

Attachment 4

Public Libraries' Opportunities Analysis

A Study of Three Public Libraries
For
Region 2000 Local Government Council

By
Dominion Library Associates, LLC.

May 15, 2012

Introduction:

Dominion Library Associates, LLC was employed by Region 2000 Local Government Council to provide the following services in completion of the Public Libraries' Opportunities Analysis:

- An examination of the fiscal resources available at participating library units. This examination will include:
 - a. Study of current funding for participating library units
 - b. Discussions with library directors and local government administrators on funding projections for the next five years.
 - c. Study of budgets for participating library units.

- An examination of the programs, services, and information technology support in place at the participating library units.
 - a. Study of current programs, services, and information technology support in place at the participating library units.
 - b. Level of public use to include systems totals, borrower, circulation, and other appropriate measures.
 - c. Discussions with library directors and local government administrators on program, service, and information technology needs and expectations.
 - d. Recommendations on program, service, and information technology support for cooperative service opportunities among two or more libraries, identifying the potential for cost savings.

- An examination of the commitment to proceed with collaborative service improvements. This examination will include:
 - a. Meeting individually with each public library director.
 - b. Meeting individually with the local government administrator in each government.
 - c. Meeting with Region 2000 staff involved in the project.
 - d. Meeting with Boards of Trustees/support organizations.
 - e. Feasibility of additional funding for cooperative service improvements.
 - f. Other meetings as determined necessary by Dominion Library Associates, LLC.

- A report to Region 2000
A written report will be presented to Region 2000 at the close of the project. While a report on best practices will not be a part of this report, references to best practices as found in the literature and the consultant's experience will be a part of any recommendations made in the report. The report will address findings in areas 1 – 3 above. It will indicate whether there is merit in pursuing further steps towards a greater level of cooperation and service improvements, including the possibility of development of a larger unit of service for the libraries involved in the study. If recommendations are made for development of new levels of cooperation or service unit consolidation, the recommendations will address the following areas:

- Administration
- Operations
- Tasks
- Schedule
- Costs

Up to four presentations of the final report and its recommendations will be provided to Region 2000.

The consultant for this project was John A. Moorman Ph.D. owner of Dominion Library Associates, LLC. Dr. Moorman has been a public library director since 1975 and a consultant since 1982.

This project is an outgrowth of the discussions of the Region 2000 Librarian's Working Group which began in 2010. Results of these discussions are found in the *Region 2000 Libraries' Discussion Initial Opportunities Discussion Document*, Revised April 2011. This document was very helpful to the consultant as background for this study.

Since beginning the project the consultant has gathered and examined data from the participating public libraries in the following areas:

- Budgets from both libraries and local government
- Staffing including personnel costs
- Programs
- Services
- Policies
- Integrated Library Systems and technology in use
- Library use data

The consultant has had interviews with the following individuals using questions found in the appendix as the basis for discussions:

- Ernest Bender – Campbell County Public Library Board Chair
- Libby Berry – Bedford Public Library System Board President
- Peggy Bias – Bedford Public Library System Director
- Nan Carmack – Campbell County Public Library System Director
- Lynn Dodge – Lynchburg Public Library Director
- Mary Guthrow – Friends of Lynchburg Public Library
- Michelle Jackson – Friends of Lynchburg Public Library
- Charles Kolakowski – Bedford City Manager
- David Lurrell – Campbell County Administrator
- Kimball Payne – Lynchburg City Manager
- Frank Rogers – Bedford County Acting County Administrator
- Bonnie Svrcek – Lynchburg Deputy City Manager
- Bob White – Region 2000

The consultant completed the interviews on Friday, February 24, 2012. Data gathering continued through the preparation of this report.

Data Presentation and Analysis:

Bedford County, Campbell County and the City of Lynchburg occupy the heart of Region 2000. According to population statistics released by the Weldon Cooper Center for Public Policy of the University of Virginia population for these entities as of July 1, 2011 is as follows:

Bedford County – 69,379
Bedford City - 6,222
Campbell County – 54,759
City of Lynchburg – 76,448

Each of the Libraries in this study has multiple locations.

Bedford Public Library System	6 locations
Campbell County Public Library	4 locations
Lynchburg Public Library	2 locations

A. General Characteristics and Population Data

There are three distinct but overlapping entities involved in this study.

Bedford County is the largest in area with population clusters around Bedford City, the western edge of Lynchburg, and the Timberlake area of Campbell County. There are small towns some with branch library locations scattered throughout the county. Otherwise it is a rural hilly/mountainous area where transportation is circuitous rather than direct.

Campbell County is a smaller version of Bedford County with population centers in Rustburg, Timberlake, Altavista, New London, and Brookneal. Much of the county is rural with the same topography as Bedford County.

The City of Lynchburg is an urban city whose recent growth is the result of the expansion of Liberty University and its student population. As an urban city it has the problems found in any long settled urban city in the country. Lynchburg is the major shopping, recreation, higher education and health center for the region.

The following chart gives basic population characteristics of the three areas. The data is from the 2010 U.S. Census quick facts file.

**Population
Statistics
2010**

<u>Item</u>	<u>Bedford County</u>	<u>Campbell County</u>	<u>Lynchburg</u>	<u>Bedford City</u>
Population	68,676	54,842	75,568	6,222
Persons Under 5 yrs	4.9%	5.5%	6.1%	6.4%
Persons Under 18	22.3%	22.0%	19.6%	20.5%
Persons 65 and over	16.2%	15.8%	14.0%	21.5%
Female	50.4%	51.3%	53.1%	53.8%
White Persons	91.4%	82.1%	64.4%	76.4%
Black Persons	5.7%	14.2%	29.3%	20.2%
High School Graduates	85.0%	82.6%	83.1%	84.5%
Bachelors Degree or higher	24.2%	16.3%	28.3%	20.8%
Homeownership rate	84.5%	75.7%	56.3%	66.6%
Median Household Income	\$54,110	\$43,478	\$37,058	\$32,262
Persons Below Poverty Level	8.7%	12.2%	22.7%	16.5%
Retail Sales Per Capita (2007)	\$7,029	\$9,742	\$23,171	\$19,848

These statistics indicate that there are a higher percentage of minority individuals in the City of Lynchburg than in the other jurisdictions. The difference between Bedford County's Median Household income of \$54,110 and the City of Bedford's \$32,262 is \$21,848. This and other statistics presented above indicate the differences often found within regional library systems. Lynchburg's 28.3% of residents having a Bachelor's degree or higher is higher than the other jurisdictions. This may be due to Lynchburg being the home to Liberty University, Lynchburg College and Randolph College. The rate of persons below poverty level is substantially higher in Lynchburg. However, this figure must take into consideration the close to 16,000 students at these institutions who are a part of Lynchburg's census data. Most of these students would fit into the persons below poverty level category. The retail sales per capita statistics indicates the role that Lynchburg plays in the economic life of the surrounding area.

B. Financial

It became apparent early in the project that governments in Bedford County, City of Bedford, Campbell County and the City of Lynchburg were funding their public libraries at a level that was less than recent years due to the recession that hit during the 2007 – 2008 period. In speaking with administrators in Bedford County, Campbell County and the City of Lynchburg there was a uniform agreement that there was not more funding available for public library

service at this time. There was also strong indication that library funding would not increase substantially if at all in the next few years. In its FY13 budget the City of Lynchburg is proposing further cuts to the Library's budget. The following chart indicates recent funding levels.

Libraries - Total Income	2007	2008	2009	2010	2011
Bedford Public Library System	\$1,690,517	\$1,801,536	\$1,873,371	\$1,846,025	\$1,690,137
Campbell County Public Library	\$978,365	\$980,733	\$945,341	\$990,334	\$893,524
Lynchburg Public Library	\$2,040,869	\$2,226,078	\$2,328,654	\$2,298,284	\$2,222,737

The above figures are from the Bibliostat Report filed with the Library of Virginia by each library. They reflect the reported total operating revenue for the fiscal year indicated. From this chart it is evident that each library has received funding cuts in FY10 and FY11. Campbell County Public Library received a 9.8% cut in FY11 the most severe of the three libraries during this period.

Another aspect of local financial support is the percentage of the local government's general fund that is spent on public library services. Standards documents and the consultant's experience indicate that a minimum 1% of localities general fund should be spent on public libraries. The percentage for each of the public libraries in the study is as follows:

Library	FY12	Average FY07 – FY12
Bedford Public Library System		
Bedford County	1.52%	1.54%
Bedford City	1.00%	1.04%
Campbell County Public Library	1.50%	1.54%
Lynchburg Public Library	.98%	1.01%

These statistics indicate all public libraries in this study are receiving the minimum recommended 1% of local government funding based on a six year average. It is important to note that the Lynchburg Public Library has fallen below the 1% for FY12 and their long term average is below that of Bedford Public Library System and the Campbell County Public Library.

Resource allocation is an important part of any library's operation. Essential to the operation of any public library is a collection of materials that meets the needs of its user community. The following chart indicates project library collection expenditures.

Libraries Collections - 2011	Collection Expenditures Per Capita	Total Collection Expenditures
Bedford Public Library System	\$2.20	\$152,809
Campbell County Public Library	\$2.21	\$121,000
Lynchburg Public Library	\$2.08	\$158,649

Combining this chart with the previous chart on library funding indicates that in 2011 project libraries were spending between 7.1% (Lynchburg) and 13.5% (Campbell County) of their budget on library materials. Bedford County was at 9.0%. Only Campbell County met the accepted desired minimum of 12% of budget being spent on library collections. This 12% figure is a standard found in many state library standards documents and is widely accepted in the library community.

C. Use Indicators

The chart below indicates the number of items added and withdrawn from the library's collections in 2011. It is important that the collection be weeded (indicated by the books withdrawn figure) on a regular basis or the collection will become stale and contain out of date materials.

Libraries Holdings - 2011	Books Added	Books Withdrawn	Total Holdings
Bedford Public Library System	11,865	24,087	206,818
Campbell County Public Library	9,483	6,936	231,017
Lynchburg Public Library	11,172	7,441	155,777

These figures indicate that on a per capita basis Bedford Public Library System has 2.98 items per capita, Campbell County Public Library has 4.21 items per capita and Lynchburg Public Library has 2.04 items per capita. While this figure indicates the number of items available for each resident, it does not indicate the quality of the collection as a whole. The consultant is impressed with the effort of the Bedford Public Library System in removing items no longer of value to library users due to condition, outdated information, or lack of use.

The next several charts will indicate library door count, the number of registered borrowers and the materials circulation for each library. It is important to note that registered borrowers may include individuals living outside of the jurisdictional area. Bedford Public Library System charges non-residents a reciprocal fee based on fees charged by the user's area of residence. Campbell County Public Library has no charge for the issuance of borrower's cards to individuals living outside of their service area. Lynchburg Public Library charges \$25.00 per

year for non-resident borrower's cards. Exclusions to this policy include residents of Amherst County and students at Central Virginia Community College. Students living on campus at any of the Lynchburg colleges are not eligible for Lynchburg Public Library borrower's cards unless they are registered to vote in the City of Lynchburg.

Libraries - Door Count	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Bedford Public Library System	310,935	319,955	332,707	351,395	333,274
Campbell County Public Library	188,364	208,999	219,840	233,606	231,091
Lynchburg Public Library	316,500	333,465	328,062	315,616	300,000

These statistics indicate that the door count since 2007 has increased at both the Bedford Public Library System and Campbell County Public Library although 2011 door counts were less than 2010 figures. Lynchburg Public Library's door count has decreased since 2008.

Libraries - Card Holders	2007	2008	2009	2010	2011
Bedford Public Library System	40,689	35,736	37,851	37,452	33,140
Campbell County Public Library	16,181	17,563	20,714	22,545	26,603
Lynchburg Public Library	28,500	28,273	29,286	30,158	29,824

These statistics show borrower's cards over a five year span beginning in FY2007. Despite having a smaller population base than Lynchburg, Bedford Public Library System has the most cardholders. When comparing cardholder statistics it is necessary to know how often the cardholder file is purged of inactive users. Both Bedford Public Library System and Campbell County use a three year purging schedule. Lynchburg Public Library uses a four year purging schedule. This means that any time the cardholder list contains individuals who have used the library within that time period. As a percentage of population 47.8% of Bedford County residents have a library card, 48.6% of Campbell County residents have a library card and 39% of Lynchburg residents have a library card.

Libraries - Circulation	2007	2008	2009	2010	2011
Bedford Public Library System	478,235	553,846	534,752	514,721	517,819
Campbell County Public Library	245,487	248,132	253,816	260,775	336,307
Lynchburg Public Library	540,245	563,687	566,328	531,210	511,596

Circulation per capita for FY 2011 indicates Bedford at 7.46, Campbell at 6.14 and Lynchburg at 6.69. None of these figures are high for public libraries serving similar populations.

D. Services

All three libraries provide the core services to their users. These services are:

- Materials Checkout and Return
- Reference Services including Readers Advisory
- Access to online databases
- Public Access Internet
- Wireless Internet Access
- Youth Services including Summer Reading Program
- Interlibrary Loan
- Public Meeting Rooms
- Copy Machines

All three libraries have Friends Organizations which provide financial and volunteer assistance in programs and services.

Additional services found in one or more of the libraries include:

- Assistance with Technical gadgets on a one-to-one basis
- Notary Service
- Fax Service
- Scanning Service
- Computer tutoring
- Public Art Gallery Space
- Courier Services
- Reciprocal Borrowing with other libraries

The consultant found that the service approach and emphasis varied from library to library. This is to be expected.

E. Programs

The three libraries provide a wide variety of programming. All libraries conduct story-times for ages ranging from babies up through the elementary years in the library and community settings. As the list below indicates library staff members exhibit their creativity and expertise on a daily basis in interacting with their communities:

- Adult Literacy Tutors
- Reading to Therapy Dogs (Paws to Read)
- Book Groups
- Fiber Arts Groups

- Winter and Summer Reading for children and adults
- Film series for youth and adults
- Computer literacy classes
- Technology classes
- Career assistance
- Lapsits for infants
- Community wide reading programs
- Family Craft Programs
- Age geared story-times

The consultant is sure that the above list is not all encompassing. It is amazing that these libraries with limited funding and staffing can provide this level and excellence in programming to their user communities.

The following chart indicates the number of programs held in the libraries from 2007 – 2011.

Libraries - Programs	2007	2008	2009	2010	2011
Bedford Public Library System	1,256	1,186	1,336	1,731	1,631
Campbell County Public Library	216	238	302	270	401
Lynchburg Public Library	460	330	316	362	388

How the libraries record programs may vary from library to library. In analyzing these figures it must be remembered that Bedford Public Library system has six locations, Campbell County Public Library has four locations and Lynchburg Public Library has two locations. Lynchburg Public Library’s branch is not a programming location.

F. Technology

Technology includes both the software and hardware used in library operations and in serving the public. In 2011 libraries in this study had the following number of public access terminals:

Bedford Public Library System	- 49
Campbell County Public Library	- 34
Lynchburg Public Library	- 29

The libraries had the following number of Work Stations for staff use:

Bedford Public Library System	- 48
Campbell County Public Library	- 22
Lynchburg Public Library	- 28

Software used in staff and public access computers varies from library to library but include:

- Microsoft 2007
- Microsoft 2010
- Envisionware PC Management System
- Cassie Software Management System
- MS Office
- Firefox
- Internet Explorer 8/9
- A variety of programs installed on an as-needed basis such as Gimp, iTunes and Dreamweaver.
- Computer filtering software

Bedford Public Library System has an individual dedicated to the provision of IT services for the library. Both Campbell County Public Library and Lynchburg Public Library depend upon the IT Departments of their government for such service.

One of the most important aspects of the provision of public library service to the community is access to the library's collection. This access is provided through an automated network. This network enables the user to search the library's catalog and perform functions related to that search. Related functions include reserving and renewing materials, paying fines and fees and accessing ancillary services such as downloadable e-books, audiobooks and music. Staff may use the system for generating reports and the ordering and processing of materials.

Two automated network systems are used in the libraries in this study. Bedford Public Library System and the Campbell County Public Library recently merged their catalogs. The following is a description of the system from Peggy Bias, Bedford County Public Library System Director:

Bedford Public Library System and the Campbell County Public Library have recently (October 2011) merged catalogs. The merge resulted in a cost savings for each library and appears to be successful in that patrons are making use of the expanded collection. The physical servers that make up the ILS are housed at Bedford Central Library. CCPLS staff connect to the circulation and cataloging software via a remote desktop session to a terminal server also housed at Bedford Central. The TLC reports module is accessed over the Internet. BPLS is responsible for initiating trouble tickets with the ILS vendor and configuring the ILS settings. We are exploring an alternate access method that would allow CCPLS staff to use a web based (Internet) connection to access the circulation software, thereby minimizing their dependence on the terminal server.

Modules included in the TLC Library Solutions 4.2 (The Library Corporation) system are:

- LS2 Pac/Kids/Staff/Mobile
- LS2 Circulation software
- LS2 Cataloging software
- Reports Manager software

Other modules are available and might be a part of any unified catalog system discussed later in the report.

The Lynchburg Public Library along with the Amherst Public Library participates in LION, the Lynchburg Information On-Line Network. Below is a description of LION by Lynn Dodge, Lynchburg Public Library Director.

In 1991, a consortium of 4 libraries, Lynchburg College, Randolph-Macon Woman's College, Sweet Briar College, and Lynchburg Public, was established to form LION, the Lynchburg Information On-Line Network, using the DYNIX HORIZON software. In 1996, the 10,000- item collection of the Jones Memorial Library (a privately funded but open to the public, genealogical library) was added to Lynchburg's database and a few years later the much smaller book holdings of the Lynchburg Museum System were added.

In 2005, Lynchburg College withdrew from LION and Amherst County Public Library joined the consortium. At that time, the software was upgraded to SIRSI/DYNIX's Horizon platform. The contract was renewed for another 5 years in 2010. This has been a very successful and economical way to provide a high-quality service. Lynchburg can withdraw from LION by giving our partners 12 months notice.

The central server is located in Lynchburg's main library's computer room. Lynchburg IT provides a high-speed Internet connection at no cost. A full-time Randolph College librarian works part-time as our system administrator and a Sweet Briar librarian backs her up; both are paid by the hour. Lynchburg and Amherst librarians assist them by being in a weekly rotation to come in and do the daily back-up; they are not paid additionally for this.

The partnership with Amherst has been wildly successful. We do not have a joint library card, but we provide our cards free to each other's residents. A courier runs daily (M-F) among the public libraries' 4 locations and during the academic year also stops at each college, including Lynchburg College, which now pays a fee to be included. Public library items can be returned to any public library location and are checked in immediately.

Modules used in the current Sirsi/Dynix Horizon platform include:

- Cataloging
- Circulation
- HIP (Public Catalog)
- Kid's HIP
- Enriched content (for HIP)
- Acquisitions
- WebReporter
- Telecirc
- Self-serve checkout (with a SIP license)
- PC reservation (with a SIP license)

Hardware related licenses include:

- SQL server
- Red Hat Linux

Staffing

As the following charts indicate staffing levels vary between the three libraries.

Libraries	2007	2008	2009	2010	2011
Staff - FTE					
Bedford Public Library System	34.8	47.6	46.4	44	44
Campbell County Public Library	19.9	17.5	20	19	19
Lynchburg Public Library	31.89	32.39	31.89	32.95	32.96

The number of staff with graduate degrees in Library Science is as follows:

Bedford Public Library System	- 6
Campbell County Public Library	- 5
Lynchburg Public Library	- 9

The consultant has examined both job descriptions and salary information for the three libraries. They vary substantially in job titles, work descriptions and pay levels. A chart of the Full-Time Personnel salary ranges is in the appendix.

Observations:

During this study the consultant interviewed the individuals listed on page three, had detailed discussions with Peggy Bias, Nan Carmack and Lynn Dodge as they gave of their time in giving tours of library locations and met on several occasions with Bob White of Region 2000 Local Government Council. These interviews and discussions were extremely helpful in giving the consultant a background to the communities served, library operations and relationships among individuals involved in providing library service to the communities under study.

Without exception, individuals contacted were friendly, open, and willing to give the consultant their views on the current state of library service and possibilities for further cooperation among the three libraries in this study.

Those interviewed in Bedford and Campbell Counties spoke of the interconnections between their residents and the City of Lynchburg. Many individuals, who live in these counties work in the City of Lynchburg, see Lynchburg as the place to go to shop, to have recreation, and to take care of their health.

Government officials of the three entities stressed that there are many cooperative ventures that they participate in including:

- Solid Waste
- Water and Sewer
- Radio
- Juvenile Detention
- Metropolitan Planning Organization
- Regional Jail
- Local Government Council

Each of the government officials was open to further library cooperation up to and including the merger of the three libraries. It was mentioned that Boards of Supervisors and City Councils had not discussed further cooperation in any detail and that any effort toward further cooperation must meet the following criteria:

- How will it benefit each location?
- How is it sustainable?
- How will it provide additional value to residents of each jurisdiction?

In meeting with the Board of Trustee Chairs of Bedford Public Library System and The Campbell County Public Library, the consultant observed strong support and respect for their library systems. Each individual indicated that their libraries were benefiting from strong leadership and a staff that is providing quality service to their communities. Strengths mentioned for the Bedford Public Library System included advances in technology, outreach to other libraries, the merged catalog system with Campbell County Public Library, beautiful buildings with a café in each building, and the recent Overdrive agreement with area public libraries. Campbell County Public Library's strengths included board members that are supportive and proactive, and a system that meets the needs of the community. Weaknesses mentioned for Bedford County included barebones staff, reduced hours and lack of recent staff wage increases. Campbell County's major weakness was a lack of building space for a growing community.

As there is no Board of Trustees for the Lynchburg Public Library the consultant met with the President and Vice-President of Friends of Lynchburg Public Library and Lynn Dodge, Lynchburg Public Library Director for a dinner meeting. At that meeting the strengths indicated for the Lynchburg Public Library were the IT support received from the City of Lynchburg, the library's strong volunteer core, and the location of the main library. Weaknesses indicated were a lack of space, lack of visibility in the community, security issues with the main library and fiscal challenges from both the state and city.

The following are the views of representatives of each entity's board or advisory organization concerning further cooperation/consolidation.

Libby Berry, Chair of the Board of Trustees of the Bedford Library System mentioned the good relationship already in place with the Campbell County Public Library. She expressed concern about Lynchburg and the non-resident fee that Lynchburg charges out of city users (with the

exception of Amherst Public Library users as mentioned earlier). She indicated that human nature protects its own turf. She mentioned the following questions as part of any further consolidation consideration:

- How many chiefs?
- What control would be lost?
- Personnel issues.

She felt that there was interest in consolidation by the library board.

Ernest Bender, Chair of the Board of Trustees of the Campbell County Public Library also mentioned the good relationship with the Bedford Library System. Concern was expressed with the non-resident fee charged by the Lynchburg Public Library and he indicated a lack of knowledge as to how the Lynchburg Public Library operates. He indicated that support for further consolidation on his board was speculation at best. There are fears that a larger system will not allow the personal interaction with individual communities. He feels that consolidation can be accomplished but its success will depend on the details and its promotion to the community. He had a personal concern that in any further consolidation staff, directors and boards be dealt with fairly.

Mary Guthrow and Michelle Jackson, officers of Friends of the Lynchburg Public Library emphasized the centrality of the Lynchburg Public Library to their view of public library service. They indicated that they were not sure that individuals who live in the City know what goes on in the counties, that the adjoining counties were so far away, and memories of the resentment by surrounding communities of the 1974 annexation by Lynchburg of surrounding county areas was still strong. Both individuals indicated skepticism about future cooperative ventures. They asked the consultant;” What are you going to accomplish by such efforts and what is in it for the Lynchburg Public Library?” They felt that the City of Lynchburg has different demographics, needs and challenges and that a merger between Amherst Public Library and Lynchburg would be easier to accept.

In the interview with Peggy Bias, Director of the Bedford Public Library System, she indicated that strengths of the Bedford Public Library System included a professional staff, strong local government support and a community that is supportive of the services provided to them by the Library. She mentioned the bond issues passed by both Bedford County and Bedford City to build branches and expand the main library as examples of this support. Weaknesses included the unpredictability of state funding and the lack of administrative staff. The upcoming reversion to town status of the City of Bedford will mean the end of Bedford Public Library System as a regional library. She indicated that relationships in the community are positive to surrounding communities and that Bedford residents go to Lynchburg for shopping, doctors etc.

Nan Carmack, Director of the Campbell County Public Library system indicated that her library’s strengths included a dedicated staff called to public library service, their literacy program, the high value placed on the library by the community, support from county government and the ability to have input into county government through weekly meetings of department heads. A major weakness was a library foundation that is struggling to establish its

identity. She indicated that Lynchburg is the primary employer of Campbell County residents. She expressed concern with the non-resident fee charged by the Lynchburg Public Library. In touring the library system with Nan the consultant agreed with her assessment of the Timberlake Branch Library which is located in a populated area near boundaries with both Bedford County and the City of Lynchburg. This library is experiencing heavy use and needs expansion.

Lynn Dodge, Director of the Lynchburg Public Library indicated that her library's strengths included a long lived staff, the technical support provided by the City of Lynchburg, membership in LION, the Friends of Library organization, and outstanding children's collection with excellent children's programming. Weaknesses include a long lived staff – when eligible staff retires much institutional knowledge will be lost, aging volunteer corps – with difficulty in replacing, and being a part of the current economic climate which includes strong fiscal constraints on the Library. She is pleased to be a part of the City and feels that the surrounding counties are not as well organized as the City of Lynchburg. The Library is the beneficiary of a \$500,000 HVAC replacement this year and a \$150,000 gift from a local church that will expand the children's area. Lynn expressed concern about policies and organization of any merged system but indicated that her employees are flexible and points to the recent Overdrive project which included Amherst, Bedford, Campbell, Appomattox, Lynchburg and Pittsylvania Libraries as an example of library cooperation.

Recommendations:

In discussions with Region 2000 Local Government Staff, and in the process of project definition and contract preparation the concept “Best Practices” was mentioned. A “Best Practice” is generally defined as a method or technique that has consistently shown results superior to those achieved with other means and that is used as a benchmark. The consultant has read considerably in library and other literature on the subject and observes that for libraries standard documents are the closest indicators of the Best Practices concept. These documents vary from state to state and are not applicable to the project at hand. The consultant does not feel that there can be a recommended practice that is best in all cases. For this report the consultant will base recommendations on the concept that what is being sought is the best possible library service for all users provided in a fiscally responsible manner.

The consultant recommends that efforts towards library consolidation continue. In these times of fiscal constraints and changing governmental expectations it is essential that options for the provision of larger units of public library service be thoroughly examined. This process has been begun by Region 2000 Local Government Council and this report urges the continuance of these efforts and presents recommendations to guide and aid this process.

Before any further discussions concerning further cooperation are held **it is strongly recommended** that the Lynchburg Public Library take the necessary steps to remove the \$25 non-resident user fee for all residents of Bedford County and Campbell County. According to Lynn Dodge's comments of March 27, 2012 there were 602 Bedford County residents with a Lynchburg card and 984 Campbell County residents with a Lynchburg card. Total income from all non-resident fees for FY2011 was \$8,025.00. The figure for the number of Bedford and Campbell County residents included many individuals in the same household. The \$25 buys a

family card and then individuals in the family are issued individual cards. The cost of collecting this fee, the small number of users involved, and the bad will that it extends to residents of adjoining areas many of whom work in the City of Lynchburg are other reasons for its removal. This fee removal has already been extended to residents of Amherst County because of their library's participation in LION and extending it to residents of the participating libraries in this project would be an expression of good will on the behalf of the Lynchburg Public Library and remove a service contention between the libraries in this study. There are 1,255 Lynchburg residents registered in the Bedford Public Library System where there is a reciprocal fee charged due to the policy of the City of Lynchburg. Of these 1,255 residents 1,214 are registered at the Forest Library which is the closest branch to the City of Lynchburg. There are 1,320 Lynchburg residents registered in the Campbell County Public Library where there is also no charge for out of county residents. During the period April 1, 2011 through March 31, 2012, Lynchburg residents checked-out/renewed 16,334 items from the Campbell County Public Library. During the same period 32,456 items were checked out at Bedford County Public Library System by non- resident card holders. Of that number 23,405 were checked out by non-residents from its Forest branch which is adjacent to the City of Lynchburg. During the course of this study the consultant has been given by Lynchburg Public Library staff numbers ranging from 8,000 to 17,000 to 23,107 as to the number of items checked out by Amherst Public Library residents from the Lynchburg Public Library during FY11. The consultant is not confident in the reliability of these numbers.

It is recommended that any further branch construction be put on hold by the libraries involved in this study. This action will enable further discussions on cooperation/consolidation to take place. These discussions should enable a new look at library locations and could provide an early opportunity for interlibrary and intergovernmental cooperation. This action could provide the basis for decisions that enhance the use of limited fiscal resources in the development of service locations throughout the region.

Program Sharing:

The consultant observed during the interview and visitation process that each of the libraries had strengths in programming and service provision that could benefit a wider audience. As an example, he was impressed with the traveling bags used by the Bedford Public Library System in the provision of children's programming. Thus, the consultant **recommends that a committee be formed consisting of representatives of the three libraries in this study with Region 2000 Local Government Council assistance to plan further sharing of resources among the participants in this study.** This committee should begin its work no later than July 1, 2012.

The committee should consider the following programs and services as beginning points where cooperation would benefit all library users. As the discussion continues the consultant is sure that other areas will be considered as well.

- A joint summer reading program where staff skills and resources could be shared among the three libraries.
- Expansion of individual library special programs and projects to include all libraries.

- Expansion of Community Wide Reading Programs to include all libraries working with the same book at the same time.
- Working together on Adult Literacy.
- Computer literacy efforts across library boundaries.
- Readers Advisory Services.

A quality resource sharing program in which individuals from all three libraries share their experiences and talents with staff and the public in other locations will not only enrich programming but enable staff to become better acquainted with their counterparts in the other libraries. As a part of this process when an individual library has a job vacancy at professional or high non-professional level, discussions should be held with the other two libraries before a hire is made. Through this process savings might accrue over time as more efficient use is made of specialized personnel.

Automated Network Development:

As indicated earlier in the report the Bedford Public Library System and the Campbell County Public Library share an automation network. The vendor for this system is TLC. The Lynchburg Public Library is a part of the LION automation network. The vendor for this system is Sirsi/Dynix and the platform used is Horizon. Members of LION are Amherst Public Library, Lynchburg Public Library, Randolph College and Sweet Briar College. However, public sharing of holdings on this network is limited to colleges sharing their resources among themselves and public libraries doing likewise. Thus for Lynchburg Public Library users the only advantage of this system is access to the holdings of the Amherst Public Library.

In gathering data for this report the consultant worked with all libraries in the project as well as Lisa Broughman, Technical Services Librarian for Randolph College who is the part-time administrator for the LION Network. Questions were asked about costs for Bedford Public Library System and Campbell County Public Library joining LION and Lynchburg Public Library joining the TLC Network operated by Bedford and Campbell County.

A discussion ensued among the directors of the LION libraries about the feasibility of adding additional members to LION. The result of this discussion is contained in a February 15, 2012 memo from Lisa Broughman from which I quote.

“After much discussion, the directors of the LION libraries concluded that it would not be financially advantageous to add additional member libraries to our consortium...Unfortunately, it’s simply not a cost effective option for us”.

The consultant believes that sharing of resources is an essential hallmark of the 21st century public library. Sharing of resources eliminates the unnecessary duplication of lesser used material, provides the public with availability and access to a wider range of materials and promotes interlibrary communication on materials purchasing as well as other library services.

As the addition of Bedford Public Library System and Campbell County Public Library's holdings to the LION network is not a possibility, the consultant sees three options:

1. Keep the situation the same as it is currently.
2. Consider a new network based upon open source software.
3. Integrating the holdings of the Lynchburg Public Library into the TLC Network operated by Bedford Public Library System and Campbell County Public Library.

Option 1

While option 1 has no initial additional financial cost, it does not improve the current materials access levels for users of the three libraries. It also hinders progress on the cooperative actions recommended above. The current Horizon platform used by LION has a limited life span and Sirsi/Dynix the platform's vendor has made no guarantees for how long they will provide support for this platform. The platform is already aging and is falling behind many other platforms in service provision and ease of use for library customers. Thus, the Lynchburg Public Library will be facing considerable costs in the near future as Horizon is upgraded to another Sirsi/Dynix platform or to a platform of another vendor.

Option 2

Open source systems are a new presence in the library automation scene. Most library automation systems are vendor based. This includes the Horizon platform used by LION and the TLC Library Systems 4.2 platform used by Bedford Public Library System and Campbell County Public Library. In vendor based systems the software is proprietary and is not shared with anyone including those using the platforms. Development and enhancement of the platforms is done in-house. The use of enhancements by participating libraries often comes at additional cost to the libraries involved.

Open source software as its name indicates is software that is shared with the user community at large. Thus open source automation systems are freely available automated systems available for libraries. They can be modified to meet the needs of specific libraries if technical skill and knowledge is available to do the modification.

The Library of Virginia is currently doing a pilot project with eight public libraries in Virginia to convert their holdings to Evergreen the major open source library system available at this time. The purpose of this project is to convert holdings of public libraries which have outgrown their school based automation systems to the Evergreen platform. In talking with Carol Adams who is coordinating this project for the Library of Virginia she emphasized that the project is directed towards libraries in desperate situations with their current automation system. She indicated that if a current automation system vendor is providing good service there is no reason to change to an open source system.

One major impetus to change to an open source automation system is the desire to have more control over its applications and services. However, unless the library is a large one with

dedicated staff for its maintenance and enhancement such control is more an illusion than a reality.

To effectively operate open source library systems libraries using them, particularly those without large and dedicated IT staff, have to contract with companies to provide support for system operations. This is no different from the current arrangement that libraries have with their automation vendor.

The consultant does not recommend the pursuit of any open source library system for any of the libraries in this study.

Option 3

The integration of the Lynchburg Public Library's holdings into the TLC automation network used by the Bedford Public Library System and the Campbell County Public Library is a viable option. While, as indicated below, there are costs involved for Lynchburg Public Library in this option, additional costs up to and possibly exceeding these costs will accrue to the Lynchburg Public Library in the next few years no matter what action they take. Thus, **the consultant recommends that ongoing discussions be held by the three libraries with assistance from Region 2000 Local Government Council on integrating the holdings of the Lynchburg Public Library into the TLC Automation Network. Should progress be made in these discussions then at an appropriate time the Lynchburg Public Library would give a 12 month notice of their intent to leave LION.**

Based upon figures provided by TLC through Jenny Novalis, Technology Librarian for the Bedford Public Library System, full integration in the TLC system will cost Lynchburg \$74,000 with \$9,200 annually for full support costs. As Lynchburg currently uses acquisitions and serials modules of LION which are not currently a part of the TLC network, the cost for their purchase will be \$14,998 with \$2,998 annually in support costs. These costs include training costs for staff on the various modules involved. Lisa Broughman indicates that LION would charge Lynchburg Public Library \$15,900 for extracting its data from LION.

Currently Lynchburg Public Library is paying \$20,353.93 annually for costs relating to their participation in LION. The total annual costs projected above for their participation in the TLC Network are \$12,198.00.

Additional costs that will need to be considered by all libraries involved in creating a new and expanded TLC system include the establishment of a full-time IT tech position for the network. Currently a 20 hour a week IT tech provides assistance. In addition delivery services will need to be expanded to include the Lynchburg Public Library. This could be accomplished by adding a Forrest Library stop to the Lynchburg Public Library's van schedule.

While the \$104,989 initial cost to Lynchburg Public Library for joining the TLC Network is a capital expense that is not programmed in any capital budget at this time, it is essential if effective long-term cooperation with Bedford Public Library System and Campbell County Public Library is to be achieved.

A benefit to Lynchburg Public Library users in joining the TLC Network is the increase in materials that will be available for their use. Currently these users have access to materials held by the Lynchburg Public Library and the Amherst Public Library. As indicated earlier the libraries in this study had the following collection holdings in 2011.

Libraries	Total Holdings
Amherst County Public Library	111,638
Bedford Public Library System	206,818
Campbell County Public Library	231,017
Lynchburg Public Library	155,777

This chart indicates that Lynchburg Public Library users currently have access to 267,415 items. With Lynchburg Public Library's participation in the TLC Network this access would increase to 593,612 items or an increase of 122%. This is a substantial addition to the resources available to Lynchburg Public Library card holders. With access to the quality collections held by the Bedford Library System and the Campbell County Public Library System Lynchburg Public Library users would have a substantially larger resource base with which to meet their information and reading needs.

In summary, what would the residents of Lynchburg receive from the integration of their holdings into the TLC automation system?

1. Quick and easy access to collections substantially larger in both number and quality than currently possible.
2. Participation in an automation system that is current, well supported by the vendor and is easy to use.
3. Lower annual costs for system maintenance.

The residents of Bedford and Campbell Counties would be able to access Lynchburg Public Library holdings and those who work in Lynchburg would find their access to the Lynchburg Public Library an easier part of their daily activities.

Merging of Libraries in the Study

Once cooperation in programming is becoming a reality and consideration of the integration of Lynchburg Public Library's holdings into the TLC Automated Network is underway it is only logical that consideration should be given to merging the libraries in this study.

Thus, the consultant **recommends that a committee be formed at an appropriate time, under the coordination of Region 2000 Local Government Council, of administrative representatives of the governments of Bedford County, Campbell County, and City of**

Lynchburg and public library representatives to consider merging the three libraries into a new library system.

As indicated earlier in the report most of the individuals interviewed indicated that there was interest in considering further cooperation up to and including merger for the libraries in this study. Only the Friends of Lynchburg Public Library indicated little interest in this process.

In this time of budget reduction and the desire for efficient use of government resources it is essential that a thorough examination be given to merging the three libraries. It is also an opportune time for such examination as the directors of both the Bedford Public Library System and the Lynchburg Public Library are eligible for retirement.

The consultant wishes to disabuse anyone of the notion that a merged system is a way to provide substantial financial savings. ***Rather this concept should be examined from the standpoint of whether it will provide better library service.*** In combining the three libraries into one unit of service there will be cost savings from no longer needing three directors. There will also be cost savings from the consolidation of materials ordering, processing and cataloging functions. There will be new costs for necessary personnel to implement and manage expanded operations. The problem of three different personnel schedules may result in additional initial cost increases. However, a merged system can provide participating localities with more effective and stable long-term financial planning.

State Aid to Public Libraries was developed to encourage larger units of public library service.

State Aid Funding			FY13 Estimate
<u>Library</u>	<u>Population</u>	<u>Regional Funding FY13</u>	
Bedford	75,099		\$204,873.00
Campbell	54,926		\$148,520.00
Lynchburg	75,826		\$149,455.00
Total	205,851	\$510,603.00	\$502,848.00

As the above chart provided by the Library Development and Networking Division of the Library of Virginia indicates if the three libraries were to become a region in 2013 their state aid would total \$510,603.00. As independent libraries the three libraries would receive \$502,848.00 in state aid. This is only a \$7,755.00 difference. The reason for Bedford’s larger state aid figure in FY13 is that it currently is a regional library and benefits from the state aid formula for its status. However, the upcoming status change of the City of Bedford to town status could cost the Bedford Public Library System approximately \$81,000 due to the effects of the reversion and loss of regional library status. The merging of the three libraries could improve this funding to support a new regional library system.

Merging of the three libraries into a new system can provide the following long-term advantages:

1. Stability in funding through long-term operational planning and efficient use of available resources.
2. Better service to the user community through more efficient use of highly skilled individuals in program and service provision.
3. Cost savings through combining materials ordering, process and cataloging functions.
4. Better use of collection development funding to provide enhanced access to a wider variety of resources.

Issues to be considered during the work of this committee include:

- locations of service provision
- system governance
- policies of operation
- staffing levels
- staffing compensation and benefits
- local governments payment for library service

As indicated the list is long and complex. In gathering data for this study the consultant became aware of the differences in policies of the three libraries as well as in their job descriptions and compensation schedules. As indicated earlier, there is a chart indicating job titles and compensation ranges for the three libraries in the appendix.

The consultant in his tours of library facilities noted that the Bedford Library System have unassigned space in their main facilities which would be available for providing administrative and technical areas for a merged library system.

Suggestions for approaching this issue:

The consultant recommends that the following areas be covered in the merger discussions:

1. A detailed examination of the financial support of the three libraries. How is money being used in providing public library service? What differences in approach among the three libraries are found in this examination? What is the realistic expectation of future library support?
2. Consideration of how a merged library system would be funded and how the funding process would work? Would a merged library system keep all funds not expended during the Fiscal Year or would excess funds have to be returned to the funding entities? Which entity would be the merged system's fiscal agent? There are many approaches to determining cost allocation for regional library system operations. The consultant recommends that the committee consider using circulation of library materials for each

locality's cardholders from the previous fiscal year in allocating a government's responsibility for the coming fiscal year.

3. How would the merged system be governed? Within the Virginia Code requirements the committee will need to consider the number of Trustees and their allocation among the three funding entities. The consultant recommends having one Trustee from each governing entity be a member of the top administrative staff of that entity. The consultant has found that this assists in communication between the library and the governments that fund it.
4. Determining how current facilities are to be handled in a merged system. Do they automatically become the property of the new system or do they remain the responsibility of the government that currently owns them? If so responsibilities for upkeep and maintenance need to be clearly stated in any system contract.
5. Issues of any new branch locations and survival of current library locations need to be discussed during this process. What approval do new branches need? How will current locations fit into a broader service structure? Where should the headquarters of the new entity be located? The consultant recommends that current available space be considered for the headquarters location rather than new space being purchased or constructed.
6. Staffing issues is one of the more difficult issues to be discussed during the committee's work. Each library has differing job titles and salary schedules as well as employee benefits. How many staff do you need to operate the new system in an effective and efficient manner? What type of qualifications does this staffing level require? What salary and benefit schedule should be in place? How do you deal fairly with current staff as the merged system is being developed? How will human relations be dealt with? What services such as materials ordering, processing and cataloging can be combined and where would be the logical location for such service to be housed? The consultant recommends considering a contract for Human Relations related administration and service with one of the entities involved in the contract.
7. What policies should the merged library system have? Who will provide the system with legal advice and at what cost? These are items that need to be considered prior to the establishment of formal governance. Once governance is established the Board of Trustees can formally adopt policies for the new entity.
8. What are the roles of the director and the Board of Trustees in the new system? How does the director communicate and work with each of the governmental entities? The consultant would recommend that the director have the ability to attend administrative staff meetings of each entity so that they may be more knowledgeable about governmental operations and services and can better relate the library to each of these services.

9. How will technology be handled in a merged system? Will the merged system have its own IT staff? Will IT be handled by contracting with one of the entities involved in the system? How often will technology be upgraded? How will technology be backed up and where will databases be housed?

The above is directional guidance on issues relating to the creation of a merged library system. It is not all encompassing but presents essential aspects to be considered in any discussion of this subject.

The consultant hopes that this committee will be diligent in their study and base their actions and recommendations on fact and what is best for the provision of quality library service to all their residents.

Conclusion:

The provision of quality public library service in an era of financial constraint and constant change is a challenge. In the provision of this service it is essential that those responsible for this service examine ways to provide it in a fiscally responsible manner without loss of the individualized service that library users have come to expect from their public library. The recommendations in this study provide a road map for 21st Century library service for public libraries serving the Greater Lynchburg Metropolitan Area.

Through cooperative efforts in recent years under the guidance of Region 2000 Local Government Council, local governments have developed unified programs for a variety of governmental responsibilities. There is no reason that public library service should not be included in this mix.

The consultant does not underestimate the challenges to be faced if the recommendations in this study are followed. It takes knowledge, vision, courage and the ability to communicate effectively with each other and the community at large for any change of this substance and nature to take place. Regionalization has its benefits, as seen by other projects under the guidance of Region 2000 Local Government Council. There are benefits to public library consolidation and they should be considered as a part of the discussions proposed in this report.

The consultant wishes to thank all involved in this project for their time in gathering data, providing background information, sharing their wonderful communities through tours and discussions, and providing their visions of public library service for the communities they serve with love and dedication. It has been an honor to have worked with each of you.

Appendix:

Full-Time Salary Ranges

					Region 2000		
					Personnel Information		
					Full - Time Personnel		
Job Title			Bedford			Campbell County	Lynchburg
Director			\$70, 216.00			\$50,879.00	\$92,580.00
Associate Director			\$34,236.80 - \$50,460.80				
Assistant Director			\$32,364.80 - \$45,614.40				
Librarian III			\$30,430.40 - \$42,931.20				\$40,227.20 - \$64,355.20
Librarian II			\$28,516.80 - \$40,185.60				\$36,524.80 - \$58,448.00
Librarian I			\$26,166.40 - \$36,940.80				\$30,201.60 - \$48,318.40
Professional Librarian						\$28,093.00 - \$41,439.00	
Program Manager						\$26,755.00 - 39,465.00	
Library Associate - Accounting			\$22,276.80 - \$31,387.20				
Financial Professional II							\$38,396.80 - \$61,443.20
Circulation Supervisor							\$33,213.40 - \$54,184.00
Volunteer Coordinator							\$27,456.00 - \$45,032.00
Administrative Assistant II						\$29,499.00 - \$43,513.00	
Office Manager						\$25,481.00 - \$37,590.00	
Library Assistant III						\$24,267.00 - \$35,798.00	\$24,980.80 - \$37,977.60
Library Assistant II			\$21,240.00 - \$29,921.20				\$22,692.80 - \$36,316.80
Library Assistant I			\$19,240.00 - \$27,144.00				\$20,633.60 - \$33,966.40
Administrative Services - Associate II							\$24,856.00 - \$39,769.60
Library Clerk II							\$20,633.60 - \$33,966.40
Library Clerk I						\$18,105.00 - \$26,717	\$17,056.00 - \$28,038.40
Custodian - Courier			\$17,451.20 - \$24,585.60				
Substitutes			\$16,640 - \$23,899.20				
Page			\$15,080.00 - \$19,177.60				