

Region 2000
Regional Library Operations

May 2014



Management Partners



May 14, 2014

Mr. Robert E. White
Deputy Director
Region 2000
828 Main Street
Lynchburg, VA 24504

Dear Mr. White:

Management Partners is pleased to transmit this report on the options for a regional library system. This a result of collaborations with Region 2000's Working Group, discussions with the local government administrators, and best library practices. As the project progressed, it became clear that rather than detail a single solution to a regional system, a two-phased approach would be desirable, starting with a service sharing arrangement among the three library systems and working ultimately to have a regional system with all three participants. Our report provides detailed about this phased approach.

We appreciate the assistance of the Working Group in providing data and information as well as their ideas and opinions about what will help make this effort successful. Their input has been extremely valuable as we have moved through the various options.

Sincerely,

A handwritten signature in black ink, appearing to read "Gerald E. Newfarmer". The signature is fluid and cursive, with a large initial "G" and "N".

Gerald E. Newfarmer
President and CEO

Table of Contents

Executive Summary	1
Background	2
Project Approach.....	4
Document Review	4
Meetings and Interviews.....	4
Focus Groups	5
Regional Library – A Phased Approach.....	6
Service Sharing	6
<i>Implementation Planning</i>	8
<i>Pros and Cons</i>	9
Forming a Regional Library System with Bedford County, Campbell County and Lynchburg	10
<i>Regional Library Staffing Based on Best Practices</i>	12
Option: Campbell County and Lynchburg Form the Initial Regional Library System; Bedford Library System Participates in Service Sharing and Joins the Regional Library at a Later Date	21
<i>Regional Library Staffing Based on Best Practices</i>	22
<i>Estimated Budget</i>	24
Summary of Recommendations	31
Service Sharing	31
<i>Forming a Regional Library System with Bedford, Campbell and Lynchburg</i>	32
Option: Campbell County and Lynchburg Form the Initial Regional Library System; Bedford Library System Participates in Service Sharing and Joins the Regional Library at a Later Date	33
Conclusion	34
Attachment A – Summary of Results of Focus Groups	35
Attachment B – Regional Library Governance and Financing Models and Considerations....	40
Attachment C – Organization Chart for a Regional Library that includes Bedford, Campbell, and Lynchburg.....	44

Attachment D – Bedford Library System Position Descriptions for Library Assistant through Librarian III..... 45

Attachment E – Current Operating Budgets for Lynchburg, Bedford Library System and Campbell County Libraries..... 46

Attachment F –Implementation Plans..... 48

Attachment G – Organization Chart for a Regional Library with Campbell County and Lynchburg 50

Attachment H – Current Operating Budgets for Campbell County and Lynchburg Libraries51

Tables

Table 1.	Pros and Cons of Service Sharing.....	10
Table 2.	Estimated Total FTE and Personnel for Cost Bedford County, Campbell County and Lynchburg Regional Library.....	13
Table 3.	Current Personnel Costs (FY 2013) for Lynchburg Library, Bedford Library System and Campbell County Library	15
Table 4.	Regional Library Proposed Budget	16
Table 5.	Estimated Increase in State Aid for Bedford, Campbell and Lynchburg Regional Library.....	17
Table 6.	Example of Cost Sharing Allocation for Bedford County, Campbell County and Lynchburg Regional Library Using 2013 Data	18
Table 7.	Bedford, Campbell, and Lynchburg Cost Share Allocations Using FY 2013 Data	18
Table 8.	Regional Library Estimated Cost Savings By Locality	19
Table 9.	Pros and Cons of Bedford County, Campbell County and Lynchburg Regional Library.....	21
Table 10.	Estimated Total FTE and Personnel Cost Campbell County and Lynchburg Regional Library	23
Table 11.	Current Personnel Costs (FY 2013) for Lynchburg and Campbell County Libraries.....	24
Table 12.	Campbell County and Lynchburg Regional Library Proposed Budget	25
Table 13.	Estimated Increase in State Aid for Campbell County and Lynchburg Regional Library.....	26
Table 14.	Cost Sharing Percent Campbell County and Lynchburg Library Using FY 2013 Data.....	27
Table 15.	Campbell County and Lynchburg Cost Share Allocations Using 2013 Data	27
Table 16.	Campbell County and Lynchburg Regional Library Estimated Cost Savings by Locality.....	28
Table 17.	Pros and Cons of Campbell County and Lynchburg Regional Library	30

Executive Summary

“One of the best predictors of future failure is past success.”

Shafeen Charania

Often when we are on a course proven to be successful, we resist changing our approach, even when there are compelling reasons to do so. Clearly, the three library systems being examined, Bedford County, Campbell County, and Lynchburg Public, are each successful and have a strong base of patrons that value their services.

Through discussions with the Working Group and the three administrators of the jurisdictions involved, it became clear that a two-phase approach toward regionalizing library services was desired, starting with sharing services among the three libraries and moving towards the ultimate goal of a fully functioning regional system with all three systems participating as soon as possible.

Two of the libraries (Bedford County and Campbell County) are already sharing their integrated library system (ILS) and have been doing so for the past several years. Because they share an automation platform the libraries share one catalog that includes all the holdings of both. In effect, the collections of the two libraries function as one and a delivery system moves materials among and between branches. A shared ILS among all three systems (the first phase) will provide patrons with access to resources in each of the 12 libraries.

This report provides an overview of each step on the path to regionalization: first, sharing services among the three systems followed by Bedford County, Campbell County, and Lynchburg forming a regional library. An option for the second phase is a regional library with Campbell County and Lynchburg (continuing to share services with Bedford Library System) and adding Bedford County at a later date to achieve the ultimate goal of a regional library system with all three. Management Partners has identified the pros and cons of each phase as well as the necessary implementation steps and recommendations for going forward.

Background

Region 2000 began exploring the concept of implementing service improvements with all library directors in its area several years ago. Initial discussions then led to further interest in considering a regional library system including Bedford County, Campbell County and the Lynchburg Public Library. Dominion Library Associates conducted a Public Libraries' Opportunities Analysis, which recommended in May 2012 to continue to explore the effort.

In May 2013 a Region 2000 document titled "Initial Cost/Benefit Analysis and Moving Forward" summarized discussions and analysis that had taken place with the Regional Libraries' Discussion Working Group. The Working Group included the directors of the three libraries, the Lynchburg Deputy City Manager, and the Deputy Director of Region 2000 Local Government Council.

That document identified the following compelling reasons for continuing to explore creating a regional approach to library services.

- To ensure the responsible stewardship of public resources. With continuing stress on localities' financial resources, exploring more cost effective and efficient means to provide library services is imperative. A regional approach can provide this benefit.
- To improve public library service delivery. Each of the three library systems provides sound service. Each of the systems has developed particular strengths. If shared regionally, these strengths will elevate the total service delivery standard.
- To ensure resilient public library service to the three communities in the face of on-going financial stress. Technological requirements and service delivery demands continue to grow, while funding is proving more difficult. The Working Group's research concluded regional service delivery provides the strongest position to meet these needs.
- The opportunity to provide unobstructed access to all library resources for all users. City/County boundaries are becoming increasingly irrelevant to service delivery. The commuting nature

of citizens, with homes in one locality, work places in another, shopping and recreational opportunities in still others, places value on flexible access to facilities and services.

The Working Group also estimated that a regional library could cost approximately \$500,000 less per year to operate by eliminating duplication of administrative and support service functions.

The governing bodies of the three jurisdictions endorsed continuing to analyze the possibility of a regional library. Region 2000 then issued a request for proposals (RFP) to hire a consultant to conduct a more detailed operational analysis. The Working Group guided the effort and Management Partners was selected to conduct this work.

The operational analysis included developing a plan for a regional library and sharing services among the three libraries. The outcomes being sought were recommendations for a regional approach that reduce costs, maintain or improve service delivery and support a sustainable business model.

Prior to July 1, 2013, the Bedford Library System was a regional library consisting of the City of Bedford and Bedford County. When the City of Bedford transitioned to a town, the Bedford Library System became a department of the County government. Its six branches provide services over an area of 769 square miles to the County's 75,099 residents. During FY 2013, a total of 461,472 items were loaned.

Campbell County Library serves a population of 55,163 spread over 507 square miles from four facilities. It circulated 231,449 items in FY 2013. It is currently the only one of the three libraries to provide an adult literacy program, which is coordinated by a staff member working with volunteer tutors. A new, larger Timbrook library is in the planning stages.

The Lynchburg Library serves its 77,113 residents from a main library and a small downtown branch that is also a public law library. It loaned 478,118 items in FY 2013, nearly all from its main library. Its service area is a compact 49.6 square miles. The main library is the largest in the area and serves a more urban population than the two other systems.

Project Approach

Management Partners used various analytical techniques in completing our work for this project. We reviewed numerous documents, conducted individual interviews with Working Group members, held discussions with directors of two regional library systems in Virginia and a public library consultant at the Library of Virginia. We also identified best practices for library operations, as appropriate. We conducted focus groups with staff in each of the three library systems and held several meetings and a workshop with the Working Group. The following sections describe the major components of our approach.

Document Review

During the course of this study, Management Partners' project team members reviewed numerous documents including organization charts, budget and financial reports, library statistics for each system, position descriptions, and reports of past regional library discussions, including the report from Dominion Library Associates and follow-up information generated by the Working Group.

Meetings and Interviews

Management Partners began this project by meeting with the Working Group to discuss the outcomes it was seeking and hear about the initiatives that had been recently completed. Following the kickoff meeting, we interviewed each library director individually. Throughout the study we corresponded often to share ideas, answer questions and discuss data needs. We met periodically to discuss preliminary ideas and recommendations and get feedback.

In addition to meeting with the Working Group, we met with the administrators of the three jurisdictions twice. The focus of the first meeting was to hear their objectives and ideas about the project. The purpose of the second meeting was to provide information and receive feedback and direction.

Focus Groups

Management Partners' team members held one focus group with a cross-section of staff in each of the library systems. A total of 34 individuals participated. The participants were asked about their views in five areas:

- Potential benefits of a regional library system for library users;
- Potential downside of a regional library system for library users;
- Potential benefits of a regional library system for library staff;
- Potential downside of a regional library system for staff; and
- Future changes that will affect library service.

In general, participants indicated that library users would benefit from a regional system because they would have better access to materials and other library resources; technology would be improved (internet service, content of the website and better hardware and software); and they would benefit from economies of scale and other efficiencies. Eliminating the library card fee in Lynchburg and the reciprocal fee in the Bedford Library System and instituting shorter turnaround times for interlibrary loans were also common themes.

Potential downsides for library users mentioned by focus group participants included the concern that greater competition for resources might leave some patrons without the resources they want; perceptions of inequity by the public and staff about sharing resources and facilities; and some loss of identity.

Participants identified many potential benefits of a regional system for staff. These included better pay and career paths, more opportunities to share expertise, improvements to technology, and improvements in services. As might be imagined, when the question was posed about the potential downside of a regional system for staff, many concerns about employment, salaries and benefits were raised as well as leadership for the system.

A summary of the results of the focus group is included as Attachment A.

Regional Library – A Phased Approach

Management Partners provided information for a workshop on January 24 with the Working Group, followed by a discussion with the administrators of the three jurisdictions. As a result of the latter discussion, it became clear that the best way to move to a regional system is in two phases, starting with shared services and then creating a regional system with all three localities participating.

Management Partners was asked to provide information about each of two phases:

- Sharing services through a cooperative agreement, and
- Forming a regional library with all three jurisdictions. If necessary, an alternative is to form a regional library with Lynchburg and Campbell County (with Bedford Library System sharing services) and the possibility of Bedford County or other jurisdictions joining at a later date.

A Bedford County, Campbell County and Lynchburg Regional Library will provide a combination of the highest quality library services at the lowest cost to the residents of the three localities. It is the best outcome and should be actively worked toward. As decisions are made concerning shared services, this ultimate goal should be kept in mind.

The two phases are discussed below. We have provided a general description of each, discussed implementation issues (including any financial implications), as well as the pros and cons.

Service Sharing

Sharing services is the quickest and easiest way for the libraries to provide improved services to their patrons. Two of the libraries (Bedford Library System and Campbell County) are already sharing their integrated library system (ILS) and have been doing so for the past several years. Because they share one automation platform the libraries share one catalog that includes all the holdings of both. Library users can access the catalog electronically to search for materials and request that

they are sent to any library they choose. Patrons may also return borrowed items to any library. In effect, the collections of the two libraries function as one and a delivery system moves materials among and between branches.

Expanding the shared ILS to include Lynchburg will provide patrons with access to resources in all twelve library facilities. They will also be able to choose where to pick up and return materials, which is an added convenience especially to individuals who work in one community and live in another.

During focus groups, participants from Bedford Library System and Campbell County commented on the issues they encountered during implementation, but indicated the system is now working well. They reported that patrons are very pleased with the additional access to materials and the convenience of the shared ILS and delivery system.

A revised Memorandum of Understanding (MOU) to include Lynchburg in the shared ILS can be approved administratively and should be fairly simple to complete. Lynchburg's data and files will have to be transferred from the ILS it now uses to the new one. The recent experience of staff at the other two libraries in carrying out similar conversion activities will be helpful to Lynchburg as it undertakes these tasks.

This shared ILS is a prerequisite for regional library operations. A regional library cannot function unless it uses one library automation platform that includes an online catalog as well as library patron and circulation records, inventory management, and other essential library operational tools. It is the ideal starting point for these three library systems to move toward true regionalization.

In addition to the shared ILS, the libraries can identify other ways they can work together to enhance services. They could implement cooperative collection development to stretch their scarce library materials budgets. For example, one library would agree to buy more health-related materials and another more business and financial books and a third more travel titles. They could also share successful children's, teens' and adults' programs. These can be time-consuming to prepare and could be repeated in several locations.

Shared services will bring substantial improvements for patrons by giving them ready access to the collections and facilities of all three library systems. However, this approach does not provide the full range of benefits and cost-effective service that a single regional library will bring. A single, unified management structure that plans and provides

library services, develops one collection, operates under the same policies and procedures, and uses one technology platform would result in more robust, flexible, and sustainable library services over the long term.

Implementation Planning

Three important implementation issues exist: 1) including Lynchburg in the integrated library system (ILS) now shared by Campbell and Bedford, 2) eliminating the library card fee, and 3) developing a delivery system.

First, Lynchburg will need to participate in sharing the system used by Bedford Library System and Campbell County. Lynchburg is required to give one year's notice that it will leave the group of libraries with which it currently shares a different ILS product and should do so as soon as possible. The MOU between the two localities should be revised to include Lynchburg. The conversion of Lynchburg's patron and bibliographic data and its transfer to the formats of the shared ILS, as well as any upgrades to the shared servers and other equipment will take some time to complete and should begin as soon as possible.

It is our understanding the costs of migrating from the current system and participating in this shared ILS are included in Lynchburg's FY 2015 Proposed Budget. During discussions with administrators, a desire to take action in the near-term, if possible, was expressed. Therefore, the revisions to the MOU should begin immediately as should determining exact participation costs (including any desired additional software functions such as acquisitions). A detailed plan for Lynchburg to migrate to the shared ILS must also be developed in conjunction with the ILS vendor.

Bedford Library System has already implemented the current public library best practice of using radio frequency identification (RFID) tagging of its physical collections and patron self-check-out machines that relieve staff of most check-out tasks. Public libraries have found that 85% or more of check-out transactions can be completed by patrons when this technology is properly deployed by reconfiguring space to replace large circulation desks with self-check stations and a small service point for assisting patrons with obtaining library cards and managing their accounts.

As part of implementing the shared ILS, Lynchburg should include the costs of converting from barcodes to RFID tags and adapting the Main Library layout to accommodate self-check-out machines and consolidating service points in the FY 2015 or FY 2016 budget. Lynchburg

library annually checks out nearly half a million items per year. If funding is available, this high level of activity also justifies the purchase of an automated sorting machine for returned materials. This too will require some building modification.

Another issue to be addressed is the library card fee currently charged to non-residents by Lynchburg. Because the City charges a fee to non-residents a reciprocal fee is charged by Bedford Library System. To reap the benefits of a shared service, the fee would need to be eliminated by Lynchburg.

Another implementation issue to be addressed is the need to extend the frequent interlibrary delivery system to include Lynchburg so requested resources are distributed quickly. Bedford and Campbell have this system in place and Lynchburg will need to be added.

There is potential for sharing other services as well. Some areas that lend themselves to sharing include youth and adult programming, staff training, and joint purchasing of equipment and materials. The three library directors and other appropriate staff should meet regularly to evaluate shared services and identify additional opportunities for cooperative activities and services.

Pros and Cons

This is the necessary first step toward making library services both more efficient and effective. Library patrons will experience substantially better access to a larger total library collection as well as the convenience of choosing to use any of the twelve facilities. However, the three libraries will still be duplicating support and administrative tasks and the staff to accomplish them as well as operating under different policies and procedures as determined by their locality. Sharing services will not achieve the goal of a unified management structure providing services to all three communities in an efficient, cost-effective manner.

Table 1 summarizes the pros and cons of service sharing.

Table 1. *Pros and Cons of Service Sharing*

Pros	Cons
Better access to resources for all patrons in the three library systems	Personnel and resources remain the purview of their respective localities
Improved convenience for all patrons through use of any facility to pick up or return materials	Small loss of revenues from library card fees
Implementation can be accomplished administratively	Delivery system covers larger physical area
Each library system retains its autonomy, control and management	Duplication of administrative and support services, activities and costs continues
Sharing resources might also include joint purchasing to take advantage of economies of scale in the future	
Ability to implement quickly using a memorandum of understanding	

Forming a Regional Library System with Bedford County, Campbell County and Lynchburg

The next step in the phasing of regional library services is establishing a regional library serving Bedford County, Campbell County and Lynchburg. The regional library would need to use one ILS in order to function as one library. Bedford County and Campbell County already share an ILS, and Lynchburg will be moving as rapidly as possible to join them under the Shared Services Model.

The concrete steps needed to form a regional library can begin during implementation of the shared ILS. The localities will need to develop a contract to be approved by their governing bodies that establishes the regional library. It will need to include detailed information about its governance (including a governing Board of Trustees), funding, and operations. Attachment B identifies many of the specific topics to be included in a contract. In addition, The Library of Virginia must be notified of the intent to form a new regional library.

The regional library will operate all the public library services and facilities. Its Board of Trustees will set policies, appoint the library director, recommend an annual budget to the jurisdictions’ governing bodies, and carry out other responsibilities as outlined in the contract or by-laws. It will employ the workforce and set salaries, benefits, and other personnel policies.

The jurisdictions will retain ownership of the library buildings and grounds, and be responsible for paying any costs of leased or rented

facilities. Each jurisdiction will be responsible for capital improvements and replacement of building systems and components as well as capital maintenance of parking lots and landscaping.

In a January 2014 meeting with the administrators of the jurisdictions and the Working Group, it was agreed that the localities would have responsibility for all costs of maintaining buildings and grounds, including custodial services, HVAC, electrical and mechanical systems, and plumbing as well as utilities and property insurance. In addition it was proposed that each locality could provide one or more support service at no cost to the regional library. For example, Lynchburg could provide fiscal and auditing services for the regional library at no cost while Campbell County could provide human resources services and Bedford County could provide legal and purchasing services.

Bedford Library System Board of Trustees and staff would contribute valuable perspective and experience in operating a regional library. Until recently, when the City of Bedford transitioned to a town, it was a regional library serving the City of Bedford and Bedford County. However, Bedford County's participation would do much more than simply benefit the other two library systems as they form a regional library.

Bedford County residents would gain access to the combined resources and programs of the larger region. In addition, a regional library benefits from the singular focus of its governing Board of Trustees on setting policies, conducting strategic planning, managing the budget, providing programs, and developing a workforce to provide the best possible library services with the resources available. The localities continue to provide oversight and accountability through the appointment of Trustees and the budget approval processes set forth in the regional library contract.

Regional libraries are able to react more quickly and creatively to changes and opportunities than a library that is part of a larger local government entity. For example, changes in staffing can be made more quickly when a vacancy occurs. A job description can be changed, a position may be filled at a lower or higher level as circumstances require or it may be held vacant or eliminated to shift funding to another purpose, such as implementing a newly available technology that will improve services or reduce costs.

Public libraries are currently undergoing tremendous changes in response to changing technology and to user behaviors and expectations.

Libraries are packed with people using collections, library computers, and technology. Other patrons are accessing libraries remotely using smartphones, tablets and home or work computers. E-books and other e-materials are heavily used, as are physical collections. Many patrons require assistance to use library resources via their mobile devices. Others turn to the library to provide their only access to the Internet and computers and need assistance learning to use them. The library continues to be an important provider of early childhood literacy and reading programs for children. Adults also want to participate in programs such as book clubs, computer classes, and arts and cultural presentations.

Small libraries have even more difficulty meeting these increasingly diverse demands than medium-sized ones, such as a regional library serving 200,000 residents. In a regional library, programs and services are provided by a larger staff with a broader variety of skills and interests. A successful program or activity can be replicated at a number of facilities. Some economies of scale can be captured, providing higher quality and a greater number of services.

Regional Library Staffing Based on Best Practices

The staffing plan developed for the regional library assumes it will adopt a service model based on public library best practices. This includes having self-service checkout machines available at every library and ensuring they become the primary check-out mechanism. The number and size of public service desks will be reduced and staff members will be cross-trained to assist patrons of all ages with many different needs for information and assistance. Library managers and masters-degreed librarians will primarily work on tasks that need their specialized training or experience. They will be available to assist patrons when needed but will not generally be scheduled to be at public service points for extended periods of time.

Other best practices included in the service model include use of social media to obtain feedback and participation rather than simply distributing information, providing a website with more interactivity for users and centralizing responsibility for collection management, including materials selection and de-selection.

Implementing this service model will require extensive staff training. In addition, it will require an investment in RFID technology including self-check machines and, potentially, sorting machines at high-circulating facilities. The service model will function most efficiently if RFID tags are

added to existing collections as well as to new items. Changes to the interior layout of the libraries to improve the workflow for returned materials and to make self-check-out machines easy to find and use will also be important.

Lynchburg has identified funding in the FY 2015 Proposed Budget for its costs to participate in a shared ILS with Campbell County and Bedford Library System. If additional funds are needed to add RFID tags to its collection and purchase related equipment, these should be considered for inclusion in the FY 2016 budget. Additional capital funds will be required to reconfigure the library and to add an automated sorting machine for returned materials.

As previously mentioned, Campbell County is planning a new Timbrook Library, which is being designed to reflect this service model (including RFID). However, an investment in RFID technology and minor remodeling at the Main Library in Rustburg (the highest priority), as well as Staunton River Memorial Library and Patrick Henry Memorial will be needed to make the changes necessary to implement this best practice service model.

Bedford Library System already has self-check machines at all of its branches but additional capital funds may be required to add automated sorting machines for returned materials given the high rate of circulation at the Forest and Bedford libraries.

Table 2 is a staffing plan with personnel costs for the regional library. Employer-paid benefits are calculated using Region 2000 health care and Virginia retirement system (VRS) rates. Salaries and wages are generally based on the mid-point of those for Bedford Library System, which fall between those of Lynchburg and Campbell County. An organization chart showing this staffing plan in detail is provided in Attachment C. Position descriptions for several library-specific jobs for the Bedford Library System are provided in Attachment D.

Table 2. Estimated Total FTE and Personnel for Cost Bedford County, Campbell County and Lynchburg Regional Library

Department/Position Title	Total FTE	Total Personnel Cost
Regional Library Executive Staff		
Library Director	1	\$94,310
Library Assistant Director	1	\$70,596
Administrative Assistant	1	\$38,561
Total Regional Library Executives	3	\$203,467

Department/Position Title	Total FTE	Total Personnel Cost
Administrative Services		
Administrative Services Manager	1	\$48,875
Accounting Associate	1	\$37,197
Administrative Clerk	1	\$35,479
Courier/Delivery	1	\$22,626
Senior Maintenance Worker	1	\$36,284
Maintenance Worker	1	\$30,303
Total Administrative Services	6	\$210,764
Collection Management/Technical Services		
Collection Management/Technical Services Librarian	1	\$48,875
Library Assistant II	1	\$35,692
Library Assistant I	1.5	\$37,449
Total Collection Management/Technical Services	3.5	\$122,016
Technology Services		
Technology Services Librarian	1	\$48,875
IT Support	2	\$85,592
Library Assistant II	0.5	\$13,759
Total Technology Services	3.5	\$148,226
Bedford County		
Bedford Central Library Manager II	1	\$48,875
Forest Library Manager II	1	\$48,875
Moneta Library Manager II	1	\$48,875
Big Island Library Manager I	1	\$46,112
Montvale Library Manager I	1	\$46,112
Stewartsville Library Manager I	1	\$46,112
Bedford Central Library Youth Services Librarian	1	\$46,112
Library Associate	4.0	\$148,788
Library Assistant I	9.5	\$237,179
Page	2.5	\$46,098
Total Staff in Bedford County	23.0	\$763,138
Campbell County		
Campbell County Main Library Manager II	1	\$48,875
Timbrook Library Manager II	1	\$48,875
Patrick Henry Memorial Library Manager I	1	\$46,112
Staunton River Memorial Library Manager I	1	\$46,112
Campbell County Youth Services Librarian	1	\$46,112
Library Associate	4.0	\$148,788
Library Assistant II	3	\$82,555

Department/Position Title	Total FTE	Total Personnel Cost
Library Assistant I	5	\$124,830
Page	3.5	\$64,537
Total Staff in Campbell County	20.5	\$656,796
Lynchburg		
Lynchburg Main Library Manager II	1	\$48,875
Downtown/Law Library Associate	1	\$37,197
Lynchburg Youth Services Librarian	1	\$46,112
Library Associate	3.5	\$126,034
Library Assistant II	1	\$27,519
Library Assistant I	4.5	\$112,348
Page	4	\$73,757
Total Staff in Lynchburg	16.0	\$471,842
Grand Total	75.5	\$2,576,248

The above table uses health care costs from Region 2000 at \$5,382.36 per year for employer paid premium. The retirement contribution was calculated at 10.92% of salary based on Region 2000 VRS rate.

Table 3 shows the current personnel costs for the Bedford, Campbell County and Lynchburg libraries. Attachment E shows the current library budgets for each of the three library systems.

Table 3. Current Personnel Costs (FY 2013) for Lynchburg Library, Bedford Library System and Campbell County Library

	Lynchburg	Bedford	Campbell	Total
Salaries and Wages	\$935,433	\$896,728	\$583,510	\$2,415,671
Employee Benefits	\$342,618	\$205,585	\$179,461	\$727,664
Total	\$1,278,051	\$1,102,313	\$762,971	\$3,143,335

Includes salaries, wages and all employee benefits offered by the current employer

Estimated Budget

The annual operating budget shown in Table 4 for this regional library does not include any costs related to building and grounds maintenance and repair, rental or lease of property, and utilities since it is proposed that the localities continue to pay those. Nor does this budget include the costs of fiscal, audit, purchasing, legal and human resources services. Instead it is proposed that the localities contribute these services without cost to the regional library. For example, Lynchburg might provide fiscal, accounting, and audit services, Campbell County human resources services, and Bedford County purchasing and legal services. Estimated costs are based on FY 2014 budgets and will require updating when the first annual regional library budget is prepared.

Table 4. Regional Library Proposed Budget

	Total Combined Lynchburg, Bedford and Campbell Library Budgets	Regional Library Proposed Budget	Difference
Personnel Services			
Salaries and Wages	\$2,415,671	\$2,120,704	\$ (294,967)
Benefits	\$727,664	\$455,552	\$ (272,112)
Operating Expenses			
Library Materials	\$470,201	\$470,201	\$ 0
Programming Supplies and Services	\$13,150	\$13,150	\$ 0
Vehicle Operating	\$8,339	\$10,000	\$ 1,661
Telecommunications	\$102,418	102,418	0
Public Information and Communications	\$750	\$20,000	\$ 19,250
Computer Equipment	\$40,479 (Does not include \$26,975 in Lynchburg IT budget)	\$90,000	\$ 49,521
Software Licenses and ILS Software Maintenance / Upgrade Contract	\$87,385 (does not include \$13,000 in Campbell County IT budget)	\$100,500	\$ 13,115
Equipment Rentals and Leases	\$15,800	\$15,800	\$ 0
Insurance (Property, Auto, Liability, E&O, Surety Bonds)	\$12,724	\$12,724	\$ 0
Professional Services	\$32,500	\$15,000	\$ (17,500)
Office Supplies and Services (including Volunteer costs)	\$57,544	\$56,000	\$ (1,544)
Postage, Mailing, Shipping	\$11,093	\$11,000	\$ (93)
Memberships / Conferences / Meetings	\$9,543	\$8,000	\$ (1,543)
Travel, Lodging, Mileage Reimbursements	\$11,350	\$11,000	\$ (350)
Subtotal Personnel Services	\$3,143,335	\$2,576,256	\$ (567,087)
Subtotal Operating Expenses	\$873,275	\$935,793	\$62,518
Total	\$4,016,610	\$3,512,049	\$(504,564)

The regional library budget is \$504,564 less than the combined budgets of the three libraries. However at least \$40,000 of library costs (primarily IT-related costs) are now included in other parts of the locality budgets but are shown here as part of the regional library budget. Therefore, the

operating expenses shown in Table 4 are not directly comparable to the adopted library departmental budgets. When the IT-related costs now included in other parts of the localities’ budgets are taken into consideration, annual operating costs remain essentially the same as they are now.

Analysis shows that \$567,087 savings would come from reduced costs for salaries, wages and benefits. Annual costs for personnel would be reduced by approximately 18%. Salaries were assumed to be at the midpoint of Bedford Library System’s ranges because they fall between those of Campbell County and Lynchburg. A portion of the reduced benefit costs are attributable to using the moderate Region 2000 VRS rate as the assumed rate the regional library would pay instead of the higher rate that Lynchburg presently pays.

Most of the operating budget of the three libraries, like that of all public libraries, is spent on personnel-related costs. Because the materials budgets of the three libraries are comparatively low, the regional library budget for library materials should not be reduced. Other operating costs are a minor portion of the budget and present few opportunities for economies of scale. For example, costs for telecommunications including Internet access are among the larger items in the libraries’ non-personnel budgets but are unlikely to see significant reductions as a result of forming a regional library because the costs are driven by the number of library facilities, their locations, and the broadband speeds required.

State aid for regional libraries is slightly higher than for single locality libraries. As Table 5 illustrates, The Library of Virginia estimates that annual state aid for the regional library would increase by \$27,759.

Table 5. *Estimated Increase in State Aid for Bedford, Campbell and Lynchburg Regional Library*

	Current State Aid
Bedford Library System	\$207,980
Campbell County	\$151,872
Lynchburg	\$153,042
Total	\$512,894
State Aid Estimate for Regional Library	\$540,653
Estimated Increase in State Aid	\$27,759

Sharing the Costs of a Regional Library among Localities

For purposes of this study, Bedford County, Campbell County and Lynchburg are assumed to share the operating costs based on the average of their percentage of total population and the percentage of total circulation by their residents regardless of location of checkout, using the most recent fiscal year data available at the time the annual budget is approved by the Regional Library Board of Trustees for submittal to the localities. A specific cost sharing formula would be included in the contract between the localities that establishes the regional library.

The formula is the average of the two equally weighted factors of population and circulation.

$$\text{Locality share} = \% \text{ of population} + \% \text{ of circulation by locality residents} / 2$$

Table 6. Example of Cost Sharing Allocation for Bedford County, Campbell County and Lynchburg Regional Library Using 2013 Data

Locality	Population	Population Percentage	Circulation to Residents ¹	Circulation Percentage	Cost Share Percentage
Bedford County	75,099	36.2%	461,472	39.4%	37.8%
Campbell County	55,163	26.6%	231,449	19.8%	23.2%
Lynchburg	77,113	37.2%	478,118	40.8%	39.0%

¹For illustration purposes only. Circulation figures may be total circulation at library, not total circulation to own residents. Source of 2012 population is U.S. Census Bureau.

Table 7 shows the cost allocation formula applied to the regional library budget.

Table 7. Bedford, Campbell, and Lynchburg Cost Share Allocations Using FY 2013 Data

	Allocations
Total Budget	\$3,512,049
Less State Aid	(\$540,653)
Local Funds Total	\$2,971,396
Bedford County Cost Share @ 37.8%	\$1,123,187
Campbell County Share @ 23.2%	\$689,364
Lynchburg Share @ 39%	\$1,158,845

These cost share allocations cannot be directly compared to the costs of operating the current libraries because the proposed budget assumes that each locality will continue to pay all costs related to operating buildings,

including utilities, building maintenance, custodial and minor repair costs. In addition, it also assumes that each locality will contribute without cost to the regional library one or more support services such as fiscal, human resources, and purchasing. Currently, Bedford Library System’s budget includes most of these support services, but generally the costs to provide them in Campbell County and Lynchburg come from the budgets of other departments. For comparison, the Bedford Library System’s FY 2014 budget excluding state aid is \$1,578,020 and the Campbell County Library FY 2014 budget excluding state aid is \$884,759. Lynchburg Library’s FY 2014 budget excluding state aid is \$1,374,952.

The proposed regional library budget cannot be compared directly to the costs of operating the existing libraries because some expenses will be borne by the localities that are currently charged to each library’s budget. However, it is possible to estimate the savings for each locality based on the projected personnel and benefits budget of the regional library compared to those of the three separate libraries. Table 8 shows the estimated cost reductions for Bedford County, Campbell County. And Lynchburg.

Table 8. Regional Library Estimated Cost Savings By Locality

	Lynchburg	Bedford	Campbell	Total Personnel Costs
Current Personnel Costs	\$1,278,051	\$1,102,313	\$762,971	\$3,143,335
Percent Cost Share for Regional Library**	39%	37.8%	23.2%	100%
Share of Regional Library Personnel Costs	\$1,004,737	\$973,822	\$597,690	\$2,576,248
Savings	\$273,314	\$128,491	\$165,281	\$567,087

*Only personnel costs are shown here; savings for non-personnel costs are not able to be determined because some costs will be borne by the localities that are now in the budgets of some or all of libraries.

**Estimated percent of share by Management Partners. This will ultimately be determined in a contract among the localities.

Implementation Planning

Creating a new public entity is a complicated and time-consuming process. It requires a project team led by a project manager able to commit substantial time to leading implementation until a regional library director is appointed. A detailed implementation plan, with a timeline, budget, and specific tasks assigned to specific people needs to

be developed early in the process. A draft implementation plan showing major tasks to form a regional library is included as Attachment F.

Bedford County, Campbell County, and Lynchburg administrators or their designees need to develop a contract for approval by the three governing bodies. Attachment B identifies major issues to be considered and decisions to be made in the contract. In addition, the contract should become effective prior to the regional library providing services so that many start-up activities, such as contracts for health insurance, VRS, and other services can be completed and in effect, staff hired and trained, policies and procedures developed, etc.

The regional library director should be hired well before the regional library begins to function. Because the director will report to the board of trustees, board members should be appointed and take office even sooner. This will enable them to participate in the recruitment process and hiring of the director.

Major implementation steps include developing human resources policies, job descriptions, and salaries and benefits. Consulting assistance may be helpful if the localities do not have resources available to complete this work. Having a budget for start-up activities and costs about nine months prior to the “Go Live” date is a necessity.

Another key activity will be to develop and implement a process for selecting employees of the regional library. Staff members of the current libraries are understandably concerned about whether they will have a position in the regional library as well as what their salaries, benefits, and job duties or assignments to a specific branch will be. Decisions about, for example, whether current employees will be given preference over other applicants, will need to be made and communicated as early as possible.

A related issue is providing support for the current libraries’ employees during the transition period while they experience uncertainty about their employment and face substantial changes in their work (whether or not they become employed by the regional library). The implementation plan should include specific activities during the transition and frequent and open communication as well as change management training for the employees and their managers.

Office space for the regional library’s administrative and support services will need to be identified early on. Both Lynchburg and Bedford are possible locations. Some reconfiguration of back office space will likely be required.

Library users and the general public will also need to learn about the change to a regional library and how it will improve library services. Development of a communications plan that includes public information presentations, press releases, and collateral materials is a best practice. The plan and materials will need to be utilized some months before the regional library begins service. Patrons will ask library staff about the plans for a regional library. Therefore, staff will need to be prepared to respond to questions.

Ensuring that the regional library can operate using current public library best practices will require capital investment in making improvements to the library facilities to implement self-checkout, reduce the number and size of service points, and also require funding to fully utilize RFID technology.

Pros and Cons

Table 9 summarizes the pros and cons of a regional library that includes Bedford County, Campbell County and Lynchburg.

Table 9. Pros and Cons of Bedford County, Campbell County and Lynchburg Regional Library

Pros	Cons
Eliminates duplication of efforts for administrative and support services	Regional library is employer and current library staff might not be guaranteed jobs. Salaries, wages, and benefits will be different.
A best practice service model will be delivered throughout the regional library	Some planning and start-up effort is required to form a new, larger regional library
Library patrons benefit from larger library system with more staff, one technology platform, and other resources	Service model requires investment in technology and some remodeling of buildings
Governing body is focused only on library and its policies; library can react to opportunities and changes more quickly than as part of a larger organization	
Provides cost savings compared to current separate libraries	

Option: Campbell County and Lynchburg Form the Initial Regional Library System; Bedford Library System Participates in Service Sharing and Joins the Regional Library at a Later Date

If Bedford County decides not to join a regional library at this time, the ultimate goal of a regional library serving all three localities can be achieved over time. Campbell County and Lynchburg could form a regional library. Bedford Library System, which now shares an Integrated

Library system with Campbell County, could continue to do so with the new regional library. Bedford County could join the regional library at any point in the future.

The regional library will operate all the public library services and facilities in Campbell County and Lynchburg. Its Board of Trustees will set policies, appoint the library director, recommend an annual budget to the locality governing bodies, and carry out other responsibilities as outlined in the contract or by-laws. It will employ the workforce and set salaries, benefits, and other personnel policies.

The localities will retain ownership of the library buildings and grounds, and be responsible for paying any costs of leased or rented facilities. They will have responsibility for capital improvements and replacement of building systems and components as well as capital maintenance of parking lots and landscaping.

As indicated previously, at a January 2014 meeting with the administrators of the jurisdictions and the Working Group, it was agreed that the localities would have responsibility for all costs of maintaining buildings and grounds, including custodial services, HVAC, electrical and mechanical systems, and plumbing as well as utilities and property insurance. In addition, it was proposed that each locality could provide one or more support service at no cost to the regional library. For example, Lynchburg could provide fiscal and auditing services for the regional library while Campbell County provides human resources services.

Regional Library Staffing Based on Best Practices

The staffing plan shown in Table 10 assumes this regional library will adopt a service model using public library best practices as described previously in this report.

Table 10 is a staffing plan with estimated personnel costs for this regional library. Employer-paid benefits are calculated using Region 2000 health care and Virginia retirement system rates. Salaries and wages are generally based on the mid-point for Bedford Library System, which falls between those of Lynchburg and Campbell County. Attachment G provides an organization chart showing this staffing plan in detail. Table 11 shows the current personnel budgets for the Campbell County and Lynchburg libraries.

Table 10. Estimated Total FTE and Personnel Cost Campbell County and Lynchburg Regional Library

Department/Position Title	Total FTE	Total Personnel Cost
Regional Library Executive Staff		
Library Director	1	\$94,310
System-Wide Services Manager	1	\$48,875
Administrative Assistant	1	\$38,561
Total Regional Library Executives	3	\$181,746
Administrative Services		
Administrative Clerk	1	\$35,479
Courier/Delivery	0.5	\$11,313
Total Administrative Services	1.5	\$46,792
Collection Management/Technical Services		
Collection Management/Technical Services Librarian	1	\$46,112
Library Assistant II	1	\$35,692
Library Assistant I	0.5	\$9,220
Total Collection Management/Technical Services	2.5	
Technology Services		
Technology Services Librarian	1	\$46,112
IT Support	1	\$42,796
Total Technology Services	2	\$88,908
Campbell County		
Campbell County Main Library Manager II	1	\$48,875
Timbrook Library Manager II	1	\$48,875
Patrick Henry Memorial Library Manager I	1	\$46,112
Staunton River Memorial Library Manager I	1	\$46,112
Campbell County Youth Services Librarian	1	\$46,112
Library Associate	4.0	\$148,788
Library Assistant II	3	\$82,556
Library Assistant I	5	\$124,831
Page	3.5	\$64,538
Total Staff in Campbell County	20.5	\$656,799
Lynchburg		
Lynchburg Main Library Manager II	1	\$48,875
Downtown/Law Library Associate	1	\$37,197
Lynchburg Youth Services Librarian	1	\$46,112
Library Associate	3.5	\$126,033
Library Assistant II	1	\$27,519
Library Assistant I	4.5	\$112,348

Department/Position Title	Total FTE	Total Personnel Cost
Page	4	\$73,757
Total Staff in Lynchburg	16	\$471,841
Grand Total	46	\$1,549,595

The above table uses health care costs from Region 2000 at \$5,382.36 per year for employer paid premium. The retirement contribution was calculated at 10.92% of salary based on Region 2000 VRS rate.

Table 11. Current Personnel Costs (FY 2013) for Lynchburg and Campbell County Libraries

	Lynchburg	Campbell	Total
Salaries and Wages	\$935,433	\$583,510	\$1,518,943
Employee Benefits	\$342,618	\$179,461	\$522,079
Total	\$1,278,051	\$762,971	\$2,041,022

Includes salaries, wages and all employee benefits offered by the current employer

Estimated Budget

An estimated budget for the regional library was developed using the staffing plan and information about the current non-personnel operating budgets of the two libraries. As shown in Table 12, annual costs for the regional library are estimated to be \$491,522 less than the combined costs of the two libraries. Attachment H shows the current budget for each of the two libraries.

Nearly all savings come from reduced costs for salaries, wages and benefits. A portion of the reduced benefit costs are attributable to using the Region 2000 VRS rate as the assumed rate the regional library would pay instead of the higher rate that Lynchburg is currently paying.

Salaries were assumed to be at the midpoint of Bedford Library System’s ranges because they fall between those of Campbell County and Lynchburg. Most of the operating budgets of the two libraries, like that of virtually every public library, are spent on personnel-related costs. Other operating costs are a minor portion of the budget and present few opportunities for economies of scale.

Table 12. Campbell County and Lynchburg Regional Library Proposed Budget

	Combined Lynchburg and Campbell County Budgets	Regional Library Proposed Budget	Difference
Personnel Services			
Salaries and Wages	\$1,518,943	\$1,248,097	(\$270,846)
Benefits	\$522,079	\$301,498	(\$220,581)
Operating Expenses			
Library Materials	\$290,904	\$290,904	\$0
Programming Supplies and Services	\$5,650	\$5,650	\$0
Building Maintenance (to be provided/paid by Locality owning each building)	\$2,700	\$0	(\$2,700)
Vehicle Operating	\$3,589	\$3,589	\$0
Telecommunications	\$35,387	\$41,750	\$6363
Public Information and Communications	\$0	\$15,000	\$15,000
Computer Equipment	\$5,979	\$50,000	\$44,021
Software Licenses and ILS Software Maintenance / Upgrade Contract	\$20,350	\$40,000	\$19,650
Rentals and Leases			
Property	\$43,500	To be paid by County	
Equipment	\$7,300	\$7,300	\$0
Insurance (Property, Auto, Liability, E&O, Surety Bonds. Property Ins for Buildings and Grounds to be paid by owning locality)	\$13,594	\$6,000	(\$7,594)
Utilities (to be paid by locality owning/leasing building)	\$26,300	\$0	\$0
HR Services (to be provided/paid for by Campbell Co)	\$0	\$0	\$0
Fiscal and Audit Services (to be provided/paid for by Lynchburg)	\$0	\$0	\$0
Professional Services	\$26,500	\$10,500	(\$16,000)
Attorney Services	\$0	\$2,000	\$2,000
Office Supplies and Services (including volunteer costs)	\$53,977	\$51,000	(\$2,977)
Postage, Mailing, Shipping	\$7,843	\$7,800	(\$43)
Memberships / Conferences / Meetings	\$2,943	\$3,000	\$57
Travel, Lodging, Mileage Reimbursements	\$3,350	\$3,350	\$0

	Combined Lynchburg and Campbell County Budgets	Regional Library Proposed Budget	Difference
Subtotal Personnel Services	\$2,041,022	\$1,549,595	(\$491,427)
Subtotal Operating Expenses included in Library budgets	\$536,597	\$536,502	\$95
Total	\$2,651,813	\$2,155,269	(\$491,522)

Note: The Operating Expenditures budgets for Lynchburg and Campbell County do not include all costs of building maintenance, utilities, some telecommunications and some computer and automation costs.

State aid for regional libraries is slightly higher than for single jurisdiction libraries. As Table 13 illustrates, the Library of Virginia estimates that state aid for the regional library would increase by only \$8,318.

Table 13. Estimated Increase in State Aid for Campbell County and Lynchburg Regional Library

	Current State Aid
Campbell County	\$151,872
Lynchburg	\$153,042
Total	\$304,914
State Aid Estimate for Regional Library	\$313,232
Estimated Increase in State Aid	\$8,318

For purposes of this study, Campbell County and Lynchburg are assumed to share the operating costs based on the average of their percentage of total population and the percentage of total circulation by their residents regardless of location of checkout, using the most recent fiscal year data available at the time the annual budget is approved by the Regional Library Board of Trustees for submittal to the localities. A specific cost sharing formula would be included in the contract between the localities that establishes the regional library.

The formula used here is:

$$\text{Locality share} = \% \text{ of population} + \% \text{ of circulation by locality residents} / 2$$

For illustration purposes Table 14 shows how the formula is applied to determine a locality’s cost share.

Table 14. Cost Sharing Percent Campbell County and Lynchburg Library Using FY 2013 Data

Locality	Population	Population Percentage	Circulation	Circulation Percentage	Cost Share Percentage
Campbell County	55,163	41.7%	231,449	32.6%	37.15%
Lynchburg	77,113	58.3%	478,118	67.4%	62.85%

Note: For illustration purposes only. Circulation figures shown are total checkouts by the library, not checkouts to residents of the locality.

Table 15 shows the cost allocation formula applied to the estimated regional library budget.

Table 15. Campbell County and Lynchburg Cost Share Allocations Using 2013 Data

	Allocations
Total Budget	\$2,086,097
Less State Aid	(\$313,232)
Local Funds Total	\$1,772,865
Campbell County Share @ 37.15%	\$658,619
Lynchburg Share @ 62.85%	\$1,114,246

The cost share amount cannot be compared exactly to the current budget and costs because some items, such as utilities and custodial services, may now be included in one or both libraries’ budgets but are not in the proposed budget shown in Table 12 because it is assumed that the locality will pay them directly. The Campbell County Library FY2014 budget excluding state aid is \$884,759. Lynchburg library’s FY 2014 budget excluding state aid is \$1,374,952.

The proposed regional library budget cannot be compared directly to the costs of operating the existing libraries because some of the costs currently in each library’s budget will be borne by the localities. However, it is possible to estimate the savings for each locality based on the projected personnel and benefits budget of the regional library compared to those of the three separate libraries. Table 16 shows the estimated cost reductions for Lynchburg and Campbell County.

Table 16. Campbell County and Lynchburg Regional Library Estimated Cost Savings by Locality

	Lynchburg	Campbell County	Total
Current Personnel Costs	\$1,278,051	\$762,971	\$2,041,022
Percent Cost Share for Regional Library	67.4%	32.6%	100%
Share of Regional Library Personnel Costs	\$1,044,427	\$505,168	\$1,549,595
Cost Savings	\$233,624	\$257,803	\$491,427

Implementation Planning

As indicated previously, creating a new public entity (whether two or more localities are included), is a complicated and time-consuming process. It requires a project team led by a project manager able to commit substantial time to leading implementation until a regional library director is appointed. A detailed implementation plan, with a timeline, budget, and specific tasks assigned to specific people needs to be developed early in the process. A draft plan including major tasks through the recruitment of a library director provided in Attachment F.

Campbell County and Lynchburg administrators or their designees need to develop a contract for approval by both governing bodies. Attachment B identifies major issues to be considered and decisions to be made in the contract. In addition, the contract should become effective prior to the regional library providing services so that many start-up activities can be completed, such as contracts for health insurance, VRS, and other services completed and in effect, staff hired and trained, policies and procedures developed, etc.

The regional library director should be hired well before the regional library begins to function. Because the director will report to the Board of Trustees, Board members should be appointed and take office even sooner. This will enable them to participate in the recruitment process and hiring of the director.

Major implementation steps include developing human resources policies, job descriptions, and salaries and benefits. Consulting assistance may be helpful if the localities do not have resources available to complete this work. Having a budget for start-up activities and costs about nine months prior to the “Go Live” date is a necessity.

Another important implementation decision will be to develop and implement a process for selecting employees of the regional library. Staff

members of the current libraries are understandably concerned about whether they will have a position in the Regional Library as well as what their salaries, benefits, and job duties or assignments to a specific branch will be. Decisions about, for example, whether current employees will be given preference over other applicants, will need to be made and communicated.

A related issue is providing support for the current libraries' employees during the transition period while they experience uncertainty about their employment and face substantial changes in their work (whether or not they become employed by the regional library). The implementation plan should include specific activities and services during the transition and frequent and open communication as well as some change management training for the employees and their managers.

Office space for the regional library's administrative and support services will need to be identified early on. Lynchburg's Main Library is the likely location given that it is the largest building and currently houses these types of services for Lynchburg. Some reconfiguration of back office spaces might be required.

Library users and the general public will also need to learn about the change to a regional library and how it will improve library services. Development of a communications plan that includes public information presentations, press releases, and collateral materials is a best practice. The plan and materials will need to be utilized some months before the regional library begins service.

Ensuring that the regional library can operate using current public library best practices will require capital investment in making interior improvements to implement self-checkout, reduce the number and size of service points, and also require funding to fully utilize RFID technology. Lynchburg's main library circulation is high enough to justify installation of an automated sorting system for handling returned materials.

Pros and Cons

Table 17 summarizes the pros and cons of a regional library that includes Campbell County and Lynchburg.

Table 17. Pros and Cons of Campbell County and Lynchburg Regional Library

Pros	Cons
Reduces duplication of efforts for administrative and support services	The regional library is a new employer and current library staff may not be guaranteed jobs. Salaries, wages, and benefits will be different.
A best practice service model will be delivered throughout the regional library system	Considerable planning and start-up effort is required as well as a start-up budget
Library patrons will benefit from a larger library system with more staff and other resources	Service model requires an investment in technology and some remodeling of buildings by localities
The governing body can focus only on the library and its policies; library can react to opportunities and changes more quickly than as part of a larger organization	Without inclusion of Bedford Library System as part of the regional library, some duplication of administrative and support services and activities continues
Provides cost savings to participating localities	

Summary of Recommendations

Recommendations for each phase of regionalization are made throughout this report. They are summarized below.

Service Sharing

Recommendation 1. Lynchburg should immediately begin planning to participate in the integrated library system (ILS) already shared by Bedford Library System and Campbell County Library.

Recommendation 2. Expand the shared service memorandum of understanding between Bedford Library System and Campbell County to include Lynchburg with language that encourages shared services beyond the ILS and delivery.

Recommendation 3. Lynchburg and Campbell County Main Library should convert from bar code technology to RFID technology to implement best practices in library materials handling.

Recommendation 4. Eliminate the non-resident library card fee and reciprocal fee charged by the City of Lynchburg and Bedford Library System.

Recommendation 5. Expand the delivery system between Bedford Library System and Campbell County to include Lynchburg when it begins using the shared ILS.

Recommendation 6. Hold regular meetings among the three library directors to evaluate shared services and identify additional opportunities for cooperative activities and services.

Forming a Regional Library System with Bedford, Campbell and Lynchburg

Recommendation 7. Create a project team with a project manager able to commit substantial time to leading implementation until a regional library director is appointed as soon as the localities decide to proceed with forming a regional library.

Recommendation 8. Negotiate and approve the regional library contract between the localities early so:

- The Board of Trustees can be appointed and begin functioning;
- A regional library director can be appointed;
- HR policies, procedures and contracts for employee benefits such as health insurance and participation in VRS can be established; and
- Other necessary tasks can be accomplished prior to “Go Live” date.

Recommendation 9. Develop a budget to cover startup costs at least nine months before the “go live” date.

Recommendation 10. Identify office space for regional library administrative and support staff.

Recommendation 11. Decide and communicate to current library employees the process for hiring regional library employees.

Recommendation 12. Support current library employees during the transition period and communicate frequently and openly; provide change management training for employees and their managers.

Recommendation 13. Develop a communications plan that to announce the formation of the regional library to the general public and library users, including how it will improve library services.

Option: Campbell County and Lynchburg Form the Initial Regional Library System; Bedford Library System Participates in Service Sharing and Joins the Regional Library at a Later Date

As planning and implementation of service sharing and a regional library that includes Campbell County and Lynchburg proceeds, the ultimate goal of a regional library that includes all three localities in order to provide the best possible library services at the lowest cost must be kept in mind. The following recommendations are appropriate at the time Bedford County decides to participate and are in addition to those discussed above.

Recommendation 14. Develop a detailed implementation plan to successfully integrate the Bedford Library System and its patrons into the regional system.

Recommendation 15. Revise the regional library contract and seek approval by all three locality's governing bodies.

Recommendation 16. Develop and communicate the process for selecting new employees for the larger regional library.

Recommendation 17. Provide support to Bedford Library System employees during the transition period and offer change management training for those employees and their managers.

Recommendation 18. Provide public information about the expanded regional library and how it will improve library services.

Conclusion

Region 2000 and Bedford County, Campbell County and Lynchburg have done much work over the past several years to study and lay the groundwork for regionalizing library services. The ultimate goal is to have one regional library that provides services of the highest possible quality to more than 200,000 residents in a cost-effective manner.

Previous studies and discussion and analysis by the Working Group as well as the results of this study have steadily developed the concept. The three localities are now well-prepared with information about the benefits of regionalization, the options for moving forward, and specific implementation steps for doing so.

The phased plan, starting with service sharing and working toward a regional library provides the flexibility to move through the steps at a pace that works for each participating locality. An integrated library system (ILS) shared by all three libraries is an essential prerequisite and a building block for forming a regional library. With that in place as early as possible, planning for a regional library with either three or two participating localities can proceed as soon as governing bodies decide to do so.

As managers and elected officials consider making substantial changes in organizations and service models, it can be tempting to ask even more questions. The participants have the information they need to make decisions about moving forward. Questions can be answered and information gathered during the implementation process. Of course more information is needed, but not before action is taken.

Attachment A – Summary of Results of Focus Groups

Management Partners held three focus groups with staff from Bedford County, Campbell County, and Lynchburg libraries on December 10, 2013. A total of 34 individuals participated. A summary of the themes from the three groups is reported below.

1. What do you see as the potential benefits of a regional library system for library users?

Access to Materials and Other Library Resources

- Shared collection
- Better sharing about programming in all regional facilities
- Better availability of materials
- Additional electronic resources
- Ability to share popular programs/achieve better quality through shared program resources
- Access to equipment, meeting rooms and staff

Technology

- Better internet service (hopefully)
- Better website
- Dedicated in-house IT would be beneficial
 - Faster response time to problems
 - Better control over technology and better technology systems
 - Consistent technology among libraries
 - More control over filtering
 - Newer and better hardware/better condition of computers

Efficiencies

- Shared resources might reduce costs (although Bedford and Campbell already share everything except new materials and DVDs)
- Larger budget for branch programs because of economies of scale
- More scheduling possibilities/possible increase in hours
- Convenience (for pickups and returns)
- Fee for a library card would be eliminated
- Potentially shorter transportation time for interlibrary loans

Staff

- More reference staff (ideally one at every branch; however, there was not agreement that every branch needs reference staff)

- More effective network for literacy volunteers and promotion of literacy

Other

- More library awareness and visibility
- Barriers of city/county lines disappear
- Be part of a bigger “neighborhood” but still have autonomy
- Consistency in policies (could be a downside)
- Ownership of buildings (e.g., “my” library)
- New experience with more libraries

2. What do you see as the potential downside of a regional library system for library users?

Access to Materials and Other Library Resources

- Patrons may lose out by not being able to get the books they want (greater competition for resources due to very active and more savvy users in other systems)
- Perception that the other system patrons are taking the resources
- No limits; no rules—many requests could clean the shelves of seasonal materials
- Lynchburg users would have to learn to use the new catalog
- Requests might take longer to get delivered because of expanded geography and user base

Other

- Perception of equity by the public and staff in sharing of resources and facilities
- Some loss of identity may occur
- Loss of staff from downsizing
- Patron needs might be different based on urban/rural communities
- Potentially more layers of governance (one layer currently)
- One size doesn’t fit all—differences in policies/problems/issues

Neutral Comments

- Users don’t know or care where materials come from
- Would need to educate the public

3. What do you see as potential benefits of a regional library system for library staff?

Staff

- Higher pay
- Benefits for part-time staff
- Better distribution of workload (with potential for reduction in some workload)

- Better hiring methods/more flexibility in hiring/faster timing to fill vacancies
- Better career paths/more opportunities for advancement/more full-time opportunities
- More training opportunities
- More opportunities to share staff expertise and equipment; learn from each other
- More independent decision making
- More backup for absences

Technology

- In-house technology staff would be good; better timely service and knowledge base about library needs
- Improved technology, staffing and equipment
- Better website

Services

- Shared cataloging
- Would not have to deal with library card fee
- Better services
- Sharing of programs
- More diversified collection
- Potential for capital improvements to buildings
- Better recognition for library

Financial implications

- More state aid may be available
- Efficiencies from less duplication and potentially larger discounts
- Fewer copies needed system wide (which frees up dollars for other needs)
- Regional library card may cut work (currently Bedford and Campbell users can request the same resource, which results in double work for staff)

4. What do you see as the potential downside of a regional library system to library staff?

Concern about jobs, salaries and benefits

- Will specialized positions stay?
- Will we need to reapply for our jobs? Will we be rehired?
- Will I have a comparable job?
- Will we still be in the Virginia retirement system?
- Will we retain our salaries and benefits?
- Will part-time staff have benefits?
- Will employees be heard and kept up to date?

- Not everyone has library science degree, but people know the jobs; will that be enough?
- Will many more responsibilities be added (for same salary)?
- Currently Lynchburg has more professional positions... concerned about loss of those
- Morale is low
- Will part-time people be able to keep local jobs?
- If programmers traveled, it would result in loss of productive time

Concern about regional system

- Need competent leader with regional experience
- Outsider might be best because there would be no allegiances
- Chain of command may be unclear
- Currently have three diverse systems

Other Issues

- Make it a true regional system—help merge policies, staff, etc.
- Will literacy program still be part of the new library (not always housed in a library)
- Concern that reducing cost is the primary driver for regionalization
- Acquisitions and serial modules are not used by all libraries (and would initially increase costs)
- Concern about loss of autonomy and decision making for individual systems, including selection of materials
- Concern about quality of service
- Concern about loss of sense of team
- Change is always hard
- Public might be upset about staff losses

5. What future changes do you think will affect library service?

Technology

- Technology will continue to change
- More self-checkout
- More online resources will be needed and fewer physical items
- More use of mobile devices
- More collaboration/partnerships with community organizations
- Costly and complicated issues with e-books; need to make it easier for patrons in the future
- Greater/continued use of internet and Wi-Fi in libraries
- Need more training for staff on “gadgets”

- Need for more tech savvy staff to help tech savvy patrons
- Help people use all resources—keep current gadgets as resources and provide platforms for all

Facilities and Services

- More demand for meeting rooms (ideally our meeting rooms will be constantly in use)
- Design facilities to meet the needs of people in the area
- Offer more support services (scanning, notary, etc.)
- Literacy programs create more library users
- Programs for school readiness/early childhood education
- Send staff into the community to help make people more aware of what is being offered/more outreach

Other

- Need to make sure libraries have easy accessibility and are attractive
- Smiling faces at the library – it should be a nonthreatening place to come and learn
- Need marketing to explain what we do and what we have
- Image change is necessary
- Need a strong advocate for the library

Attachment B – Regional Library Governance and Financing Models and Considerations

Code of Virginia (Title 42.1-37, Chapter 2) states, “two or more political subdivisions (counties or cities), by action of their governing bodies, may join in establishing and maintaining a regional free library system under the terms of a contract between such political subdivisions.”

Recently revised contracts for successful regional libraries (the Williamsburg Regional Library, established in 1977, and the Jefferson-Madison Regional Library, established in 1972) serve as model agreements. In both cases the contracts have been revised several times over the years, most recently in 2013.

Governance

Williamsburg: Library operated by a Board of Trustees with 11 members (6 appointed by James City, 4 by Williamsburg and 1 by York County governing bodies). At least one from Williamsburg and James City shall be government representative from senior management. Trustees limited to 2 consecutive 4 year terms.

Jefferson-Madison: Board shall have authority to determine all matters of policy not limited by the contract and all powers vested in such boards by law. 9 member Board, appointed by governing bodies (3 by Charlottesville, 3 by Albemarle County, 1 by Greene County, 1 by Louise County and 1 by Nelson County. Contract goes into some detail about the specific powers and duties of the Board.

Regional Library Decisions

- Total number of Board members
- Number of Board members from each participating locality
- Should at least one Board member from each locality be from its senior management?

Operating Budget Process and Timeline

Williamsburg: In January of each year the Board adopts a proposed budget for the Fiscal Year beginning July 1. Budget is sent to CAO of each Locality. The budget is presented to governing bodies by the Library if requested. In absence of mutual agreement of the localities, the library operating budget for any fiscal year shall not be less than the total operating budget approved for the preceding year.

Jefferson-Madison: By October 15, the Regional Library Director meets with a committee of at least one member of the executive branch of each locality to explain the Library’s anticipated financial requirements for the next fiscal year to discuss potential ways to adequately fund the Regional Library and determine the level of funding that may be available from the localities. The Board submits the annual budget request for the upcoming Fiscal Year by January 15 to

each of the localities and they shall consider the budget request as part of its normal budget process.

Regional Library Decisions

- Timeline for budget
- Process for budget

Operating Cost-Sharing Allocation

Williamsburg: The localities agree, subject to appropriations, to contribute toward the costs of operating the library on the basis of circulation by residents of the localities. Basically, the percentage of circulation for the prior fiscal year attributable to residents of the locality is the percent cost allocation for the locality. [Only a portion of York County, a new participating locality of the library, is served and its share is discounted]. The Library Director reported that there is little variation in percentages from year to year. The Library retains any unspent funds for all sources at year end and uses them for any purpose deemed appropriate by the Board in the best interest of the Library but reports total unspent funds amount to localities.

Jefferson-Madison: All costs of operating the Library shall be designated either a regional cost, Charlottesville-Albemarle cost, or a local cost. The contract lists what is included in each of these. Regional costs include library materials, cataloging and automation, financial management & fiscal agent fees, regional reference services, branch coordination, and system administration. Each locality pays a percentage of the regional costs equal to the percentage of circulation by its residents. Circulation is defined and the percentage used in any year is the average of the prior three years. Year end fund balance not to exceed 5% of the total annual operating budget may be retained by the Library. Amount over 5% will be returned to the localities in proportion to funds contributed. Instead, Board may propose alternative uses for such funds subject to approval of the locality.

Charlottesville-Albemarle costs include the costs of operating the Central Library, Gordon Ave Library and Northside branches, including staffing costs. These costs will be shared by the two localities in proportion to the use of the three branches by their residents. Local costs to be borne by the locality incurring such costs (where the branch is located) include all the costs of operating each of the other branch libraries including staffing.

Regional Library Decisions

- Will there be one service model and service level for the entire region? or
- Will there be centralized administration and support services shared by all but with branch service levels set by each locality?
- What is the metric by which the costs will be shared? (Circulation is used by both; population is another option.)

Capital Budgets

Williamsburg: Capital items are non-recurring items over \$50,000 and are submitted to the Localities as part of their CIP. These include land acquisition, facility renovation, major additions to public buildings, major studies such as engineering related to facilities, and equipment requirements. Capital Budget submissions will be to the locality in which the building is located if it involves an existing or new building or a structural component of a building system, such as an HVAC system. Other projects (e.g., automation system replacement) will be considered for funding under the same formula as the operating budget and submitted to the localities for consideration.

Jefferson-Madison: Non-recurring capital items identified for a participating locality branch library shall be submitted to that locality as part of its CIP. Each locality is responsible for facility capital costs for its library or libraries.

Regional Library Decisions

- Specify capital budget responsibilities
- Specify how capital needs are conveyed and considered by the locality

Ownership of and Responsibility for Facilities

Williamsburg: Localities own present and any future facilities located in their jurisdiction. Any additional locations, land acquisition, expansion and renovation are to be approved, funded and constructed at the sole expense of the locality in which the facility is located. The Contract is also very specific about what exterior and interior maintenance functions are the responsibility of the Library and which are the responsibility of the locality.

Jefferson-Madison: Each locality shall own or lease the library buildings in that locality and maintain property and general liability insurance. The Board will maintain insurance on the library materials, fixtures and equipment in the buildings.

Regional Library Decisions

- Include language about library materials, equipment and furnishings becoming Regional Library's property on effective date of contract
- Address responsibilities of regional library or locality regarding interior and exterior maintenance

Withdrawal from Regional Library

The Code of Virginia requires a library wishing to withdraw to give two year's notice to each participating locality.

Williamsburg: Distribution of assets only address in case of termination of contract, not withdrawal of a locality.

Jefferson-Madison: Withdrawing locality shall keep all library materials permanently assigned to its local branch or branches at time of notice and a pro rata distribution of personal property purchased based on its percentage of contribution for the purchase of such property.

Regional Library Decisions

- Identify withdrawal methods and expectations

Fiscal Agent and HR Services

Williamsburg: The City of Williamsburg is named fiscal agent and may bill the Library not to exceed 1.5% of most recently adopted operating budget excluding salary and benefits. James City provides personnel services for a fee not to exceed 1.5% of the total salary and benefit costs. For purposes of personnel policies only, Library staff is governed by James City’s Personnel Policies and Procedures Manual.

Jefferson-Madison: Charlottesville is named fiscal agent, to include accounting, disbursements, personnel services and maintaining personnel and payroll records, IT services, procurement and purchasing services, and contracting for annual audit. Pay 2% of annual operating budget for services.

Regional Library Decisions

- How will these services be provided?
- Contract or locality?

Term of Contract

Williamsburg: Five years to continue thereafter until discontinued by action of any of the localities (i.e., withdrawal)

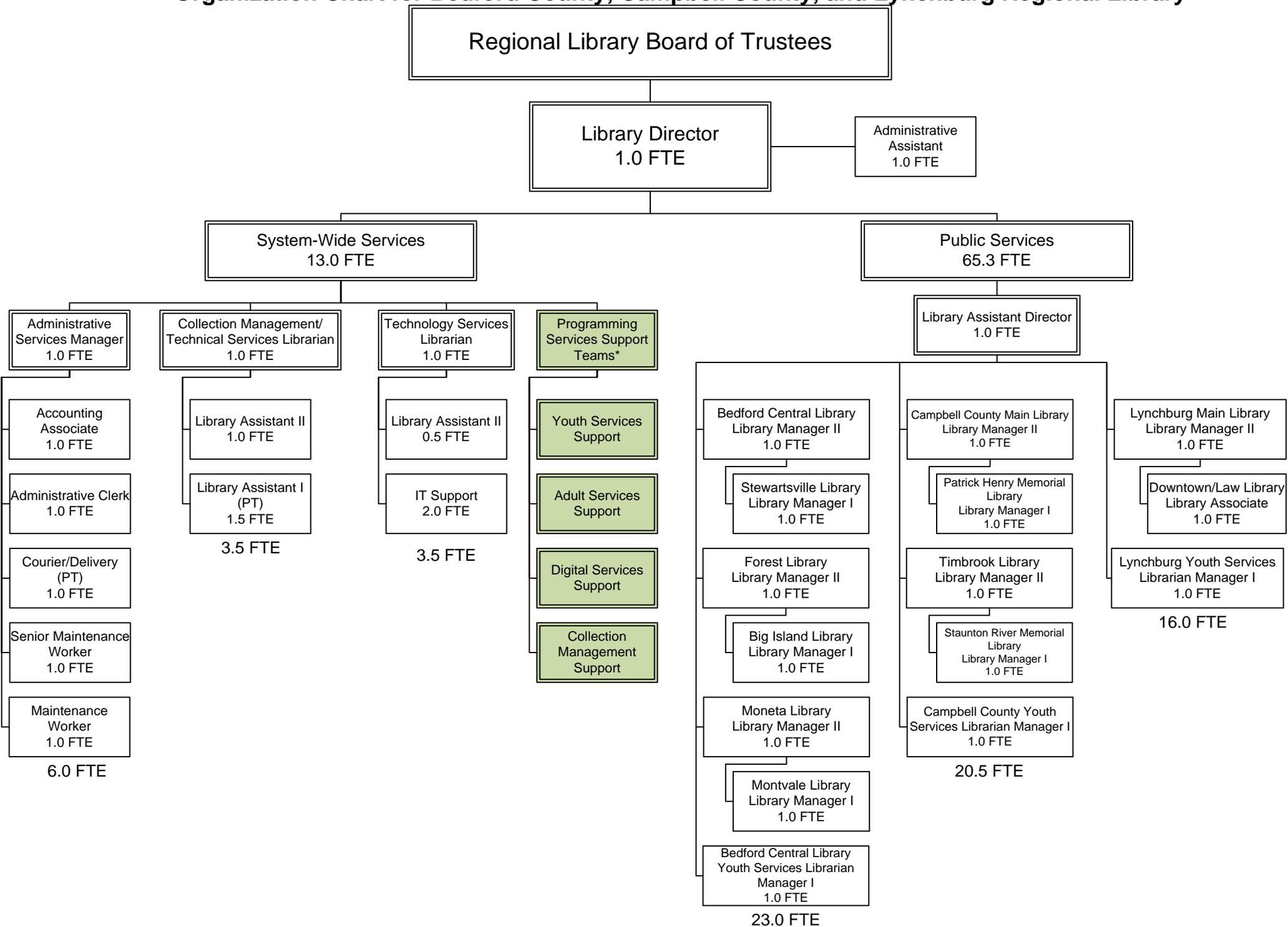
Jefferson-Madison: No term of contract. A Regional Library Agreement Review Committee shall be convened and meet no less than every five years. It will also convene if there is a request from a new locality to become a member to review and make recommendations on it.

Regional Library Decisions

- Will a term of contract be designated?
- Will there be a formal contract review process?

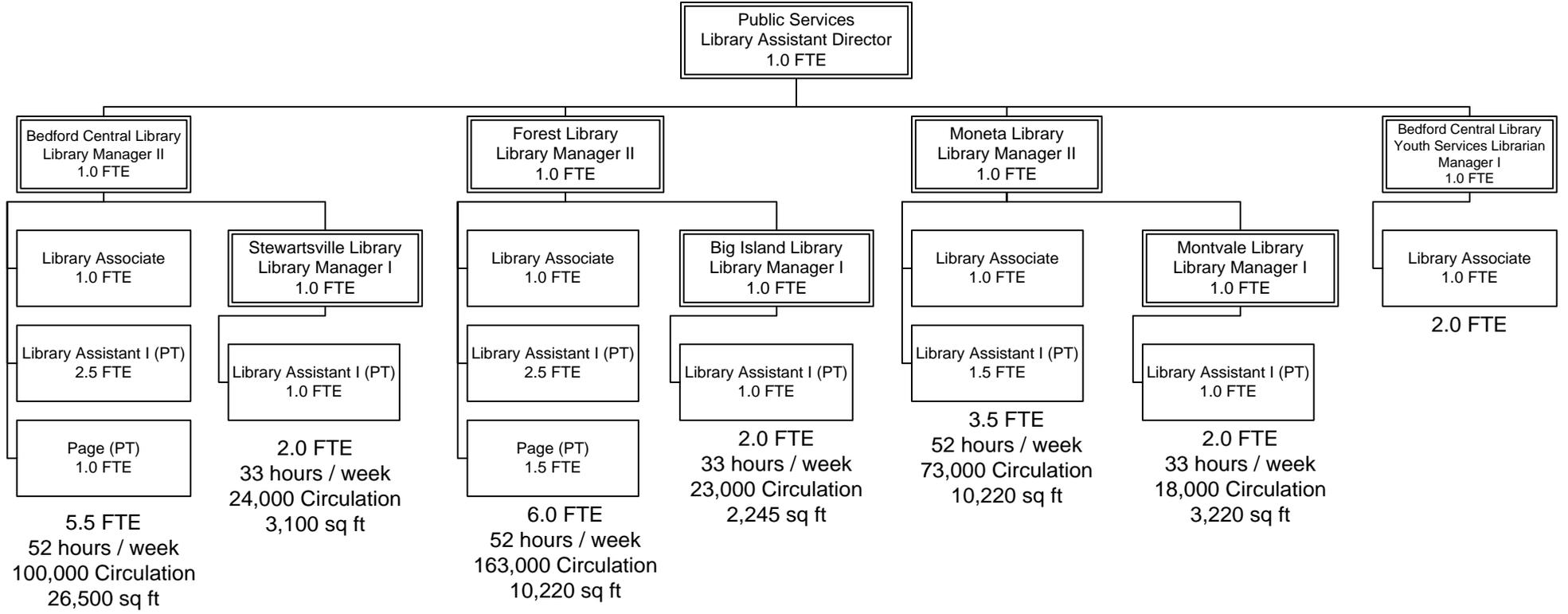
**Attachment C – Organization Chart for a Regional Library that
includes Bedford, Campbell, and Lynchburg**

Organization Chart for Bedford County, Campbell County, and Lynchburg Regional Library

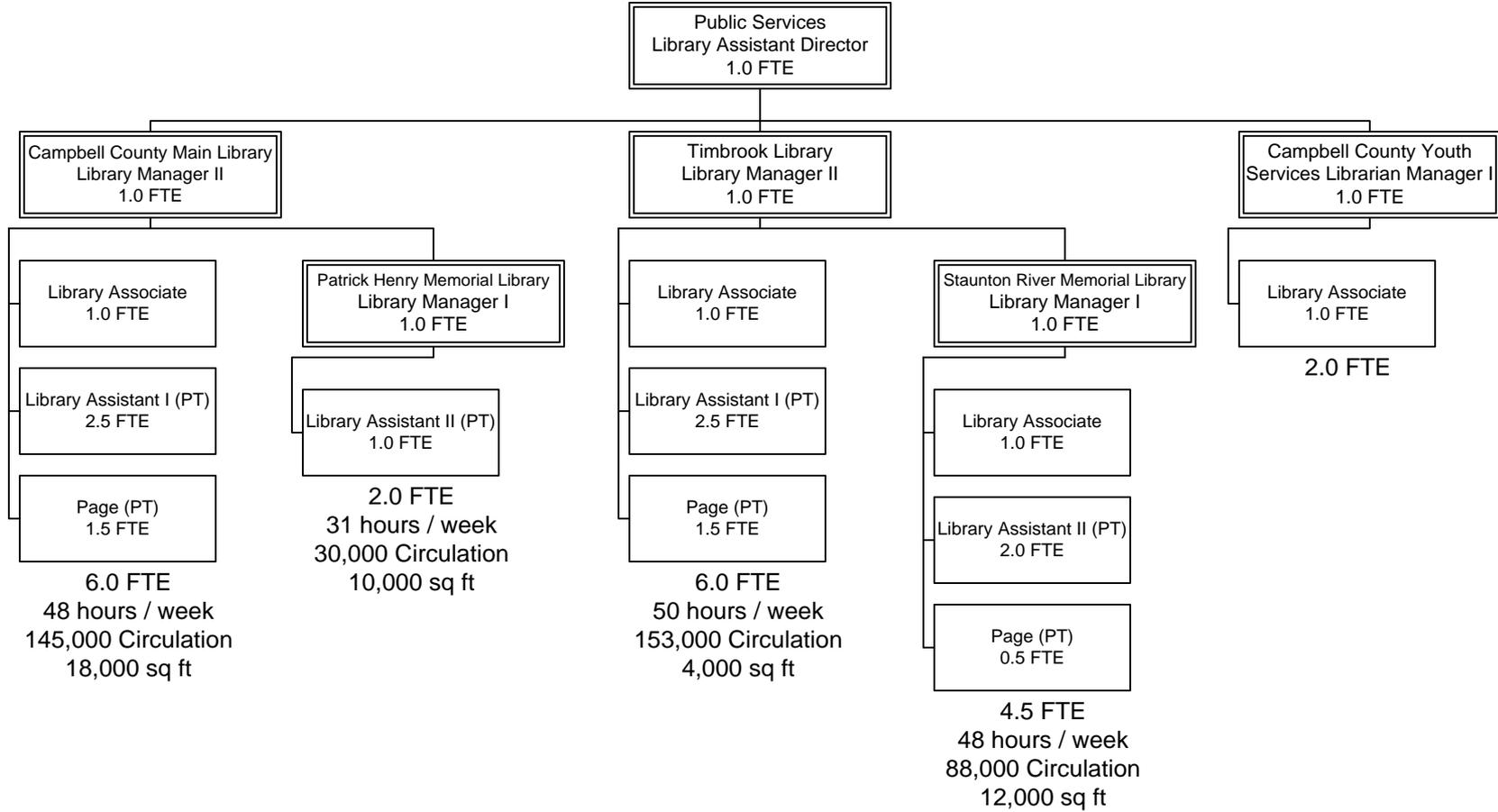


*Note: Systemwide Programming Services Support will be provided by a team supported by the Director or Assistant Director

Organization Chart for Bedford County, Campbell County, and Lynchburg Regional Library

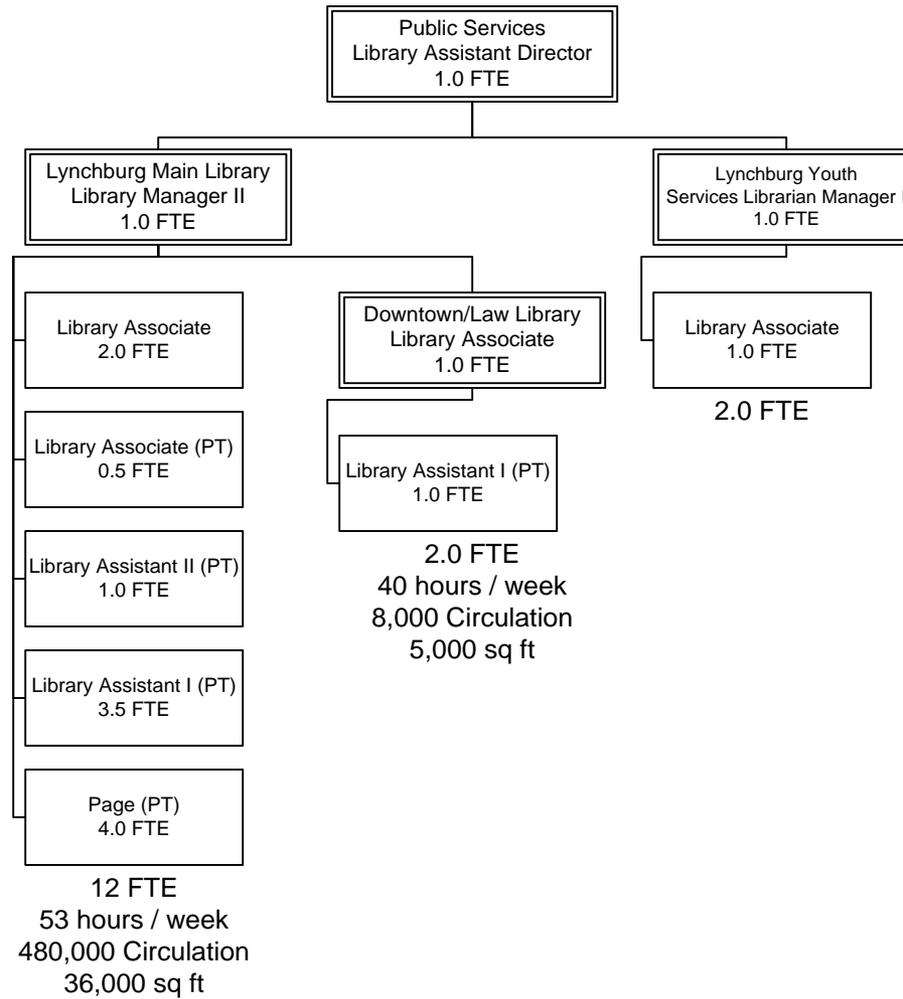


Attachment C: Organization Chart for Bedford County, Campbell County, and Lynchburg Regional Library



Attachment C:

Organization Chart for Bedford County, Campbell County, and Lynchburg Regional Library



Attachment D – Bedford Library System Position Descriptions for Library Assistant through Librarian III

BEDFORD PUBLIC LIBRARY SYSTEM

POSITION DESCRIPTION

Job Title: Library Manager

Grade:

Starting Salary:

Reports to: Library Director

Supervises: Various

The class specification should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

I. POSITION SUMMARY

Provides friendly public service to library patrons. Oversees the daily operations of the library. Participates in all circulation, reference, and readers advisory functions. Selects adult, young adult and juvenile books for the library and suggests A/V and periodical purchases. Plans and implements programming for children and adults. Works with the community and community groups such as schools, civic groups, and businesses. Performs supervisory and personnel functions for the library staff including performance appraisals. Oversees maintenance of the building. Uses and teaches staff and public how to use the automated system and electronic resources.

II. MAJOR JOB RESPONSIBILITIES

Supervises and participates in all circulation functions, to include charging and discharging materials, processing intra library and interlibrary loans, holds and patron registrations.

Performs all supervisory and personnel functions to include interviewing, recommending candidates for hire, training, scheduling library desk coverage, assigning daily and ongoing responsibilities, monitoring and evaluating work; informs staff of changes in policy and procedures and retrain and/or reassigns, as needed. May be responsible for recruiting, scheduling, and training volunteers.

Supervises and participates in all reference functions including patron interviews; assists patrons and trains staff in locating and utilizing library materials, services, and equipment, including the use of the Internet and other electronic resources; works with library system staff and other agencies to obtain requested information.

Manages the cash flow of fees, fines, donations and sale items.

Participates in functions of collection development to include selecting print materials; weeding/discarding; assessing donations for possible accession or sale; maintaining collection; and recommending A/V and periodical purchases.

Plans, develops, and implements various programs to promote the library in the community, such as weekly preschool story times, speaking at school functions, library orientations, summer reading programs; maintains community bulletin boards and handout displays; prepares promotional printed materials.

Prepares reports, documents, and correspondence related to branch library matters; maintains accurate library, patron and personnel records, as well as, circulation, programming and reference statistics.

Manages the organization and accurate display of the collection, including routine shelf reading for correct order, overdues, repairs, and weeding as well as assessment of space needs.

Makes operational and special budget recommendations; maintains adequate inventory of office and custodial supplies.

Serves as liaison to community groups, including Friends of the Library, area schools, area garden clubs, women's clubs, and local government. Speaks on library activities and issues to local groups, when requested. Schedules groups wishing to use library facilities. Attends meetings of the Friends Board.

Oversees maintenance and safety of the library building: including communicating with library administration, appointed officials, and maintenance or custodial staff. Contacts appropriate agencies, staff or outside personnel to take care of emergency building problems. Maintains a safe environment for staff and patrons. Programs and maintains security codes for building alarm system. Responds to alarms after hours and is "on call" all hours for safety and security issues for the branch.

Responsible for the physical building, and overall appearance of the library and grounds, responsible for alerting Director and maintenance supervisor to any repairs, safety issues or improvements needed.

Oversees the maintenance of the library equipment and machinery, including troubleshooting problems, recommending repair and replacement, and training staff.

Responds to and resolves patron and staff problems, needs, complaints, and suggestions in a courteous manner and refers questions, as needed.

Attends appropriate library staff meetings, continuing education opportunities, workshops, and professional conferences.

III. MINIMUM QUALIFICATIONS

Education & Experience

Bachelor's Degree required, ALA approved MLS degree preferred. Progressively responsible professional experience.

Certifications and Licenses

Valid State of Virginia driver's license.

IV. KNOWLEDGE, SKILLS AND ABILITIES

Strong written and oral communication skills. Strong interpersonal skills interacting with other staff, patrons and outside contacts. Professional knowledge of library practices and procedures. Knowledge of collection development methods and procedures and skill in selecting materials from review sources; knowledge of weeding/discarding methods and procedures. Knowledge of library circulation procedures; ability to interpret guidelines and explain procedures to subordinates and/or members of the public.

Demonstrated judgment and decision-making ability. Ability to accommodate frequent interruptions and multiple tasks. Ability to read, speak, write and comprehend English.

The class specification should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

BEDFORD PUBLIC LIBRARY SYSTEM

POSITION DESCRIPTION

Job Title: Technical Services Librarian

Grade: 7

Starting Salary:

Reports to: Library Director

Supervises: Technical Services Department

I. POSITION SUMMARY

The Technical Services Librarian is responsible for the overall operations of the Technical Services Department. Participates in other management related duties, as required and reports to the Library Director.

II. MAJOR JOB RESPONSIBILITIES

Department Head, Technical Services

Supervise and evaluate the technical services department consisting of two part-time staff. Maintain efficient workflow in the department and set department goals and priorities. Recommends the adoption of bibliographic maintenance standards and authorities in an automated environment, develops procedures for processing all library materials. Oversees, supervises, and assists in entering library materials into the database in accordance with the MARC standard. Work with administration to manage acquisitions schedules, liaison with acquisitions vendors and perform supply ordering for the department. Assists in preparing the annual budget, particularly as it relates to technical services needs. Attends Department Heads meetings. Coordinates special projects with other departments and/or staff.

Head Cataloger

Perform all current duties.

Management Team

Participate in committee and board meetings to develop library policies, procedures, budgets, and special projects. Committees served: Collection Development, System wide planning, Sunshine Fund

Other

Web page development, updates, and maintenance. Assist Technology Librarian in library automation database administration, as needed. Evaluate new technologies to improve technical services department efficiencies. Attends professional and community meetings, workshops, and conferences. Maintains a working knowledge of contemporary issues, trends, and technology in the library profession.

III. MINIMUM QUALIFICATIONS

Education & Experience

ALA accredited Master's Degree in Library Science.

IV. KNOWLEDGE, SKILLS AND ABILITIES

Strong written and oral communication skills. Strong interpersonal skills interacting with other staff, patrons and outside contacts. Professional knowledge of library practices and procedures, particularly as it relates to cataloging standards and practices using AACR2 and USMARC, Dewey Decimal classification, authority control, acquisitions procedures, and processing of library materials. High-level of computer literacy. Excellent organizational and time management skills. Attention to detail and accuracy in all phases of work. Demonstrated judgment and decision-making ability. Ability to accommodate frequent interruptions and multiple tasks.

The class specification should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

BEDFORD PUBLIC LIBRARY SYSTEM

POSITION DESCRIPTION

Job Title: Library Services Librarian

Grade: 9

Starting Salary:

Reports to: Library Director

Supervises: Library Services Department

I. POSITION SUMMARY

Provides friendly, positive public service to library patrons. The Library Services Librarian is responsible for all areas of the Central Library's Library Services Department and coordination of reference information services and adult materials selection for the library branches. Responsible for promoting and marketing information resources and adult programs. Provides reference service to all ages. Participates in other management related duties, as required and reports to the Library Director.

II. MAJOR JOB RESPONSIBILITIES

Department Head, Library Services

For the Library Services Department at Central, performs all supervisory and personnel functions to include interviewing, recommending candidates for hire, training, scheduling LS desk coverage, assigning daily and ongoing responsibilities, monitoring and evaluating work; informs staff of changes in policy and procedures. Selects adult print materials for the Central Library, performs weeding/discarding; assessing donations for possible accession or sale; maintaining collection; and recommending A/V and periodical purchases. Oversees adult print materials selecting by the branch managers. Provides reader's advisory for all age groups, but particularly adults. Provides instruction on the use of the public computers. Assists patrons of all ages with both ready reference and in-depth reference questions. Helps to cover the YS desk during busy periods or as needed.

Information Services, System-wide

Serves as an information resource for the branch managers in their daily duties. Coordinates readers advisory projects and materials and provides guidance or additional interpretation for Library policies and procedures, as needed. Represents the Library system at community events.

Management Team

Participate in committee and board meetings to develop library policies, procedures, budgets, and special projects. Maintains a working knowledge of contemporary issues, trends, and technology in the library profession. Committees served: Collection Development, System wide planning.

III. MINIMUM QUALIFICATIONS

Education & Experience

ALA accredited Master's Degree in Library Science. Previous supervisory experience preferred.

Certifications and Licenses

Valid State of Virginia Driver's License

IV. KNOWLEDGE, SKILLS AND ABILITIES

Strong written and oral communication skills. Ability to read, speak, write, and comprehend English. Strong interpersonal skills interacting with other staff, patrons and outside contacts. Ability to direct the work of professional and paraprofessional personnel.

Professional knowledge of library practices and procedures, particularly as it relates to readers advisory, copyright issues, privacy issues and professional standards of conduct. Knowledge of adult literature and age appropriateness of literature in both print and other formats.

Knowledge of the principles, practices, and procedures of material selection and de-selection.

Knowledge of basic computer applications and software. Knowledge of various office and library equipment.

Knowledge of reader's advisory techniques and information seeking behavior. Ability to perform a reference interview.

Ability to analyze professional and departmental problems and resolve them or make recommendations for their resolution.

Excellent organizational and time management skills. Demonstrated judgment and decision-making ability.

Ability to accommodate frequent interruptions and multiple tasks.

Ability to interpret library objectives and policies to staff, community groups, and the general public

This class specification should not be interpreted as all inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

BEDFORD PUBLIC LIBRARY SYSTEM

POSITION DESCRIPTION

Job Title: Youth Services Librarian

Grade: 9

Starting Salary:

Reports to: Library Director

Supervises: Youth Services Department

I. POSITION SUMMARY

Provides friendly, positive public service to library patrons. The Youth Services Librarian is responsible for all areas of the Central Library Youth Services Department and coordination of juvenile and young adult programming and materials selection for the library branches. Responsible for promoting and marketing youth related materials and programs. Provides reference service to all ages. Participates in other management related duties, as required and reports to the Library Director.

II. MAJOR JOB RESPONSIBILITIES

Department Head, Youth Services

For the Youth Services Department at Central, performs all supervisory and personnel functions to include interviewing, recommending candidates for hire, training, scheduling YS desk coverage, assigning daily and ongoing responsibilities, monitoring and evaluating work; informs staff of changes in policy and procedures. Selects juvenile and young adult print materials for the Central Library, performs weeding/discarding; assessing donations for possible accession or sale; maintaining collection; and recommending A/V and periodical purchases. Oversees juvenile and young adult print materials selecting by the branch managers. Provides reader's advisory for children, teens, parents and teachers. Provides instruction on the use of the juvenile computers. Assists patrons of all ages with both ready reference and in-depth reference questions. Helps to cover the LS desk during busy periods or as needed.

Programming, System-wide

Coordinates and plans annual summer reading program for youth and young adults. Plans and implements special programs for youth and young adults throughout the year at all locations (such as National Library Week or Children's Book Week or Roanoke Reads). Serves as a program resource for the branches. Represents the Library system at school and community events.

Management Team

Participate in committee and board meetings to develop library policies, procedures, budgets, and special projects. Maintains a working knowledge of contemporary issues, trends,

and technology in the library profession Committees served: Collection Development, System wide planning, Sunshine Fund.

III. MINIMUM QUALIFICATIONS

Education & Experience

ALA accredited Master's Degree in Library Science. Previous supervisory experience preferred.

Certifications and Licenses

Valid State of Virginia Driver's License

IV. KNOWLEDGE, SKILLS AND ABILITIES

Strong written and oral communication skills. Ability to read, speak, write, and comprehend English. Strong interpersonal skills interacting with other staff, patrons and outside contacts. Ability to direct the work of professional and paraprofessional personnel.

Professional knowledge of library practices and procedures, particularly as it relates to juvenile and YA service areas. Knowledge of children's literature and age appropriateness of literature in both print and other formats.

Knowledge of the principles, practices, and procedures of material selection and de-selection.

Knowledge of basic computer applications and software. Knowledge of various office and library equipment.

Ability to develop imaginative and practical public service programs. Skill in creating and presenting dramatic presentations/programs to children that maintain their interest, deliver a message and promote reading and library use.

Knowledge of childhood development and education principles and practices relevant to delivering a suitable message to children of varying backgrounds

Ability to analyze professional and departmental problems and resolve them or make recommendations for their resolution.

Excellent organizational and time management skills. Demonstrated judgment and decision-making ability.

Ability to accommodate frequent interruptions and multiple tasks.

Ability to interpret library objectives and policies to staff, community groups, and the general public

This class specification should not be interpreted as all inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

**BEDFORD PUBLIC LIBRARY SYSTEM
POSITION DESCRIPTION**

JOB TITLE: Library Associate

REPORTS TO: System Library Manager or Central Department Head

SUPERVISES:

DEPARTMENT/LOCATION: Various

I. Position Summary:

Provides friendly, positive public service to library patron. Performs various paraprofessional and some beginning level professional duties. May serve as assistant to the department head or library manager to include supervising and monitoring the day-to-day operations of the department or library in the absence of or under the direction of the department head or library manager.

II. Major Job Responsibilities (All responsibility may not be performed by all incumbents:

In manager/department heads absence interprets and assures the implementation of official library policy.

Assists in training staff and volunteers. Supervises library volunteers. In manager's absence, manages day to day operations of the branch.

Responds to complaints in the manager/department heads absence and reports on the resolution or nonresolution of the problem.

Answers general questions and reference questions in person, by telephone or email and conducts or assists the patron in conducting the necessary research.

Assists patrons in accessing and selecting library materials and effectively utilizing all library services including the PAC and self-check out.

Assists patrons in accessing information both in hard copy and on the computer including web and database searches.

Assists patrons with basic computer usage, including word processing, navigating the Internet, email, printing, filling out forms and other tasks.

May plans and presents programs for children and adults.

Participates in a full range of circulation desk duties including issuing library cards, charging and discharging materials, reserving books, collecting fines, emptying book drop, faxing, copying, processing inter-library loans, scheduling the library facilities, and answering the phone. Prepares and routes materials, holds for patrons. Performs various opening/closing procedures. Oversees computer use registration and insures that patrons comply with Internet Usage Policy.

Plans and prepares displays, bulletin boards and bibliographies to market the library collection.

May manage interlibrary loan requests including location searches, requests, and returns. Maintains ILL statistics and records.

May manages MP collection.

Supervises library shelvers and volunteers.

Performs various opening/closing procedures for the public services; counts money and balances money transaction sheets.

May manage overdue notices, fee collections or coordinate with Library's collection agency.

May repair library materials or assist with maintaining the Library's collection.

Manages Library's café.

Performs other related work as required.

III. Minimum Qualifications Required:

Education and Experience:

Bachelor's degree required, at least one year experience as a library paraprofessional preferred.

IV. Knowledge, Skills and Abilities:

Knowledge of library materials and services.

Ability to communicate clearly and effectively orally and in writing.

Ability to follow oral and written instructions, to work with minimal supervision and to use discretion in decision making.

Ability to prioritize tasks

Ability to supervise subordinate staff including training, assigning tasks, motivating, monitoring and evaluating employees.

Ability to operate library computer systems and databases.

Ability to use various digital devices including but not limited to e-readers, smart phones, ipads, notebooks and laptops.

Skill in searching the Internet.

Familiarity with social media sites including but not limited to Twitter, Facebook and You Tube

Ability to use common word processing and graphics programs.

Ability to read, speak, write and comprehend English.

Ability to lift 25 pounds.

The class specification should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

BEDFORD PUBLIC LIBRARY SYSTEM

POSITION DESCRIPTION

JOB TITLE: Library Assistant I or II

REPORTS TO: Department Head or Branch Librarian

SUPERVISES:

DEPARTMENT/LOCATION: Various

I. POSITION SUMMARY:

Provides friendly, positive public service to library patrons. Performs various clerical and patron services functions to include checking materials in/out of library and collecting fines; processing patron registrations, processing holds for local patrons and holds in transit to branches; answers general questions and directs patrons to appropriate library services

II. MAJOR JOB RESPONSIBILITIES

Checks materials in/out of circulation, assists library patrons with self-checkout where applicable, inspects returned materials and applies fines for damaged or overdue materials; updates patron's records

Performs various opening/closing procedures for patron services; counts money and balances money transaction sheets, and prepares reports

Answers general questions and basic reference questions in person and on the telephone, directing patrons to appropriate departments and services when necessary

Prepares and routes materials, holds for patrons, and overdue notices

Assists in the operation of library equipment and in locating materials.

Assists patrons with basic computer usage, including word processing, navigating the Internet, email, printing, filling out forms, and other tasks. Oversees computer use registration and insures that patrons comply with Internet Usage Policy. May plan, prepare and present programs for children and/or adults.

May manage MP collection and/or periodical collection

Schedules library facilities and interprets meeting room policy for patrons.

Plans and prepares bulletin boards, displays and bookmarks to market the library collection

May assist with sorting/shelving of books and conducting shelf searches when required.

Does minimal repair of books, replaces broken cases, applies corrected labels

May select and deliver materials for homebound patrons. Contacts area services for aged to advise about and schedule services for homebound patrons. Plans, prepares and presents programs at area nursing homes and for seniors groups

Performs other related work as required.

III. MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:

High school diploma or G.E.D. and one-year experience performing clerical functions.

Knowledge, Skills, and Abilities:

Basic knowledge and/or familiarity with library materials and services

Ability to operate library computer systems and databases

Skill in organizing and maintaining various files, records, and general library information alphabetically, numerically, or by any other adopted classification

Skill in communicating clearly and effectively both orally and in writing

Ability to learn and apply the Dewey Decimal System

Ability to follow written and oral instructions with limited supervision

Ability to effectively serve and assist the public

Ability to read, speak, write and comprehend English

Ability to spend five or more hours daily at a computer screen; stooping, bending, lifting, reaching, stair climbing, plus ability to lift 25 pound bags/boxes of books and materials

The class specification should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification.

Attachment E – Current Operating Budgets for Lynchburg, Bedford Library System and Campbell County Libraries

	Lynchburg FY 2014 Amended Budget	Bedford Library System FY 2014 Adopted Budget	Campbell County FY 2014 Amended Budget
Personnel Services			
Salaries and Wages	\$935,433	\$896,728	\$583,510
Benefits	\$342,618	\$205,585	\$179,461
	Does not include \$60,713 IT Dept. Allocated Cost		
Operating Expenses			
Library Materials	\$172,693	\$179,297	\$118,211
Programming Supplies and Services	\$2,700	\$7,500	\$2,950
Building and Grounds Maintenance	\$0 Provided/Paid by City	\$84,000	\$2,700 Remainder Provided/Paid by County
Vehicle Operating	\$1,489	\$4,750	\$2,100
Telecommunications	\$1,018 Plus \$13,524 in City IT	\$67,000	\$20,875
Public Information and Communications	\$0 Provided/Paid by City	\$750	\$0
Computer Equipment	\$3,479 Plus \$26,975 in City Tech Fund	\$34,500	\$2,500
Software Licenses and ILS Software Maintenance / Upgrade Contract	\$37,385	\$50,000	\$0 \$13,000 Included in County IT Budget
Rentals and Leases			
Property	\$0	\$0	\$43,500
Equipment	\$4,800	\$8,500	\$2,500
Insurance (Property, Auto, Liability, E&O, Surety Bonds)	\$0	\$12,399	\$325
Utilities	Provided/Paid by City	\$115,000	\$26,300

	Lynchburg FY 2014 Amended Budget	Bedford Library System FY 2014 Adopted Budget	Campbell County FY 2014 Amended Budget
Fiscal and Audit Services	\$0 Provided/Paid by City	\$42,000	\$0 Provided/Paid by County
Professional Services	\$0	\$6,000	\$26,500 (\$22,000 for share of R2000 study)
Attorney Services	\$0 Provided/Paid by City	\$500	\$0 Provided/Paid by County
Office Supplies and Services (including Volunteer costs)	\$20,350	\$20,602	\$16,592
Postage, Mailing, Shipping	\$4,425	\$3,250	\$3,418
Memberships / Conferences / Meetings	\$604	\$6,600	\$2,339
Travel, Lodging, Mileage Reimbursements	\$500	\$8,000	\$2,850
Subtotal Personnel Services	\$1,278,051	\$1,102,313	\$762,971
Subtotal Operating Expenses in library budget	\$249,443	\$650,648	\$273,660
Total Budget	\$1,527,494	\$1,752,961	\$1,036,631

Attachment F –Implementation Plans

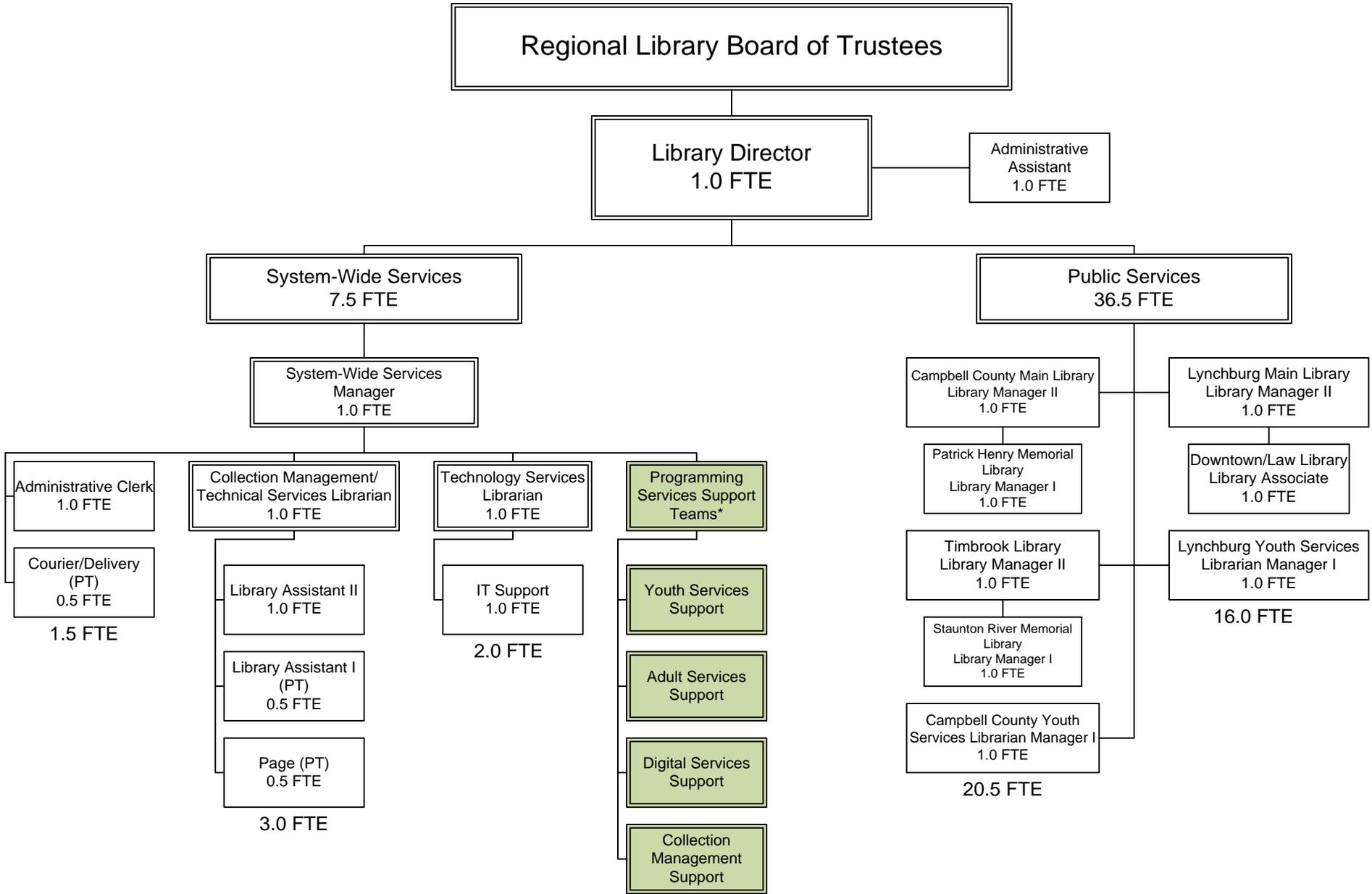
Shared Services Implementation Plan		
Date	Task	Responsible Party
May 1, 2014	Lynchburg gives one-year notice of intent to withdraw from current shared ILS agreement	Marilyn Martin
May 1 to June 15	Draft modified shared services agreement between Bedford Library system and Campbell County to include Lynchburg, including cost sharing.	Library Directors
May 15 to June 30	Negotiate changes in vendor contract and costs of adding Lynchburg, including any new features to be added	Library Directors
June 15 to June 30	Sign shared services agreement	Locality administrators
July	Develop migration plan for Lynchburg	Marilyn Martin with assistance from other 2 directors
August to September	Library staffs review circulation policies (loan periods, renewal limits, borrowing of new books by patrons of other libraries etc.) for implementation of shared ILS	Library Directors
October to March	Migration activities continue, i.e., testing of features and migrating data, databases cleanup, etc.	Marilyn Martin
January to April	Lynchburg Main building prepared for new equipment and self-service check-out model	Marilyn Martin
April	Lynchburg staff trained to use ILS	Marilyn Martin
May 1	Go Live Date	Marilyn Martin

Regional Library Implementation Plan			
Weeks From Start	Major Tasks	Responsible Party	Budget required
1	Select Project Manager	Administrators or their designees	\$42,000 (Independent contractor for 11 month contract, total of 800 hours plus mileage)
2-12	Prepare Regional Library Contract	Locality Administrators with Project Manager	
13-17	Present Regional Library Contract to Governing Bodies for Approval	Locality Administrators	
18	File notice of Intent to form Regional Library to Library of Virginia	Project Manager	
18-24	Appoint Library Board of Trustees	Governing Bodies	

Regional Library Implementation Plan			
Weeks From Start	Major Tasks	Responsible Party	Budget required
28	Hold first Board meeting to review draft bylaws, library director position description and announcement	Project Manager	
29	Draft a contract (or RFP) for HR consultant to draft personnel policies, job descriptions, salaries and wages benefits, hiring processes	Project Manager	
32	Hold second Board Meeting to approve items above	Project Manager	
32-37	Begin Library Director recruitment	Project Manager	
38-42	Interview candidates, select individual and negotiate contract	Project Manager	
40	HR Consultant Contract Approved by Library Board	Project Manager	\$15,000 (for 300 hours)
46	Library Director begins work	Library Board	\$63,000 for 8 months
40-60	HR consultant drafts personnel policies, job descriptions, salaries and wages benefits, hiring processes	Project Manager/ Library Director	
50	Hire Administrative Assistant	Library Director	\$22,500 for 7 months
51-53	Develop budget	Library Director	
54	Present FY 2017 budget to Library Board for approval; then present to localities for their approval	Library Director	
78 (18 months)	Begin Regional Library operations (NOTE: actual dates will be based on localities funding)		

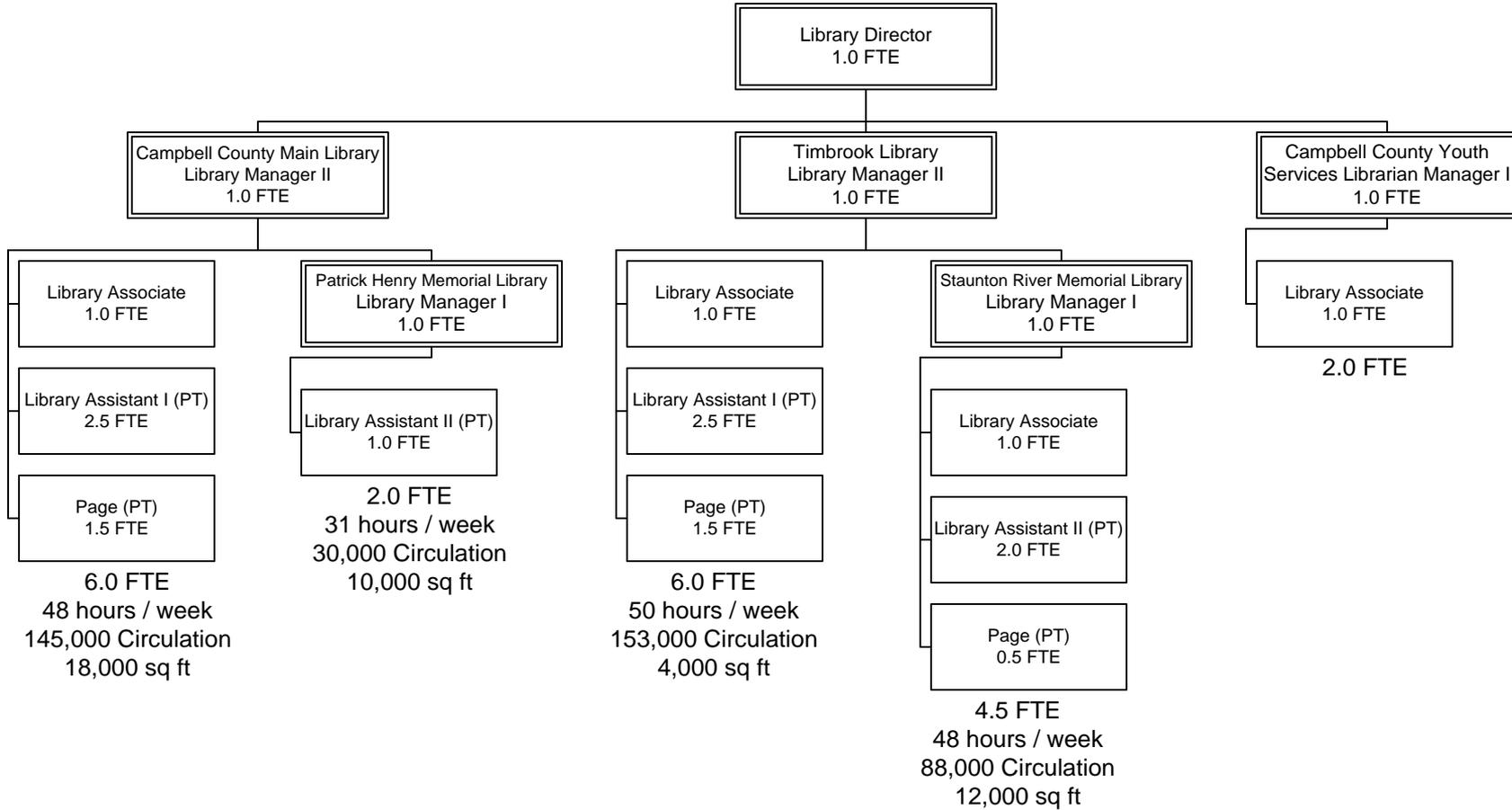
Attachment G – Organization Chart for a Regional Library with Campbell County and Lynchburg

Attachment G: Organization Chart for Campbell County and Lynchburg Regional Library

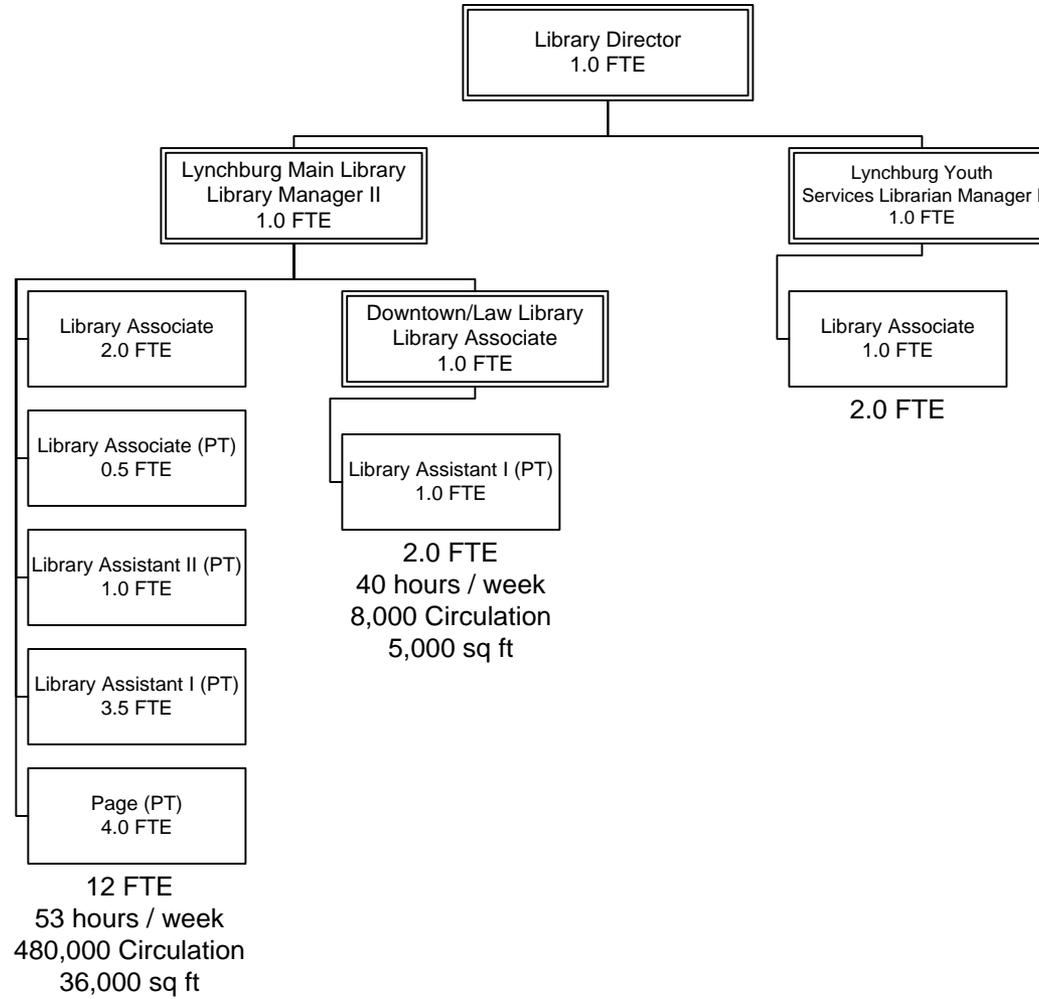


*Note: Systemwide Programming Services Support will be provided by a team supported by the Director or Assigned Manager

Attachment G: Organization Chart for Campbell County and Lynchburg Regional Library



Attachment G: Organization Chart for Campbell County and Lynchburg Regional Library



Attachment H – Current Operating Budgets for Campbell County and Lynchburg Libraries

	Lynchburg FY 2014 Budget	Campbell County FY 2014 Budget
Personnel Services		
Salaries and Wages	\$935,433	\$583,510
Benefits	\$342,618	\$179,461
	Does not Include \$60,713 IT Dept. Allocated costs	
Operating Expenses		
Library Materials	\$172,693	\$118,211
Programming Supplies and Services	\$2,700	\$2,950
Building and Grounds Maintenance	\$0 Provided/Paid by City	\$2,700 Remainder Provided/Paid for by County
Vehicle Operating	\$1,489	\$2,100
Telecommunications	\$14,542	\$20,875
Public Information and Communications	\$0 Provided/paid by City	\$0
Computer Equipment	\$3,479 Plus \$26.975 in City Tech Fund	\$2,500
Software Licenses and ILS Software Maintenance / Upgrade Contract	\$20,350	\$0 Paid for and included in County IT Dept. budget (\$13,000)
Rentals and Leases		
Property	\$0	\$43,500
Equipment	\$4,800	\$2,500
Insurance (Property, Auto, Liability, E&O, Surety Bonds)	\$0 Provided/paid by City	\$325 in Library Budget Remainder provided/ paid by County
Utilities	\$0 Provided/paid by City	\$26,300
HR Services	\$0 Provided/paid by City	\$0 Provided/Paid by County
Fiscal and Audit Services	\$0 Provided/paid by City	\$0 Provided/Paid by County
Professional Services	\$0	\$26,500 Includes \$22,000 for share of R2000 Regional Library Study
Attorney Services	\$0 Provided/Paid by City	\$0 Provided/Paid by County

	Lynchburg FY 2014 Budget	Campbell County FY 2014 Budget
Office Supplies and Services (including Volunteer costs)	\$37,385	\$16,592
Postage, Mailing, Shipping	\$4,425	\$3,418
Memberships/Conferences/Meetings	\$604	\$2,339
Travel, Lodging, Mileage Reimbursements	\$500	\$2,850
Subtotal Personnel Services	\$1,278,051	\$762,971
Subtotal Operating Expenses in Library Budgets	\$262,967	\$273,535
Total Budget	\$1,541,018	\$1,036,506