the Initiative, and future improvement.
Where we are now

The Numbers

Since 2014, Shasta Public Libraries has partnered with 13 out of 26 public school districts in Shasta County to get their students public library cards. So far, 11 out of the 13 school districts have received cards.

In the 2016-2017 school year, Shasta Public Libraries reached an estimated 13,278 Shasta County students out of the 26,315 enrolled in public schools.¹

Circulation stats are a way we can measure “success” of the Student Library Card Initiative. The data are generated by school (measuring number of check-outs per school). However, these are not entirely accurate. Not all student accounts have the “School Name” field filled in Polaris, which skews stats. However, because newly-created accounts already have the “School Name” field, we can infer that any circulation increase is due to new students coming in to check out materials.

¹ Enrollment stats from California Department of Education, school year 2015-2016.
The bar graph above shows a few of the schools who have been involved with the Student Library Card Initiative for more than one year. For those that have a decent spike in circulation, this occurred immediately after their new cards were delivered. With schools such as Bonnyview, Manzanita, and Sequoia, circulation seems to return to what it was before after the spike. Schools like Foothill HS and Juniper show no reaction. It is too early to tell with the high schools that were just delivered in January and February, which have definitely spiked in circulation since, whether they will dip back to a lower level.

Currently, there is no set way to measure database usage by student card. However, we were able to see a spike in Help Now! use (our most promoted online educational resource) in October 2016. This correlated with many schools receiving their cards and much outreach being done for educational services that month.

**Current Work Plan**

Most school districts have agreed to send over a student data file of directory information from the Aeries student information system. This is imported to create individual accounts in Polaris. The data file includes all students and will
make individual account for everyone, including those that we have made cards for before.

In November 2016, it was decided to make new cards for all of the duplicate records that were inactive (not currently using their card) and to waive overdue fines for these accounts. These were to serve as a reminder to use the library resources, replace old or lost cards, and offer a “clean slate” to those with certain fines.

As of January 2017, a staff work plan was implemented that required all associates to work on processing school cards with a minimum amount that needed to be completed per week (as shown below):

<table>
<thead>
<tr>
<th>Student Card Work Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-29 hours: 50 cards per week</td>
</tr>
<tr>
<td>30-40 hours: 60 per week</td>
</tr>
<tr>
<td>Duplicates: 50 per week</td>
</tr>
</tbody>
</table>

With this plan, we completed 10,530 cards out of the 13,278 total in **two months**.

**Feedback**

In the youth department, there have many instances of positive feedback concerning the student cards. The staff see many new families brought to the library because of their new student card. We are now beginning to track these incidents and interactions system-wide in the daily tally sheet. This will give us more statistical data on student library cards for future use.

There have been students who received a duplicate card and were confused as to why they received a new card. Some wanted to change back to their old card, others were fine with the new one. At least one student came in not pleased with the fact that she was told her overdue fines were waived and discovered she still had over $100 in fines (collection agency and other fees).

New school districts had overall positive feedback about receiving the cards. Only complaint was the amount of time it took to get the cards.
School districts that have received student cards in previous years had more to say:

- Resources the library provides are very valuable, but are students understanding that value?
- Distributing cards to students is burdensome (at least one school did not distribute cards until months afterwards)
- Confusion about duplicate cards
- Are there data to show if the students are using the cards or not?

We hope to address all concerns and hone all parts of this student library card program with our goal setting and implementation of a strategic plan.

**Where we’re going**

The Shasta Public Libraries wants to reach every student in Shasta County with its Student Library Card Initiative. Perceivably, *every student in Shasta County would have a library card.*

**How we’re going to get there**

**Processing**

We will only issue student cards to new students/those who do not already have a card. We will not be issuing new cards to students who already have one because we are now able to receive data from schools that only contains their new students.

We have ten associates working on student cards that work between 0-29 hours and seven associates/lead associates/one librarian that work between 30-40 hours (the lead associates and librarian previously worked on duplicates, but will no longer). Based on the current Student Card Work Minimum, ten associates would be processing 50 cards per week, and seven associates would be
processing 60 cards per week, individually. This means we would be tentatively processing **920 cards per week**.

Due to registration processes and enrollment fluctuations, student data should be sent over and processing should begin about one month after the first day of school (end of September) for more accuracy.

It is hard to estimate the number of new students each district will have for us to process. If we estimated each of the 11 school districts that received cards this year to send us over 500 new students at the end of September, we would need to process 5,500 new cards.² If we were able to process 920 cards per week, this means we would be able to get all of the cards finished in 6 weeks.

If we start processing at the end of September, all of the new students from districts we have done previously should be done by the middle of November.

**Adding More Schools** (Please see the Master School List for reference)

**Public Schools**

Public schools are the greatest priority for this Initiative. We have partnered with 13 public school districts so far, and have 13 more to reach all of the public schools in Shasta County. Six of the remaining 13 are high priority – they are closest to our libraries and contain the most students. These should be reached out to first before other districts. The other seven districts are “outlier” and low priority – they are very far away from any of our libraries, have very small student bodies, and their technology abilities are unknown.

**Charter Schools**

Each charter school in Shasta County has a sponsoring public school district. Because of this, we have already added a few charter schools easily to the Initiative. However, certain charter schools may have a different relationship with the sponsoring district. They may be more separate from the district and have

² Of course, the true number of new students may be less than this. Firstly, not all school districts are the same size. 500 is an estimate based on the largest districts we serve (more than 3,000 students). Also, there may be duplicates within data files of new students if a student transfers between districts that we serve.
more independence in operations. For the most part, charter schools will need to be talked to separately to join the Initiative (the Master School List notes which charter schools are more likely to be grouped with their district and which are more likely to be separate). Also, some of the charter schools do not use Aeries, so it is unclear if their Student Information System is a SQL or Oracle database.

Private Schools

Private schools will need to be talked to separately to receive library cards. None of the private schools use Aeries, so it is unclear if their Student Information Systems are a SQL or Oracle database. Because of this and the small student body sizes of these schools, private schools are deemed relatively low priority for now.

New schools should be added to the library’s initiative incrementally. There is a remaining ~13,000 students from public and charter schools combined, while private schools have around ~1400 students. This gives us about 14,400 students we have not reached.

Feasibly, the library could handle evenly spreading this number over four years, which would give us an added 3600 students per year,\(^3\) assuming Shasta County student enrollment stays generally the same. From our 920 processed per week, this would take about 4 weeks. Totally processing time for all cards would be around 10-11 weeks.

Therefore, all student cards should be finished and delivered to schools by their Winter Break. This should apply to every school year.

For those school districts who desire cards on a more continual basis, we can do this upon request beginning in January.

Even though the library staff could handle added the remaining students over a four year period, the whole of the strategic plan will amount to five years,

---

\(^3\) Again, the actual number may be less than this. Even though we have not reached these schools yet, there will be students enrolled that already have a library card.
culminating in the year 2022, to give time to make connections with schools districts, figure out tech aspects, and adjust for any changes in enrollment.

Educator Cards

Aside from the student cards, there have been requests from a few school districts that teachers receive their own cards so that they can use the library’s resources along with their students and better assist them with their schoolwork. From an IT perspective, this seems plausible with data transfer from Aeries to the library’s ILS, employing the same opt-out function as student cards. However, educators’ cards will be different from their students.

Educator cards will be given their own patron code and retain special privileges. The exact privileges have yet to be confirmed, but have tentatively been discussed as having unlimited checkouts and the ability to take home/to the classroom STEM and Maker kits the library will have available for checkout (whereas for other patrons, they are to be used in-house). The Educational Services Librarian and PR/Marketing Coordinator should meet to determine whether these cards should look different than the student cards.

Through the promotion of educator cards, communication between the library and school staff will become better, leading to better understanding and use of library resources.

Catering to Different Schools and Districts

The automated system of importing a student data file into Polaris is the ideal way the library will process student cards. However, we must note a few things:

1.) **Some schools do not use Aeries and/or do not use a SQL database.** The alternative database language is Oracle, which can be converted to SQL by someone who has the expertise to do so. Enterprise School District is the largest school district that uses such a database and there are no staff that are able to convert the student information. The Shasta Public Libraries also do not have a staff member to do so. Therefore, this will be something to
seek funding for in the future. The strategic plan and collection of statistics to show success will be able to assist with this need.

2.) Not all schools/districts have the IT capabilities or staff to make a data transfer happen on their end. Many of the smaller, outlier schools do not have a designated IT staff to handle sending over a student file to import or may not even have a legitimate Student Information System (SQL or Oracle). Since most of these schools/districts are relatively small, library card applications in registration or first-day packets should be promoted and planned for. The office staff must be reminded to take these applications from the students and turn them in to us for processing (don’t rely on the families to go to the library themselves).

3.) Not all schools/districts are okay with sending over their student data to us. Having the drafted MOU to assert our protection of student data has definitely alleviated some worries and brought over new schools to the Initiative, but there are still some who are very wary. Despite the protections we give and the legality of what we do, school administration often stress that their parents would not like the district office sending over their child’s information for a library card that they are financially responsible for. We have promoted paper library card applications instead, which many schools are happy to distribute; however, given the increasing amount of cards we will be processing, we will not be able to offer paper applications with the next school year. Instead, we will hold off on adding those schools to our Initiative and try for the next school year. The more other school districts in Shasta County are okay with all processes and are added to the Initiative, the more other hesitant school districts seem more at ease with everything. However, if there are some school districts that still hold off, we may need to re-evaluate our approach. To appease school officials and parents, other library systems have either created limited use (Internet only) student cards or cards that do not accrue overdue fines. Whether this is possible is up for discussion.
Secondary Goal

The secondary goal of the Student Library Card Initiative is to ensure that students are using the library cards with the added intention of increasing use of student cards, either in circulation or online database use. This will include finding a way to harvest more statistical data to track student card use, increasing communications and marketing of the Initiative, ensuring teachers and students know what resources we have and how to use them, and beginning to work with schools to incorporate the library resources into the classroom. After we have a solid foundation for processing cards and are on our way to project completion, we will be able to focus more on this goal.

Statistics

Shasta Public Libraries already has a method of tracking circulation from student cards, but has yet to find a way to track student card use of online databases. This is an issue with other library systems doing similar programs. Certain collaborative projects have presented a need to communicate as a group with the database companies to attempt to reach this need. Until this is met, Shasta Public Libraries does track general use of its online databases. The ability to see an increase in use of our educational databases (Help Now, Explora) as the Student Library Card Initiative expands to more schools may imply an increase in student use.

Communications and Marketing Plan

Effective communication between the library and the schools can be greatly improved. All aspects of the student cards need to be made clearer and more accessible to teachers and school staff to avoid any miscommunication or issues.

Additionally, teachers and school staff have busy and varied schedules, making them difficult to reach and schedule library trainings for staff, talks for classes, and storytimes for earlier grades.

In order to increase communication between the schools and the library, the Educational Services Librarian and PR/Marketing Coordinator will meet to discuss
a Marketing and Communications Plan for the Student Card Initiative during the summer of 2017. The forthcoming plan will discuss:

- Defining exactly what aspects of the program that teachers must be made clear about and how to communicate this with them
- Educational Services webpage on the library’s website with more information for teachers
- Changing the way that the cards look and are presented – the current form is outdated and not great for delivering in large quantities
- Ensuring that teachers and students are aware of library resources and know how to use them

Once these plans are executed, the next step will be to develop more regular programs for schools and classrooms to accompany the Student Library Card Initiative. Class visits and presentations are already being done at request, but developing a more official and advertised way of class support will greatly increase communication and positive association between both agencies. These programs could potentially include:

- Interactive classroom presentations on using library resources
- Book talks for classrooms
- Developing assignments with teachers that incorporate library resources

Funding and Sustainability

Currently, there is no official budget for Shasta Public Libraries’ Student Library Card Initiative. The City of Redding has provided funds for necessary materials (library cards, cardstock), but if the program is to expand and be sustained on the libraries’ limited program budget, funding will need to be sought out from a different source. Aspects of the Initiative that require additional funding include IT support to transfer Oracle-supported SSIs to Polaris, promotional materials, and future program materials.

Listed below are grant opportunities that may be beneficial to the sustainability of the Student Library Card Initiative:
• Redding Rancheria Community Fund
• Innovation In Libraries Grant from The Awesome Project
  http://www.awesomefoundation.org/en/chapters/libraries
• Loleta D. Fyan Grant http://www.ala.org/awardsgrants/awards/154/apply
• Penguin Random House Library Awards for Innovation
  http://foundation.penguinrandomhouse.com/libraryawards/guidelines-and-application/

**Conclusion**

The Student Library Card Initiative of the Shasta Public Libraries should reach completion (incorporating all schools) by the year 2022. For each school year, the total amount of cards processed should be finished by the first or second week of December to ensure all students have cards by their Winter Break. This would allow more focus on outreach in the schools during the second half of the school year and ensuring that students know how to use their library cards.
Technical Details - Communicating with Vendors

Notifying a Database Vendor of New Cards

Good day everyone:

The Napa County Library is partnering with the Napa Valley Unified School district to give students greater access to our resources.

This new card will be NVUSD + 6 digits. Example: NVUSD123456.

There is no structure for the 6 digits other than, at present, it begins with 1. But eventually will roll into 2.

That means our library now includes 4 variants of users: 21128XXXXXXX, 21199XXXXXXX, PACREGXXXXX, NVUSDXXXXXX.

PIN requirements, for those databases/services that have true SIP authentication, will remain unchanged: 4 digits.

I am also including our various PORT, IP & other authentication settings for those with a direct connection into the system.

Please confirm when setup is complete or if you need me to contact technical support directly.

Thanks very much for your help to make our library accessible to a larger portion of the community.
Importing Student Records as Patron Records

©2016
Polaris 5.1.261
rev.9
Importing Student Records

You can import student records from education registration systems for use in Polaris as patron records. Innovative Interfaces does the first import for you during data migration, if you request this service. Then at the beginning of each new term, or whenever you need to update the Polaris database, you follow these steps to import the new student patrons:

- Export the student records from your student registration system to a .TRN file
- Upload the .TRN file into Polaris

See also:

- "Exporting Records From Your Registration System" on page 2.
- "Scheduling Your Updates" on page 2.
- "TRN File Format" on page 3.
- "Data Dictionary" on page 6.
- "Including Both School and Home Addresses" on page 13.
- "Uploading Student Data to Polaris" on page 14.
Exporting Records From Your Registration System

You export the student records from your registration system to a .TRN (transaction) file, which is the Polaris offline file format for upload. This file maps the data in your registration system to Polaris data fields. You are responsible for creating the file and ensuring that it conforms to the necessary format and content. See "TRN File Format" on page 3. Innovative Interfaces does not provide software for exporting information from your student record system. However, if you provide a sample patron upload file, we can assist you in evaluating the file to make sure it meets the necessary format requirements. For details about required and optional data, see "Data Dictionary" on page 6.

Among the requirements are these:

You must include a valid Polaris Patron Code ID for each student. If you are in the process of implementing Polaris for the first time, your Polaris Implementation Manager can provide a Polaris Code Sheet that lists the Polaris codes set for your system. If you are already using Polaris, obtain an updated Polaris Code Sheet from your Polaris Site Manager, since your Polaris Patron Codes may have changed since you first implemented Polaris. See "Patron Code ID" on page 6.

You must include assign a unique patron barcode to each patron’s information before the .TRN file is created. See "Patron Barcode" on page 7.

Scheduling Your Updates

When you update the Polaris database with new student data, the data in the new .TRN file overlays the data in the current patron records, so you must include all the data fields in your .TRN file. (Blank fields will remove information from the equivalent fields in existing records when the file is uploaded.) If you use Record Code 7 in each patron’s data, new patrons are created as necessary, while all existing data in current patron records is updated with the data in the new .TRN file. See "Record Code" on page 6.

Since a large file that includes all student data may be time-consuming to create and upload because it replaces all the existing data, an alternative strategy is to export and do periodic uploads of new student data only (Record Code 5). Also, individual student data can be updated in Polaris at any time, using the Patron Registration workform.
Importing Student Records as Patron Records

TRN File Format

The upload file must be a flat ASCII text file whose contents are pipe delimited and in the form specified below.

File Name

The file name must be in the format:

PTF_<YYYY><MM><DD><HH><MI>_<WorkstationName>.TRN

Where:

<YYYY> is the four digit year
<MM> is the two digit month
<DD> is the two digit date
<HH> is the two digit hour
<MI> is the two digit minute
<SS> is the two digit second

<WorkstationName> is the network computer name of a valid Polaris staff client workstation

File Header

The file begins with a one-line header in this form:

1 |<time>|<date>|<branchID>|<userID>|<workstationID>|20

Where:

<time> is in the form HH:MM:SS
<date> is in the form <MM>/<DD>/<YYYY>
<branch> is a valid Polaris OrganizationID with an organization code ID of 3 (Branch). This number is the Polaris record number, visible in the Polaris Branch workform as shown in the example below:

![Polaris Branch Workform](image1.png)

<br>

<User> is a valid Polaris staff client user ID with Polaris permission to use offline Polaris. This number is the Polaris record number, visible in the Polaris Staff Member workform as shown in the example below:

![Polaris Staff Member Workform](image2.png)
<workstation> is a valid Polaris workstation ID with Polaris permission to use offline Polaris. This number is the Polaris record number, visible in the Polaris Workstation workform as shown in the example below:

At the end of the header data, insert a CR (ASCII character 13) to indicate the end of the header.

**Patron Content**

Each row represents a single, implicitly structured data item (a patron). Insert a CR (ASCII character 13) at the end of each row to indicate the end of that patron’s data. Many patrons may be included in the patron file. The row takes this form:

```
<record code>|<creation date>|<Name Last>|<Name First>|<Name Middle>|<Name Title>|<Name Suffix>|<Patron Code ID>|<Patron Branch ID>|<Patron Barcode>|<Expiration Date>|<Patron Statistical Code ID>|<Gender (F, M, N)>|<Password>|<Language ID>|<Registration Date>|<Birth Date>|<Permission (currently is not being used)>|<Maintain Reading List (1, 0)>|<Former ID>|<User Defined Field 1>|<User Defined Field 2>|<User Defined Field 3>|<User Defined Field 4>|<User Defined Field 5>|<Do Not Delete (1, 0)>|<Exclude From Bills (1, 0)>|<Exclude From Collection (1, 0)>|<Exclude From Holds (1, 0)>|<Exclude From Overdue Notice (1, 0)>|<Use Plain Text E-mail (1, 0)>|<Address Label>|<Address Type>|<Street One>|<Street Two>|<City>|<State>|<Postal Code>|<Zip Code Plus Four>|<County>|<Country ID>|<Address Check Date>|<E-mail Address>|<Alternative E-mail Address>|<Phone 1>|<Phone1CarrierID>|<Phone 2>|<Phone2CarrierID>|<Phone 3>|<Phone3CarrierID>|<Fax Number>|<Delivery Option ID>|<PatronRecordID>|<EnableSMS>|<eReceiptOptionID>|<TxtPhoneNumber>
```

Data Dictionary

The table lists required and optional data fields.

If a required field contains data that your student record system does not include, you must supply a default value. Valid values are shown in the table.

If you do not use an optional field, supply an empty pipe for the field.

<table>
<thead>
<tr>
<th>Column</th>
<th>Data Type</th>
<th>Max Data Length</th>
<th>Valid Codes/Format</th>
<th>Data required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Code</td>
<td>Integer</td>
<td>n/a</td>
<td>5 = New Patron&lt;br&gt;7 = Update Patron&lt;br&gt;&lt;br&gt;If you use Record Code = 7 for all patrons in the file, the system will update existing patrons and create new patrons if they do not currently exist in Polaris. See &quot;Scheduling Your Updates&quot; on page 2..</td>
<td>Y</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Date</td>
<td>n/a</td>
<td>YYYY-MM-DD</td>
<td>N</td>
</tr>
<tr>
<td>Patrons Last Name</td>
<td>String</td>
<td>32</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Patrons First Name</td>
<td>String</td>
<td>32</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Patrons Middle Name</td>
<td>String</td>
<td>32</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Patron Name Title</td>
<td>String</td>
<td>8</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Patron Name Suffix</td>
<td>String</td>
<td>4</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Patron Code ID</td>
<td>Integer</td>
<td>n/a</td>
<td>A valid Polaris Patron Code. These are listed</td>
<td>Y</td>
</tr>
</tbody>
</table>
### Importing Student Records as Patron Records

<table>
<thead>
<tr>
<th>Column</th>
<th>Data Type</th>
<th>Max Data Length</th>
<th>Valid Codes/Format</th>
<th>Data required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patrons Branch ID</td>
<td>Integer</td>
<td>n/a</td>
<td>A valid Polaris OrganizationID having an OrganizationCodeID of 3 (branch). For information on obtaining this value, see &quot;File Header&quot; on page 3.</td>
<td>Y</td>
</tr>
<tr>
<td>Patron Barcode</td>
<td>String</td>
<td>20</td>
<td>Unique identifier; for example, the student identification number from the student database.</td>
<td>Y</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Date</td>
<td>n/a</td>
<td>YYYY-MM-DD HH:MM:SS</td>
<td>Y</td>
</tr>
<tr>
<td>Patron Statistical Code ID</td>
<td>Integer</td>
<td>n/a</td>
<td>A valid Polaris Patron Statistical Class Code ID</td>
<td>N</td>
</tr>
<tr>
<td>Gender</td>
<td>String</td>
<td>1</td>
<td>M, F, or N</td>
<td>Y</td>
</tr>
<tr>
<td>Password</td>
<td>String</td>
<td>16</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Language ID</td>
<td>Integer</td>
<td>n/a</td>
<td>LanguageID (1=English)</td>
<td>Y</td>
</tr>
<tr>
<td>Registration Date</td>
<td>Date</td>
<td>n/a</td>
<td>YYYY-MM-DD</td>
<td>N</td>
</tr>
<tr>
<td>Column</td>
<td>Data Type</td>
<td>Max Data Length</td>
<td>Valid Codes/Format</td>
<td>Data required?</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------</td>
<td>-----------------</td>
<td>-------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Date</td>
<td>n/a</td>
<td>YYYY-MM-DD</td>
<td>N</td>
</tr>
<tr>
<td>Permission</td>
<td>Integer</td>
<td>n/a</td>
<td>DO NOT USE</td>
<td>N</td>
</tr>
</tbody>
</table>
| Maintain Reading List       | Integer   | n/a             | 0 = Do not maintain  
1 = Maintain                     | Y              |
| Former ID                   | String    | 20              |                                     | N              |
| User Defined 1              | String    | 64              |                                     | N              |
| User Defined 2              | String    | 64              |                                     | N              |
| User Defined 3              | String    | 64              |                                     | N              |
| User Defined 4              | String    | 64              |                                     | N              |
| User Defined 5              | String    | 64              |                                     | N              |
| Do not delete               | Integer   | n/a             | 1 = Staff may not delete the patron  
0 = Staff may delete the patron                      | Y              |
| Exclude from bills          | Integer   | n/a             | 1 = Never bill this patron  
0 = This patron may be billed                                  | Y              |
| Exclude from collection     | Integer   | n/a             | 1 = This patron may not be sent to collection agency  
0 = This patron may be sent to collection agency                                  | Y              |
<p>| Exclude from holds          | Integer   | n/a             | 1 = This patron may not be sent hold notifications | Y              |</p>
<table>
<thead>
<tr>
<th>Column</th>
<th>Data Type</th>
<th>Max Data Length</th>
<th>Valid Codes/Format</th>
<th>Data required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclude from overdue</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = This patron may not be sent overdue notifications 0 = This patron may be sent overdue notifications</td>
<td>Y</td>
</tr>
<tr>
<td>Plain text</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = This patron only wants plain text notification 0 = This patron may be sent HTML notifications</td>
<td>Y</td>
</tr>
</tbody>
</table>
| Free Text Address Type    | String    | 30              | This label must be one of the following:  
~Home  
~Work  
~School  
~Primary  
~Alternate  
~Office  
~Other  
And must include the ~ character in front of the label. Indicates the start of an address group (street, city, etc.)  
To include multiple addresses for student, |

## Importing Student Records as Patron Records

<table>
<thead>
<tr>
<th>Column</th>
<th>Data Type</th>
<th>Max Data Length</th>
<th>Valid Codes/Format</th>
<th>Data required?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>see &quot;Including Both School and Home Addresses&quot; on page 13.</td>
<td></td>
</tr>
<tr>
<td>Address Type</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = Generic 2 = Notice</td>
<td>Y</td>
</tr>
<tr>
<td>Street One</td>
<td>String</td>
<td>64</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Street Two</td>
<td>String</td>
<td>64</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>String</td>
<td>32</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>State</td>
<td>String</td>
<td></td>
<td>2 character abbreviation</td>
<td>N</td>
</tr>
<tr>
<td>Postal Code</td>
<td>String</td>
<td>10</td>
<td>5 character postal code</td>
<td>N</td>
</tr>
<tr>
<td>Zip Plus Four</td>
<td>String</td>
<td>4</td>
<td>4 character Zip+ code</td>
<td>N</td>
</tr>
<tr>
<td>County</td>
<td>String</td>
<td>32</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Country ID</td>
<td>Integer</td>
<td>n/a</td>
<td>Country ID (1 = USA)</td>
<td>Y</td>
</tr>
<tr>
<td>Address Check Date</td>
<td>Date</td>
<td>n/a</td>
<td>YYYY-MM-DD</td>
<td>N</td>
</tr>
<tr>
<td>Email address</td>
<td>String</td>
<td>64</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Alternate Email Address</td>
<td>String</td>
<td>64</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Phone 1</td>
<td>String</td>
<td>20</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Phone 1 Carrier ID</td>
<td>Integer</td>
<td>2</td>
<td>Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.</td>
<td>N</td>
</tr>
<tr>
<td>Column</td>
<td>Data Type</td>
<td>Max Data Length</td>
<td>Valid Codes/Format</td>
<td>Data required?</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------</td>
<td>----------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Phone 2</td>
<td>String</td>
<td>20</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Phone 2 Carrier ID</td>
<td>String</td>
<td>20</td>
<td>Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.</td>
<td>N</td>
</tr>
<tr>
<td>Phone 3</td>
<td>String</td>
<td>20</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Phone 3 Carrier ID</td>
<td>String</td>
<td>20</td>
<td>Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.</td>
<td>N</td>
</tr>
<tr>
<td>Fax Number</td>
<td>String</td>
<td>20</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Delivery Option ID</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = Mail, 2 = Email, 3 = Phone1, 4 = Phone2, 5 = Phone3, 6 = FAX</td>
<td>N</td>
</tr>
<tr>
<td>Patron Record ID</td>
<td>Integer</td>
<td></td>
<td>Used internally by Polaris, automatically generated when record is created in Polaris</td>
<td>N</td>
</tr>
<tr>
<td>SMS Enabled</td>
<td>Bit</td>
<td>n/a</td>
<td>1 = This patron wants text message notification</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0 = This patron does not want text message notification</td>
<td></td>
</tr>
<tr>
<td>Column</td>
<td>Data Type</td>
<td>Max Data Length</td>
<td>Valid Codes/Format</td>
<td>Data required?</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>eReceipt Option ID</td>
<td>Integer</td>
<td></td>
<td>2 = e-mail</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>8 = text message</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>100 = both</td>
<td></td>
</tr>
<tr>
<td>Txt Phone Number</td>
<td>Integer</td>
<td>n/a</td>
<td>Indicates which Phone number (1, 2, 3) should be used for text messages.</td>
<td>N</td>
</tr>
<tr>
<td>Exclude from almost overdue/auto-renew</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = This patron may not be sent almost overdue or auto-renew notifications</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0 = This patron may be sent almost overdue or auto-renew notifications</td>
<td></td>
</tr>
<tr>
<td>Exclude from patron record expiration</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = This patron may not be sent patron record expiration notices</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0 = This patron may be sent patron record expiration notices</td>
<td></td>
</tr>
<tr>
<td>Exclude from inactive patron</td>
<td>Integer</td>
<td>n/a</td>
<td>1 = This patron may not be sent inactive patron notices</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0 = This patron may be sent inactive patron notices</td>
<td></td>
</tr>
</tbody>
</table>
Including Both School and Home Addresses

If you want to include both school and home addresses for each student, repeat the following block of address information for each address, using ~School or ~Home as the Free Text Address Label:

Free Text Address Label
Address Type
Street One
Street Two
City
State
Postal Code
Zip Plus Four
County
Country ID
Uploading Student Data to Polaris

You upload the .TRN file into Polaris using the Polaris staff client. This is the same process you use when you register new patrons offline and then upload the offline file of new patron registrations to Polaris.

**Note:**
It is recommended that you test your exported patron file and practice loading it into Polaris before you do the actual production load.

To upload your TRN file to the Polaris database using the online Polaris staff client:

**Note:**
Polaris Hosted users should be sure to share the disk drives on the workstation in Remote Desktop. In the Remote Desktop Connection dialog box, select the Polaris terminal server and click **Options**. On the Local Resources tabbed page, select (check) **Disk Drives**. See “Managing Offline Circulation” in Polaris staff client Help for details.

1. Copy the TRN file to **Local Drive:\ProgramData\Polaris\version\OfflineTransaction** (default location) on the Polaris staff client workstation.

**Notes:**
Administrators can specify the filepath for offline transaction files on the workstation during staff client installation. If the filepath differs from the default location, copy the TRN file to the location specified during installation.

The filepath for Windows XP workstations is **Local Drive:\Program Files\Polaris\version\offline\polaris**

2. Log on to the Polaris staff client and select **Circulation, Bookmobile** from the Polaris Shortcut Bar.

**Tip:**
Click this button on the Shortcut Bar to display the Bookmobile workform.

The Bookmobile workform appears. The list displays the transaction files available on the local drive.
3. To view the file before uploading it, follow these steps:
   a. Select the TRN file that you want to view in the **Transaction files to be uploaded** list.
   b. Click **View File**.
      The View Transaction file dialog box displays the files.
   c. When you are finished viewing the files, click **Close** on the dialog box.

4. To set error handling during upload, follow these steps:
   a. Click **Upload File**.
      The Error Stop Option dialog box appears.
   b. Choose one of the following options, and click **OK**.
      - Click **stop on errors** if you want the file upload process to stop for any file in which Polaris finds an error. When errors are found, a message indicates why the file is not being uploaded.
      - Click **continue and get error report in the end** if you want Polaris to complete the file upload process and then compile an error report.

5. Click **Upload File** to upload the selected file.
   The file is transferred to the **Transaction files already uploaded** list with a .log extension. (To view a log file, select the file in the **Transaction files already uploaded** list, and click **View report**.)

**Related Information**
Delete a transaction report - In the Bookmobile workform, select the log file in the **Transaction files already uploaded** list, and click **Delete report**.