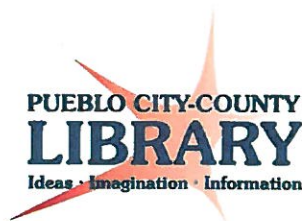


Update about PCCLD's Collections Process *with* Unique Management Services (UMS)

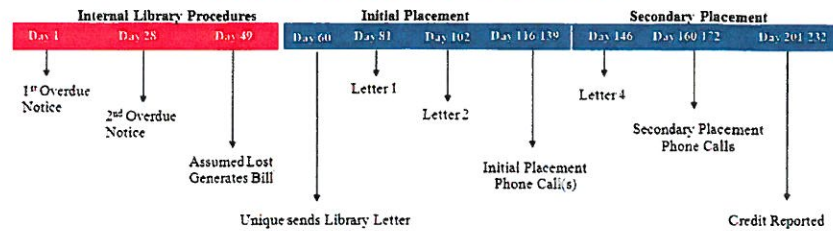


Philosophy of the Collections Process

- PCCLD's Key Results include: Circulation & Visits
- WHAT?!? The library sends people (children and adults) to collections?
- How does it affect our credit?
- The "Gentle Nudge"
- The goal of this process is *Material Recovery and Account Management...not Customer Punishment*



Collections Process

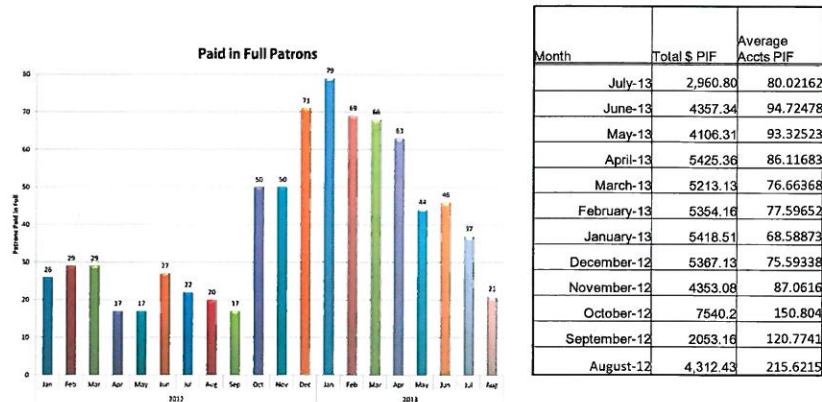


- The Gentle Nudge process
- \$9.45/Customer
- Customer charges and Collections status
- Credit Reporting (adults only)
- UMS Updates
- UMS and PCCLD Communication
- Confidential

October 2012 Change

- Previous to October 2012
 - \$50 or more in unreturned materials (balances are harder to manage)
 - 2 week time
- October 2012-Present
 - \$25 or more in unreturned materials (balances are easier to manage)
 - 2 week time

UMS Progress



UMS Progress – more info

Month	Accounts Referred	Accounts Paid in Full	Total \$ PIF Cash + Materials	Cash Received	Material Received	Dollar Amt Cancelled	Total Recovered
July-13	185	37	2960.80	1265.33	5115.55	1107.00	7507.88
June-13	254	46	4357.34	1544.25	4308.72	1425.89	7278.86
May-13	143	44	4106.31	1763.59	5175.94	1898.33	8937.56
April-13	188	63	5425.36	2556.46	4116.41	1603.84	8276.71
March-13	106	68	5213.13	3164.68	4530.24	1550.6	9245.52
February-13	196	68	5354.16	5353.91	5207.34	1699.07	12260.32
January-13	232	78	5418.51	3450.45	5899.6	1617.2	10967.25
December-12	139	71	5367.13	2970.33	5452.29	1667.68	10090.3
November-12	152	50	4353.08	2442.75	5304.23	1751.64	9498.62
October-12	2042	50	7540.2	6517.14	2841.96	997.33	10356.43
September-12	55	17	2053.16	396.08	2371.83	784.89	3552.6
August-12	64	20	4,312.43	1584.77	4258.53	2014.09	7857.39

Return on Investment

- December 2011-September 2012
(10 months)
 - 723 account referred to UMS – cost is approximately \$6,832.35
 - \$8,477.80 cash recovered
- October 2012*-Present (10 months)
 - 3640 accounts referred to UMS – cost is approximately \$34,398.00
 - \$31,048.90 cash recovered



*In October 2012 we referred 2,042 active accounts to UMS retroactively - the current average per month is 176

Future of UMS Activity

- Review of Library Letter (4th step in timeline), 50-cents charge.
 - Eliminating this step could save approximately \$85/month
- UMS Recommends Adding Fines to the \$25 minimum
 - UMS Business Model guarantees better ROI
 - Customers with Lost and Overdue charges \$25 and over: 11,385 customer
- UMS Recommends Small Balances of \$10
 - A service offered by UMS – a trend
 - Customers with Lost charges \$10-\$24.99: 6,109
 - Customers with Lost and Overdue charges \$10-24.99: 28,232

Questions ?

Thank you for your time! I am happy to provide any further information that you would like to see.

Donations for Three PCCLD New Branch Libraries		
August 16, 2013		
	Pledge	Received
Employees	\$19,476.00	\$5,224.00
Boards of Directors	\$16,755.00	\$14,351.00
Individuals	\$94,751.65	\$47,226.65
Businesses	\$116,875.03	\$106,207.12
Foundations	\$235,000.00	\$171,000.00
Government	\$153,679.00	\$54,745.00
Chamberlain Fund	\$45,000.00	\$39,500.00
PCCLD Fundraiser (2011 Black Tie Ball)	\$16,820.00	\$14,320.00
Total	\$698,356.68	\$452,573.77
Percent of \$ Pledged Received		64.81%
Goal	\$970,315.00	
Progress on Goal		72.00%
Balance to Fundraise	\$271,958.32	

AN ELECTED OFFICIAL'S GUIDE

THE NEW PENSION ACCOUNTING

Stephen J. Gauthier



Government Finance Officers Association

ANNUAL PLANNING RETREAT 2014

“TOP IDEAS”

- **Technical Services will develop ideal collections** 27
 - Based on statistics provided by Collection HQ (improved circulation and library visits)
- **Evaluate policies** 20
 - Policies that support increased circulation, staff efficiencies, meeting room use.
 - Decrease barriers to usage
 - Sub-budget for leaner staffing
 - Meeting room space available after hours where possible Pueblo West and new libraries (to increase gate count)
- **Look for unusual collections** 20
 - Expanding the PASS Program: More Zoo, Ice Arena, Children’s Museum
 - Human – Checkout a Conversation
 - Tools
 - Cake Pans
 - Items related to programs
- **Customer Service Training** 19
 - OZ Principles
 - Self accountability
 - Training in core results
 - Define, implement and support all aspects of Facilitated Customer Service (impacts Circulation & Visits)
 - Staff training and accountability measures
 - Merchandising and access to materials
 - Call Center support and ongoing evaluation
 - Define it and train on it.
 - Provide service measures that support it
 - Improve accountability
 - Training initiatives – Improve level of service
 - Customer Service (finding balance between for-profit and nonprofit models)
 - Accountability – (Desire to work toward key results)
 - Volunteers
 - Reference interviews
 - Measureability: All shelf space is full and items are faced-out
 - Cross training throughout the district (everyone becomes invested)
 - Training staff in promoting services and customer service
 - Train on a particular incentive for example overdrive and online resources
 - Offer incentive and a promotional period for each resource (staff)

- Would offer training on each resource prior to promoting
 - Measure results by tracking statistics on a weekly basis through technological means
- Cross Training 18
- Outreach – Partnerships 16
 - Outreach (outside walls) continue to support existing partnerships and develop new ones. *Impacts Circ, Library Visits & program attendance*
 - Continue existing partnerships
 - Each department/location is responsible for developing one new partnership and interacting/co-sponsoring an event with them quarterly.
 - Identify a staff liaison who is responsible for communication and representing the library at off-site events.
 - Provide resources to support staffing and technology for outreach efforts (volunteer corps, teens, workforce, and extra hours for part-time staff, “Vacation Budget,” power supply for download stations, devices for checkout...resources for “travelling show”
 - Partnership Database and Email List. Create a database and email list combining and centralizing partnerships throughout the departments – the email list will help spread the word about programs that partnership representatives
 - ESL
- Evaluate options to streamline cash management 15
 - Evaluate viability of implementing smart card technology for someone who doesn’t have a library card (saves time and money from man power and supplies to manage circ and visits and encourage people to get library cards)
 - Vending equipment for sale items such as ear buds, jump drives, and bags (collaborate with merchants for free bags as an opportunity to support our local businesses)
 - More e-commerce to pay vendors (pay vendors and program providers electronically for programming to save time and money, this will allow us to pay them more efficiently, and to provide refunds to patrons-Programming impacted 1%, circ impacted 2% items back on shelf)
- Upgrade shelving 15