

## MEMORANDUM

TO: Chair and Orange County Board of Commissioners  
Chapel Hill Town Council  
Carrboro Board of Alderman  
Hillsborough Town Board of Commissioners

FROM: Frank Clifton, County Manager  
Roger L. Stancil, Town Manager

CC: Mayor Foy, Mayor of Chapel Hill  
Mark Chilton, Mayor of Carrboro  
Tom Stevens, Mayor of Hillsborough  
Steve Stewart, Town Manager of Carrboro  
Eric Peterson, Town Manager of Hillsborough

SUBJECT: Information for the November 30, 2009 Orange County Assembly of Governments (AOG) Meeting regarding library services in Orange County

DATE: November 30, 2009

### INTRODUCTION & PURPOSE

At its March 2009 meeting, the Assembly of Governments requested that the managers of Orange County and Chapel Hill prepare a report identifying possible library service collaboration for Orange County. The managers charged their library directors to 1) identify alternatives for library services in Orange County, 2) work within County and Town governments to address specific issues and related costs, and 3) review existing long-term plans for library service in Orange County.

The purpose of this report is to provide an overview of current library services in Orange County and possible goals for the future of this service. The report includes

- a brief background for the Orange County Library System (OCPL) and the Chapel Hill Public Library (CHPL) with budget comparisons as attachments;
- a review of long-term service plans for both libraries, including Orange County's Library Services Task Forces of 2000, 2004, and 2007 and their recommendations, and Chapel Hill's *Library Master Plan*;
- a comparison of services over a two-year period;
- a checklist of services, based on recommended minimum state standards for public libraries;
- a list of current and easily implemented service collaborations;
- a list of long-term service options posing moderate to stronger barriers to implementation.

## GUIDING PRINCIPLES

The principles adhered to by County and Town library administrative staff to develop this report information include 1) recognition of the valuable service provided by the Chapel Hill Public Library to all citizens of Orange County, 2) interest in developing equitable and enhanced library service for all Orange County residents, and 3) accurate and comparable data collection and costs projections to guide informed discussion. Calculations included in the report are based on certified population figures found on the North Carolina Office of State Budget and Management website ([www.osbm.state.nc.us](http://www.osbm.state.nc.us)) for both the County and the Town. Calculations for full-time equivalent (FTE) employees are based on Orange County's standard 40-hour work week.

## BACKGROUND--ORANGE COUNTY PUBLIC LIBRARY

The Hyconeechee Regional Library Relationship: Orange County Public Library is a member of the 3-county regional library system of Caswell, Person and Orange Counties, called Hyconeechee Regional Library System (HRLS). HRLS was first organized under state statutes in 1948 to provide for the administration of library services within the region. Each library within the region functions as a county department in its county of location. Currently the Orange County Public Library Director serves as the Regional Library Director and reports to a nine-member advisory board.

State Aid to Public Libraries is distributed according to a formula. The formula for regional libraries includes a per capita distribution of aid based on the library's legal service area. It also allocates 50 percent of total State Aid as equal block grants to each eligible county library, plus an additional block grant to each multi-county regional library. The three counties benefit financially by virtue of their regional alliance along with shared opportunities for strategic planning and staff development. State aid funds anticipated for Orange County in the amount of \$119,997 in 2009-10 are the source of funding under which the regional office responsibilities are conducted.

OCPL Profile: The Orange County Public Library (OCPL) is comprised of a main library and three branches (Attachment 1: *Library Service Map*).

The *Main Library* in Hillsborough was established in 1910 as a single-location membership library and became part of the Hyconeechee Regional Library System in 1948. The current facility on Tryon Street is 13,700 square feet. It will be replaced by the new 23,500 square foot facility on W. Margaret Lane, anticipated to open in January 2010.

The *Carrboro McDougle Branch* opened as a joint public library – school facility in 1995. Funds were reallocated to the Carrboro McDougle branch by cutting the library bookmobile service to all of Orange County. This branch is operated with a contractual agreement between Orange County and the Carrboro – Chapel Hill School System. As part of the contractual arrangement, this co-located facility's hours do not conflict with school hours. The media center of the school is currently 7,000 square feet, housing the elementary, middle and public library collections.

The *Cedar Grove Branch* opened in April 2004 to serve the communities of Cedar Grove and northern Orange. This facility is currently located in two rooms of 1,980 square feet in the Northern Human Services Center, formerly utilized as a school.

The *Cybrary Branch* opened in August 2004 to serve the downtown community of Carrboro. The branch is a partnership with the Town of Carrboro who provide space, computers and furnishings in kind. This branch is located in the basement of the Century Center in a room of 1,060 square feet. The Cybrary is a unique branch given its focus on electronic access and services, with a small rotating popular collection.

The Orange County Library Director reports to the Assistant County Manager and works with the support organizations – the Friends of the Orange County Library and the Friends of the Carrboro Branch Library

OCPL Photos: Pictures of Orange County Public Library's main library and three branches are provided in Attachment 2 (*OCPL Facilities*).

OCPL Patron Use: In 2007-08, residents borrowed 253,484 from the libraries or 3.4 materials per capita, less than the state average of 4.62 per capita. In 2008-09, circulation increased 9.8% to 278,488 or 3.8 materials borrowed per capita.

OCPL Circulation Breakdown by Users: Breakdowns of OCPL's current users (24,834) and the number of items loaned in 2008-09 are included available in Attachment 3 (*Geographic Analysis of OCPL Patrons*) and Attachment 4 (*Circulation: 2001-2009*). Note: OCPL patron data is tracked using voting precincts in Orange County. By FY10-11, both OCPL and CHPL will use the same collection method for tracking patron location.

OCPL Budget: Anticipated 2009-10 expenditures include operating (\$1,567,542). The new library capital expenditure includes design and construction (\$6,300,754) and debt service (\$8,162,565).

- Operating budget (\$1,567,542). Due to its regional relationship with Caswell and Person counties, OCPL receives 1/3<sup>rd</sup> of the block State Aid grant from the Department of Cultural Services. Anticipated 2009-10 revenue sources include Orange County's general fund (\$1,416,402), fines and fees (\$24,550), Town Support (Carrboro: \$4,000; Hillsborough: \$5,000) and State Aid (\$117,590). Attachment 5 (*Revenue Charts*) and Attachment 6 (*OCPL Operating Budget: 1993-2010*) provide a breakdown of revenues and expenditures for the past 18 years.
- Capital budget (\$8,162,565). OCPL is currently building its first library in the County Campus project. The estimated cost of this project totals \$8,162,565, including \$6,303,754 in principal and \$1,862,570 in interest (Attachment 7: *OCPL New Main Library Debt Service*). All debt service for the new main library is budgeted as a county expense. No municipal support is anticipated for this library project

## **BACKGROUND--CHAPEL HILL PUBLIC LIBRARY**

CHPL Profile: The Chapel Hill Public Library (CHPL) was established as a single-location municipal library in 1958 and became a department of the Town of Chapel Hill in 1976. Its 9-member advisory Library Board includes one Orange County appointee and eight Town Council appointees and reports to the Town Council. The director reports to the Town Manager and works with two support organizations--the Friends of the Chapel Hill Public Library, established in 1958, and the Chapel Hill Public Library Foundation, established in 1997. The Friends mainly augment annual operations expenses (ex: supplements toward the annual materials budget). The Foundation mainly provides support toward longer-term capital expenses (ex: large donations toward a one-time collection development project). The current facility is 27,300 square feet. An expansion of the facility to 68,000 square feet is scheduled to begin next year, funded with \$16.23 million in bond funds approved by voters in 2003.

CHPL Photos: Pictures of the Chapel Hill Public Library are provided in Attachment 8 (*CHPL Facilities*).

CHPL Patron Use: CHPL continues to report the highest annual per capita circulation in the state. In 2007-08, residents borrowed 911,083 materials or 16.6 materials per capita, significantly higher than the state average of 4.62 per capita. In 2008-09, circulation increased 7% to 976,870 or 17.8 materials borrowed per capita.

CHPL has been rated number one in the state by the Hennon's American Public Library Rating (HAPLR) Index since 1997. HAPLR Index comparisons are based on public library statistics collected nationwide and disseminated annually through the Federal-State Cooperative System (FSCS) for public library data.

All Orange County residents are eligible to receive a free CHPL library card because Orange County provides annual library support to the Town. A main reason for CHPL's high circulation is that, in addition to its legal service population, it also serves a significant number of southern Orange County residents living outside Chapel Hill town limits.

CHPL Circulation Breakdown by Users: Breakdowns of CHPL's current users (29,436) and the number of items loaned in 2008-09 are included available in Attachment 9 (*Geographic Analysis of CHPL Patrons*) and Attachment 4 (*Circulation: 2001-2009*). *Note: CHPL patron data is tracked using census zones in Orange County. By FY10-11, both OCPL and CHPL will use the same collection method for tracking patron location.*

Approximately 40% percent of CHPL's card-carrying patrons are Orange County residents who do not pay Chapel Hill taxes. Based on periodic library automation system surveys over 14 years, approximately 40% of CHPL's circulation is also by Orange County residents living outside Chapel Hill. These percentages have remained consistent over the years, varying no more than 1-2 percent in any given year.

Based on these statistics, Orange County residents living outside Chapel Hill in 2008-09 borrowed 390,748 materials from CHPL. Over the same period, OCPL's total annual circulation was 278,488.

**CHPL Budget:** Anticipated 2009-10 operating expenditures total \$2,373,932. Multi-year capital project budgets include collection development (\$305,000), and library expansion debt service (\$26,806,693).

- **Operating budget (\$2,373,932).** The majority of CHPL's operating revenue is provided by the Town of Chapel Hill. Anticipated 2009-10 revenue sources include Chapel Hill's General Fund (\$1,899,891), Orange County library support (\$249,333), fines and fees (\$113,000), library gift funds (\$75,000) and state aid (\$36,708).

CHPL receives state aid that includes a per capita distribution for its legal service population (54,904). However, because it is a municipal library, it does not qualify for the additional block grants that county and regional libraries receive. As a result, state aid is not a significant revenue for Chapel Hill.

Orange County's library support to Chapel Hill has remained **level** since 1994. Chapel Hill continues to make regular annual requests for increased operating support from Orange County to offset costs associated with heavy library use by non-Chapel Hill residents. Attachment 5 (*Revenue Charts*) and Attachment 10 (*CHPL Operating Budget 1993-2010*) provide a breakdown of revenues and expenditures for the past 18 years.

- **Capital budget (\$27.11million).** CHPL is currently engaged in two multi-year capital projects, both of which are directed toward meeting goals identified in CHPL's *Library Master Plan*.

The \$305,000 Collection Development Project is funded primarily from Library Foundation donations. The Library Expansion Project is being funded from bonds approved by the Chapel Hill citizens in 2003. The cost of the expansion project totals \$26,806,693, including \$16.23 million in principal and \$10,291,319 in interest (Attachment 11: *CHPL Expansion Project Debt Service*).

All debt service for the expansion project is budgeted as a Chapel Hill expense. No county or other municipal support is anticipated for this project.

## **LONG-TERM LIBRARY SERVICES PLAN—ORANGE COUNTY**

Orange County Public Library participated in three Library Service Task Forces in 2000, 2004 & 2007. These Task Force Reports were presented to and accepted by the Board of County Commissioners. The recommendations from these reports have been reviewed and utilized by the BOCC and County Management to guide the process of reaching the goal of providing equitable library services for Orange County residents.

The Library Services Task Force Reports are:

Dec 3, 2001	<u><a href="http://www.co.orange.nc.us/OCCLERKS/0112039a.pdf">Library Services Task Force Report 2001</a></u>  <u><a href="http://www.co.orange.nc.us/OCCLERKS/0112039a.pdf">http://www.co.orange.nc.us/OCCLERKS/0112039a.pdf</a></u>
October 19, 2004	<u><a href="http://www.co.orange.nc.us/OCCLERKS/0410197c.pdf">Library Services Task Force Report 2004</a></u>  <u><a href="http://www.co.orange.nc.us/OCCLERKS/0410197c.pdf">http://www.co.orange.nc.us/OCCLERKS/0410197c.pdf</a></u>

Two Reports from the 2007 Task Force:

December 3, 2007	<u><a href="http://www.co.orange.nc.us/OCCLERKS/0712033b.pdf">Library Services Task Force Update</a></u>  <u><a href="http://www.co.orange.nc.us/OCCLERKS/0712033b.pdf">http://www.co.orange.nc.us/OCCLERKS/0712033b.pdf</a></u>
May 20, 2008	<u><a href="http://www.co.orange.nc.us/OCCLERKS/0805203e.pdf">Library Services Task Force Report 2008</a></u>  <u><a href="http://www.co.orange.nc.us/OCCLERKS/0805203e.pdf">http://www.co.orange.nc.us/OCCLERKS/0805203e.pdf</a></u>

Please see the matrix attached for more detail on the recommendations of each report and outcomes or updates (Attachment 12: *OCPL Task Force Report and Updates*).

## **LONG-TERM LIBRARY SERVICES PLAN—CHAPEL HILL**

The Town Council adopted CHPL's *Library Master Plan* in 2003. The Plan is the result of a six-year process (1997-2003), similar to Orange County's Library Task Force reports. The plan recommends service levels for the collection, programming, facilities, technology and staffing for Chapel Hill through 2025. CHPL's *Library Master Plan* is comprised of three reports:

- [The Five Year Service Plan: 2001-2006 and Long Term Facilities Needs Through 2020.](#)
- [The Chapel Hill Public Library Information Technology Plan: 2003-2007.](#)
- [The Chapel Hill Public Library Building Program: 2003-2025.](#)

Calculations for services and facilities were based on national and state library standards and on Chapel Hill's history of heavy library use by its citizens. The Plan's 2025 projected design

population of 93,103 is based on local and regional planning data, population trends of the Town of Chapel Hill and southern Orange County and projections that reflected both present library use and estimated population growth. A service area map for this design population is provided in Attachment 1 (*Library Service Map*).

Town of Chapel Hill population projected to year 2025	73,355
Projected Bingham Township and Chapel Hill Township, excluding the Town of Chapel Hill, = 61,715.	
Current use of the library by this area is 32%; using 32% of 61,715 yields a service population of	<u>19,748</u>
Recommended “design population” for expansion program:	<b>93,103</b>

### LIBRARY SERVICE COMPARISONS

SERVICES	OCPL Actual 07-08	CHPL Actual 07-08	OCPL Actual 08-09	CHPL Actual 08-09
Adult Circulation	141,899	451,880	150,065	446,325
Children's and Youth Circulation	111,505	456,645	128,423	530,545
Downloadable Materials	N/A	2,559	N/A	4,383
<b>TOTAL CIRCULATION</b>	253,404	911,084	278,488	976,870
Circulation per hour with all location hours included	29	258	32	291
Interlibrary loan requests	1,165	792	1,285	790
Loans to other Hyconeechee and Orange County Libraries	3,362	NA	5,582	NA
Reserves of Materials	5,964	12,725	8,057	28,855
Active patrons as of July 1, 2009	24,836	29,566	24,834	29,436
Reference activity	26,630	102,540	25,570	95,098
Public Internet Sessions	45,885	74,470	52,875	60,876
Children's computer sessions	N/A	7,510	N/A	7,302
Volunteer hours	N/A	3,320	N/A	3,739
<b>PROGRAMS</b>				
Meeting Room Attendance	5,322	13,014	18,743	11,003
Children's Program Attendance	10,306	17,007	12,133	16,917
Collection Size	121,060	178,687	115,613	178,568

## CHECKLIST OF SERVICES

The following chart 1) identifies recommendations for minimum standards included in *Guidelines for North Carolina Public Libraries, 1998* and 2) compares the level of service offered by the Orange County Public Library and the Chapel Hill Public Library. Calculations below are based on certified population figures found on the North Carolina Office of State Budget and Management website ([www.osbm.state.nc.us](http://www.osbm.state.nc.us)) for both the County and the Town. Calculations for full-time equivalent (FTE) employees are based on a 40-hour workweek.

*(\*During the 2009-10 Budget work session and adoption of the Orange County budget, OCPL achieved major strides in funding and staffing toward its goal of meeting minimum library standards for North Carolina in the future. \* Since 2003, CHPL has worked toward meeting service goals identified in its Library Master Plan. These goals are based on a combination of minimum standards, population trends for CHPL's design population and current and projected use).*

MINIMUM STANDARDS	OCPL	CHPL
<p><u>Access to Library Services</u></p> <ul style="list-style-type: none"> <li>A full service library is open a minimum of 60 hrs/week, all library services are available whenever the library is open.</li> </ul>	<p>Main - 54 hrs per wk* (beginning 1/10)</p> <p>Cedar Grove – 44 hrs per wk</p> <p>Carrboro – 26 hrs per wk</p> <p>Cybrary – 40 hrs per wk</p>	<p>68 hours per week</p>
<p><u>Collection Management</u></p> <ul style="list-style-type: none"> <li>The library owns a minimum of 2 books per capita, plus other materials. The library spends at least 20% of its annual budget for print materials, a/v materials &amp; electronic databases.</li> </ul>	<p>1.6 materials per capita (116,075 / 72,440 = 1.6)</p> <p>14% is spent on materials</p>	<p>3.3 materials per capita (178,568 / 54,904= 3.3)</p> <p>11% is spent on materials</p>
<p><u>Access to Public Computers</u></p> <ul style="list-style-type: none"> <li>Each library facility has at least 1 computer work station for every 2,500 people in its designated service area.</li> </ul>	<p>Recommended 29</p> <p>Actual: 28 public computers system-wide (Main + 3 branches)</p>	<p>Recommended: 22</p> <p>Actual: 27 public computers, including children's stations</p>

MINIMUM STANDARDS	OCPL	CHPL
<p><u>Staffing</u></p> <ul style="list-style-type: none"> <li>At least 2% of the personnel budget is allocated to in-service training and continued education.</li> </ul>	<p>Recommended: \$28,639</p> <p>Actual: \$3900</p>	<p>Recommended: \$35,630</p> <p>Actual: \$5,000</p>
<ul style="list-style-type: none"> <li>1 FTE staff person is provided for every 2,000 people in the service population; at least 1/3 are of FTE staff are librarians with MLS degrees.</li> </ul>	<p>Legal service population: 72,440</p> <p>Recommended FTEs: 36.22</p> <p>09-10 Actual FTEs: 24.8 (21 + 3.8 temp = 24.8)</p> <p>Recommended MLSs: 11.9</p> <p>Actual FTEs with MLS: 11</p>	<p>Legal service population: 54,904</p> <p>Recommended FTEs: 27.5</p> <p>09-10 Actual FTEs: 36.4 (31.5+4.9 temp = 36.4)</p> <p>Recommended MLSs: 10.5</p> <p>Actual FTE with MLS: 8.1</p>
<ul style="list-style-type: none"> <li>A full service library has a state certified Public Library Manager (Branch Manager), a children's librarian &amp; Reference Librarian.</li> </ul>	<p>OCPL does not meet this standard at all locations, but hopes to do so in the next budget cycle of 10-11.</p>	<p>Public Library Manager: Y</p> <p>Children's Librarian: Y</p> <p>Reference Librarian: Y</p>
<ul style="list-style-type: none"> <li>In addition to staff for children's, reference and circulation activities, staff is also provided for administrative, technical &amp; support services.</li> </ul>	<p>Administration: 2.5 FTEs</p> <p>Children's: 3.5 FTEs</p> <p>Reference: 4.65 FTEs</p> <p>Technical Services: 2.0 FTEs</p> <p>IT: 1.0 FTEs</p> <p>Branches:</p> <p>Branch Staff: 2.2 FTEs</p>	<p>Administration: 2.9 FTEs</p> <p>Children's: 4.9 FTEs</p> <p>Reference: 5.5 FTEs</p> <p>Technical Services: 4.5</p> <p>IT: .3 FTE temp</p>
<ul style="list-style-type: none"> <li>Regardless of size, all libraries have at least 2 persons per station on duty at all times the library is open.</li> </ul>	<p>Standard varies per branch/hour open. Use of temp staff to remain @ 2 people. The Cybrary has only 1 staff member on duty during hours open, except for a brief 15-30 minute overlap.</p>	<p>Varies per hour open.</p>

## EXISTING OR EASILY IMPLEMENTED COLLABORATIONS

1. Collaborations existing between the two libraries already.
  - 1.1 Web page links. OCPL and CHPL currently provide supporting information for neighboring libraries on their web pages as an easy cost-effective way to assist citizens.
  - 1.2 Joint efforts between the two Friends of the Library groups. Friends officers provide support in financial reporting, book sale procedures and opportunities for pre-sale purchases at book sales. Friends also assist by publicizing one another's programs.
  - 1.3 Purchasing books and materials from vendors jointly to reduce costs. OCPL and CHPL belong to a regional consortium of libraries that reduces costs of library collection items by increasing its volume of purchases.
  
2. Collaborations that could be implemented at little cost.
  - 2.1 Partnering on summer reading program themes, marketing, performers, etc. Pooling resources for bulk purchases, marketing and booking of performers could potentially reduce fees for both library systems.
  - 2.2 Partnering on adult programming efforts. CHPL and OCPL are currently collaborating with the Orange County Partnership to end Homelessness on a one-book-one community program featuring "The Soloist," by Steve Lopez.
  - 2.3 Sponsoring or conducting joint staff development and training. Both libraries could identify and post opportunities for shared training programs on reference, customer service, etc.
  - 2.4 Partnering in library promotions and celebrations. National Library Week and Banned Books Week are two examples of annual library celebrations that could be jointly advertised, utilizing similar marketing styles, themes, etc.

## LONG-TERM SERVICE OPTIONS

1. Options representing moderate barriers to implementation.
  - 1.1 Institute a county-wide card system to access both OCPL and CHPL collections. A county-wide card system would permit all patrons within Orange County to make use of any of the libraries in Orange County using a single library card. Although these patrons already have free access to all libraries in the county, the libraries' automation systems are not compatible and patrons must carry three library cards to gain access to the various locations (OCPL; McDougle Branch; CHPL).

*(The State Library is currently working toward the model of a state-wide card system for all North Carolina Public Libraries, scheduled to begin in 2012. OCPL has indicated*

*interest in participating in the system. CHPL has not yet indicated whether it will participate.)*

**Benefits:** A county-wide card system would provide a) patron access to a larger collection base, including Hyconeechee branch collections in Caswell and Person counties, b) potential increased patronage of libraries, and c) eliminate the need for patrons to carry multiple library cards.

**Barriers:** Barriers would include a) the capital cost to purchase and update necessary hardware and software to link all the library automation systems, which might be offset by possible BOCC funding of \$10,000 currently set aside for interoperability, b) increased operational cost to provide courier service between all libraries, c) the cost of administrative oversight, d) development of mutual policies and processes such as borrowing status and eligibility, e) issues of patron privacy associated with exchange of user data, f) increased patron use which accelerates wear on collection items, and g) increased cost to replace collection items.

**1.2 CHPL continues services to all Orange County residents at the same level of Orange County funding.** This option would maintain the current arrangement of funding between the County and Chapel Hill.

**Benefits:** Continuing the current arrangement would: a) provide the same library service at the existing level for all CHPL users with no interruption of service.

**Barriers:** Barriers include a) increased CHPL operating costs without increased County funding requires increasing Chapel Hill's General Fund contribution to maintain existing services (Attachment 10: *CHPL Funding Sources*), and b) CHPL's ability to maintain existing service at the current level for all patrons without additional funding.

**1.3 Orange County phases in additional funding for CHPL services.** This option would require the County and Town to develop a plan and a time frame for reaching an equitable level of library support for CHPL. Attachment 13 (*Funding Formula*) provides an example of a possible funding formula to achieve additional funding.

**Benefits:** Phased-in additional funding would: a) acknowledge the valuable service provided by CHPL to all citizens of Orange County, b) demonstrate the County's commitment toward equitable funding for CHPL, c) provide adequate time to develop and implement a budgeting strategy, and d) minimize the impact of achieving equitable funding by gradually implementing annual increases.

**Barriers:** Barriers include available funds, due to the current economic climate affecting all local governments.

**1.4 Orange County phases in additional funding for OCPL and CHPL to meet minimum standards and long-range goals.** With this option, the County would develop and implement a long-term strategic plan to achieve levels of service for collection,

staffing and facilities identified in *Guidelines for North Carolina Public Libraries*, the Orange County Library Task Force reports and Chapel Hill's *Library Master Plan*. Costs associated with this option would require further investigation.

*(\* OCPL intends to begin working on a collection development goal in accordance with minimum service standards identified in Guidelines for North Carolina Public Libraries, 1998. The plan will also address the limited space in current OCPL libraries for collection development. \* CHPL is in the third of a four-year collection development project to achieve goals set out in its Library Master Plan.)*

**Benefits:** Phased-in additional funding would: a) initiate funding to meet service goals adopted over the past 10 years, b) formalize a process to raise existing levels of library service to meet minimum recommended standards, c) demonstrate the County's commitment to equitable library service for all county residents, d) provide adequate time to develop and implement a budgeting strategy, and e) reduce the impact of increased cost by gradually implementing annual increases over several years.

**Barriers:** Barriers include current lack of available funds to expand services, due to the current economic climate affecting all local governments.

2. Options that represent stronger barriers to implementation and that could be effected independently by Chapel Hill.

*(North Carolina's GS 153A-264 states that "if a county or city...operates or makes contributions to the support of a library, any resident of the county or city, as the case may be, is entitled to the free use of the library." Implementation of either of the two options below would require Chapel Hill to forego any Orange County library support. Chapel Hill residents would retain free access to OCPL services. Orange County residents living outside Chapel Hill's corporate limits could be charged for library service.)*

#### 2.1 CHPL eliminates services to non-residents of Chapel Hill.

**Benefits:** Eliminating service would: a) reduce Chapel Hill's ongoing operating costs commensurate with a 40% reduction in use, b) provide Town residents with greater access to materials, c) reduce patrons' wait time for popular materials on reserve, d) reduce the amount of temporary space needed for the library to operate during the 2-year transition service period during expansion construction and e) reduce the amount of permanent square footage needed to provide for library space in the future.

**Barriers:** Barriers include a) loss of County revenue, b) increased staff time to initiate a new patron card system for Orange County residents willing to pay to continue access, and c) anticipated long-term negative public reaction to CHPL service.

2.2 CHPL phases out service to non-residents of Chapel Hill.

*Benefits:* Phasing out service would: a) permit OCPL to seek additional funds over time to replace services previously provided by CHPL, b) Chapel Hill residents would phase in greater access to CHPL services, and c) begin to provide Town residents with more materials to borrow.

*Barriers:* Barriers include a) reduced services due to loss of County revenue, and b) increased cost to Chapel Hill residents to subsidize Orange County use.

3. Options that represent stronger barriers to implement and that would require action at the state level as well as the local level.

*If there is interest in pursuing the following options, we recommend that staff work with state officials to identify the feasibility, benefits and boundaries associated with each.*

3.1 Pursue Chapel Hill / Carrboro municipal library system.

3.2 Pursue a library system between OCPL and CHPL.

3.3 Pursue a regional library system between CHPL and Hyconeechee Library System.

3.4 Identify additional funding through taxes for both CHPL and OCPL.

4. The following alternatives include possible collaboration with the University of North Carolina.

*If there is interest in pursuing the following options, we recommend that staff work with UNC officials to identify the feasibility, benefits and boundaries associated with each.*

4.1 Establish a UNC/Carrboro/Chapel Hill "Lab-rary" for shared operational / personnel support from the UNC –School of Information and Library Science students.

4.2 Increase partnering on outreach programs that include all Orange County residents.

### NEXT STEPS

Optional next steps to be considered at tonight's meeting include, but are not limited to, the following:

1. Take no further action.
2. Consider collaborations that could be implemented easily.
3. Consider one or more long-term service options.
4. Other.

### ATTACHMENTS

1. [Library Service Map](#) (p. 16).
2. [OCPL Facilities](#) (p. 17).
3. [Geographic Analysis of OCPL Patrons](#) (p. 27).
4. [Circulation: 2001-2009](#) (p. 30).
5. [Revenue Charts](#) (P. 31).
6. [OCPL Operating Budget: 1993-2010](#) (p. 32).
7. [OCPL New Main Library Debt Service](#) (p. 33).
8. [CHPL Facilities](#) (p. 34).
9. [Geographic Analysis of CHPL Patrons](#) (p. 41).
10. [CHPL Operating Budget: 1993-2010](#) (p. 42).
11. [CHPL Expansion Project Debt Service](#) (p. 43).
12. [OCPL Task Force Report and Updates](#) (p. 44).
13. [Funding Formula](#) (p. 49).