

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) 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 1/3rd 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>Library Services Task Force Report 2001</u> <u>http://www.co.orange.nc.us/OCCLERKS/0112039a.pdf</u>
October 19, 2004	<u>Library Services Task Force Report 2004</u> <u>http://www.co.orange.nc.us/OCCLERKS/0410197c.pdf</u>

Two Reports from the 2007 Task Force:

December 3, 2007	<u>Library Services Task Force Update</u> <u>http://www.co.orange.nc.us/OCCLERKS/0712033b.pdf</u>
May 20, 2008	<u>Library Services Task Force Report 2008</u> <u>http://www.co.orange.nc.us/OCCLERKS/0805203e.pdf</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:	93,103

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

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

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

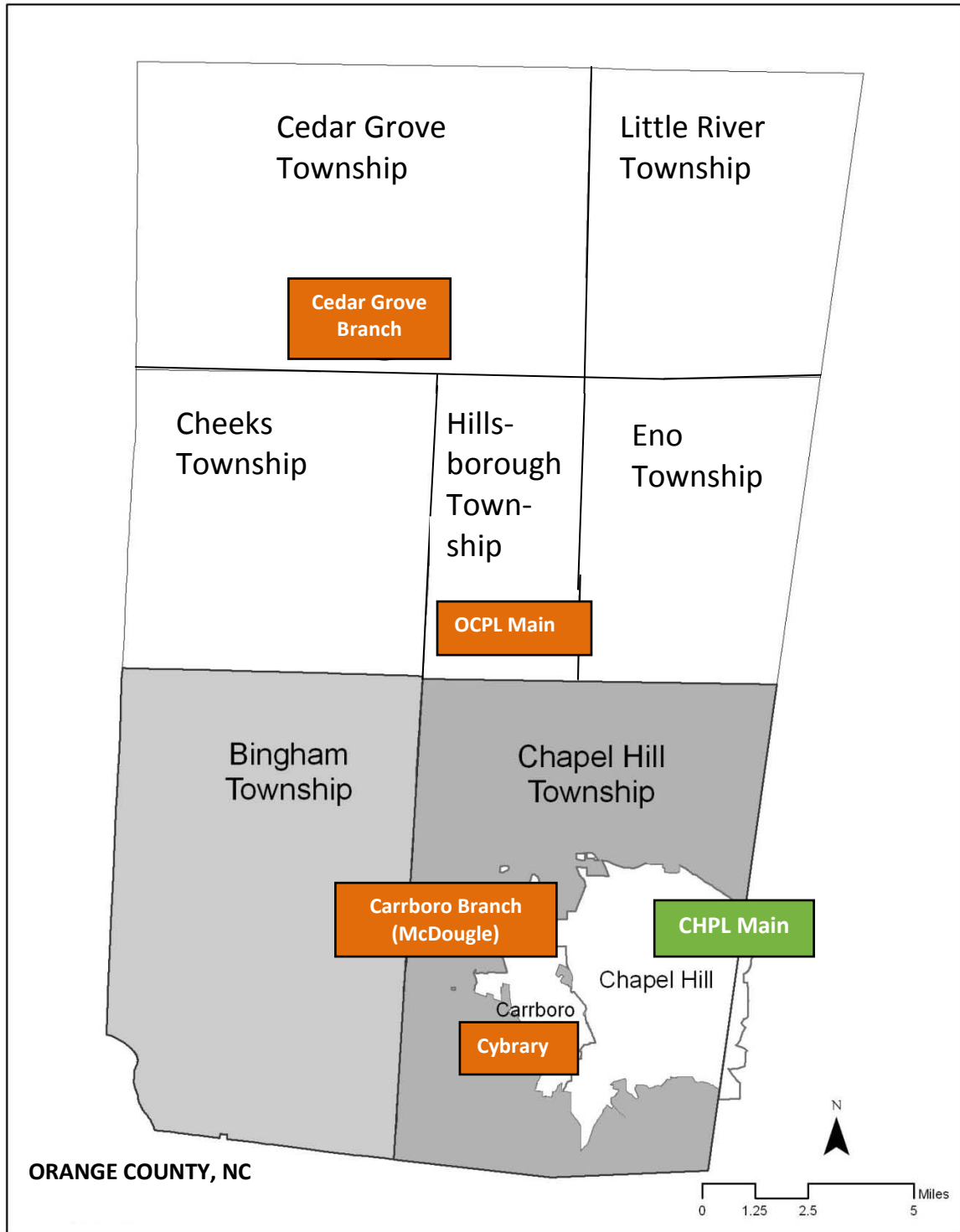
Optional next steps to be considered at tonight's meeting include, but are not limited to, the following:

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).

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ATTACHMENT 1: LIBRARY SERVICE MAP



ATTACHMENT 2: OCPL FACILITIES



Main Library Facility to open Winter 2009



Current Main Library Facility 1980 - 2009

ATTACHMENT 2: OCPL FACILITIES

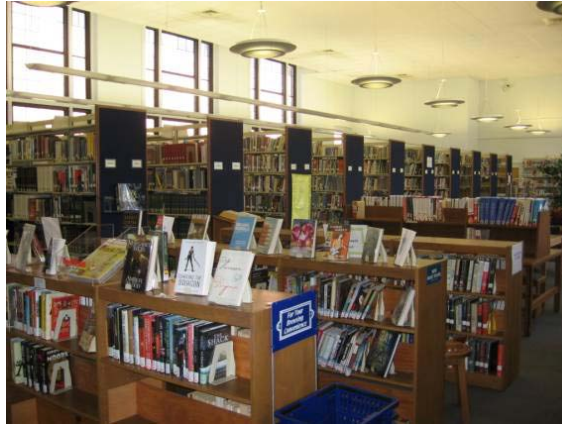


Main Library – Service Desk



Main Library –
Children's Areas





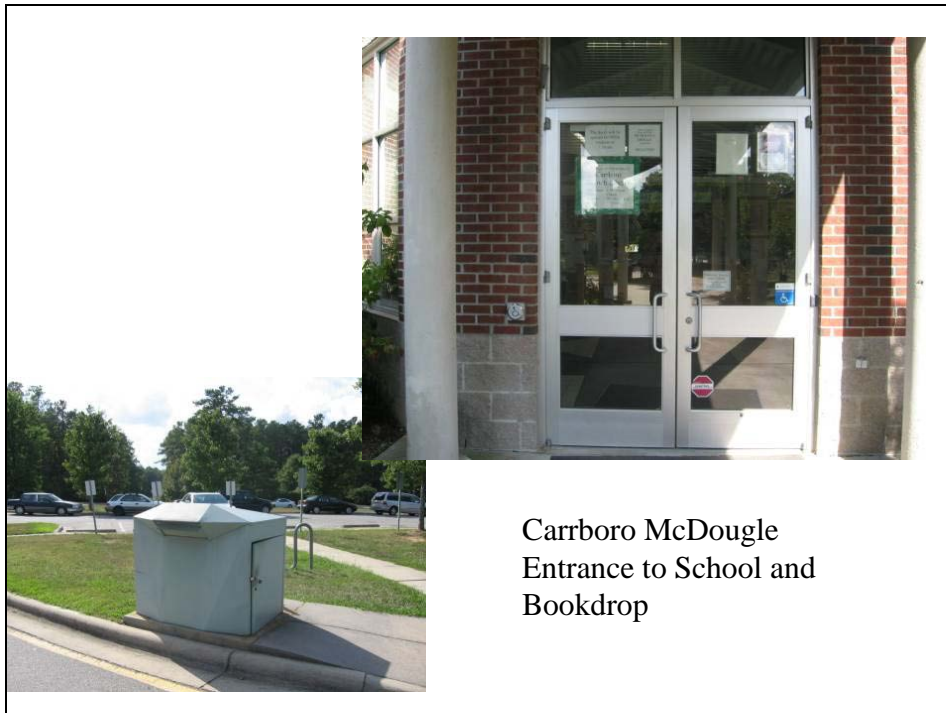
Main Library – Adult Reading Room



Main Library – NC History Collection



Carrboro McDougale Branch



Carrboro McDougale
Entrance to School and
Bookdrop

ATTACHMENT 2: OCPL FACILITIES

Carrboro
McDougle media
center and public
library



Carrboro McDougle public computer
area (Main provides 4)



Carrboro McDougale public
library staff area



Carrboro McDougale Friends workroom

Cedar Grove Branch Library



Cedar Grove
Interior entrance
hallway

ATTACHMENT 2: OCPL FACILITIES



Cedar Grove Seating area and
service desk



Cedar Grove staff room and public
reading area





Cybrary Branch Library – located in basement

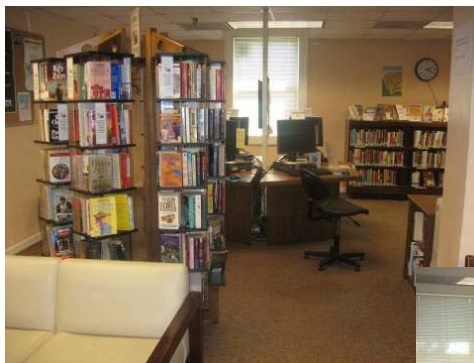


Cybrary reading collection and public computer area

ATTACHMENT 2: OCPL FACILITIES



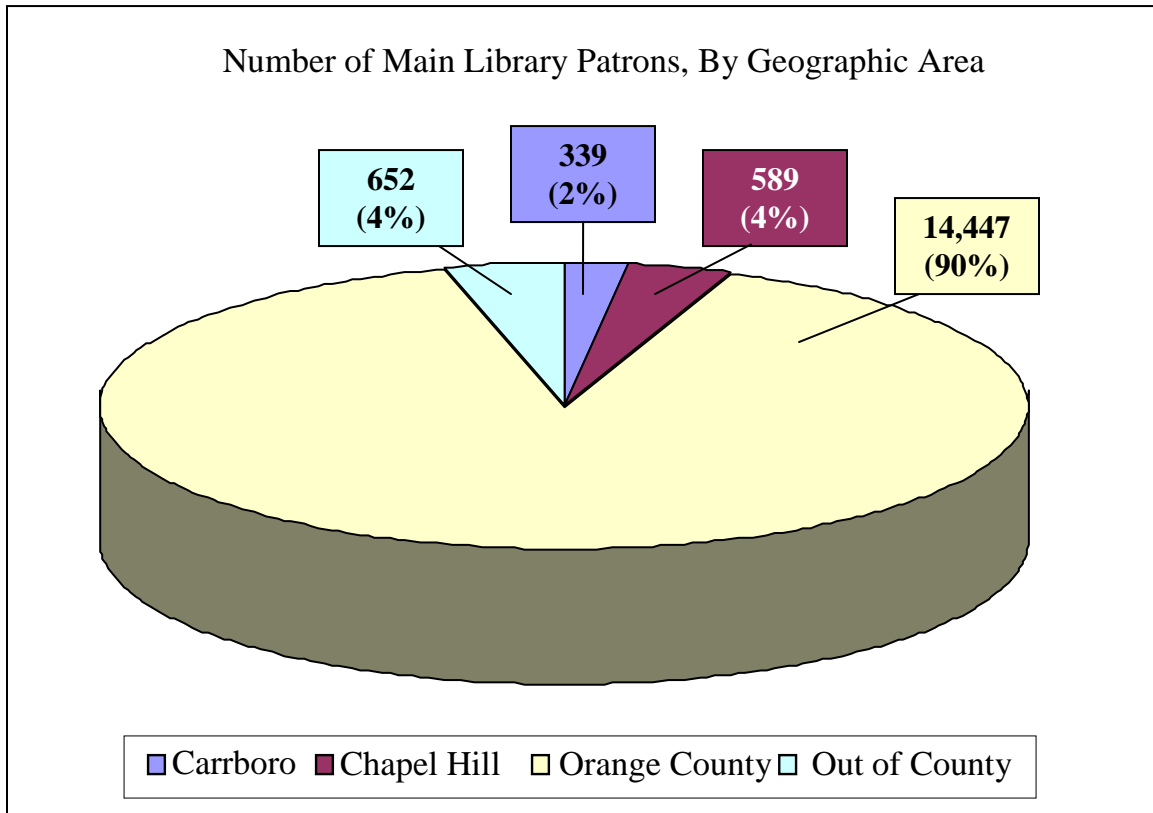
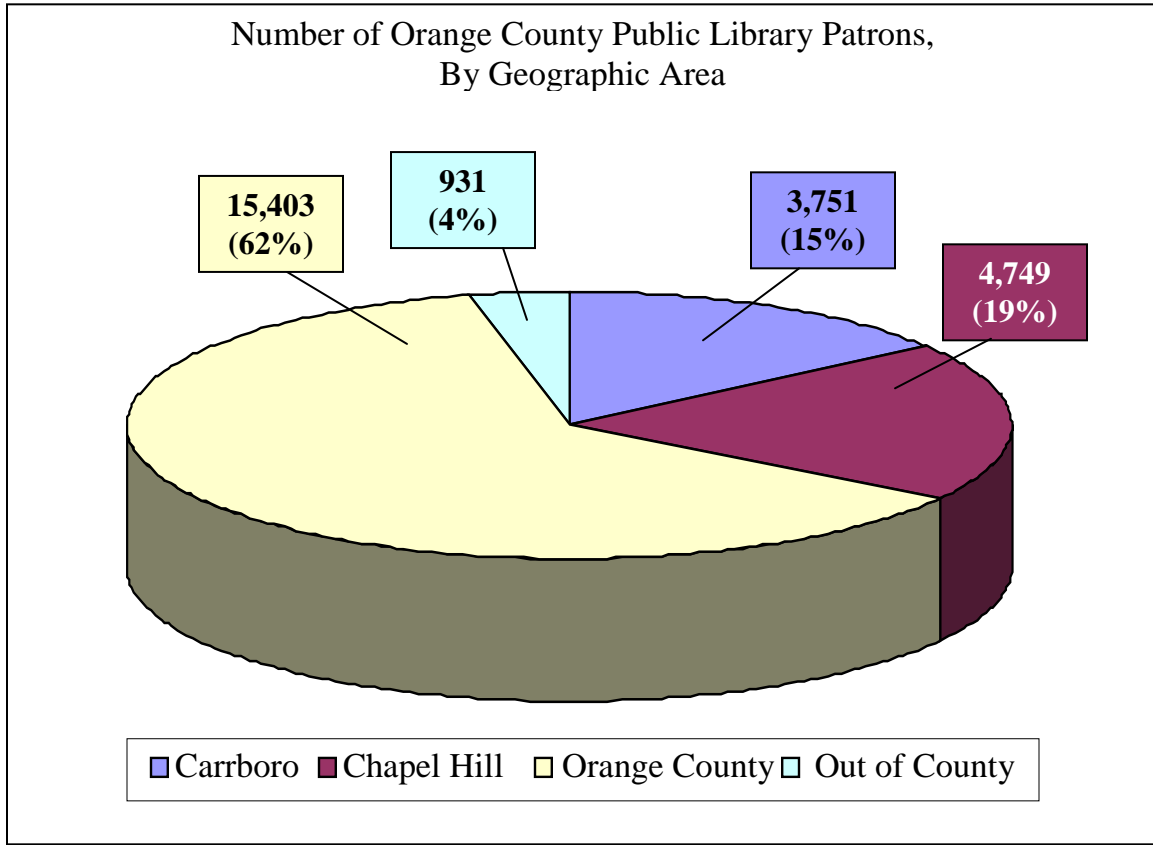
Cybrary collection and
newspaper and magazine
area



Cybrary reading area and
staff area

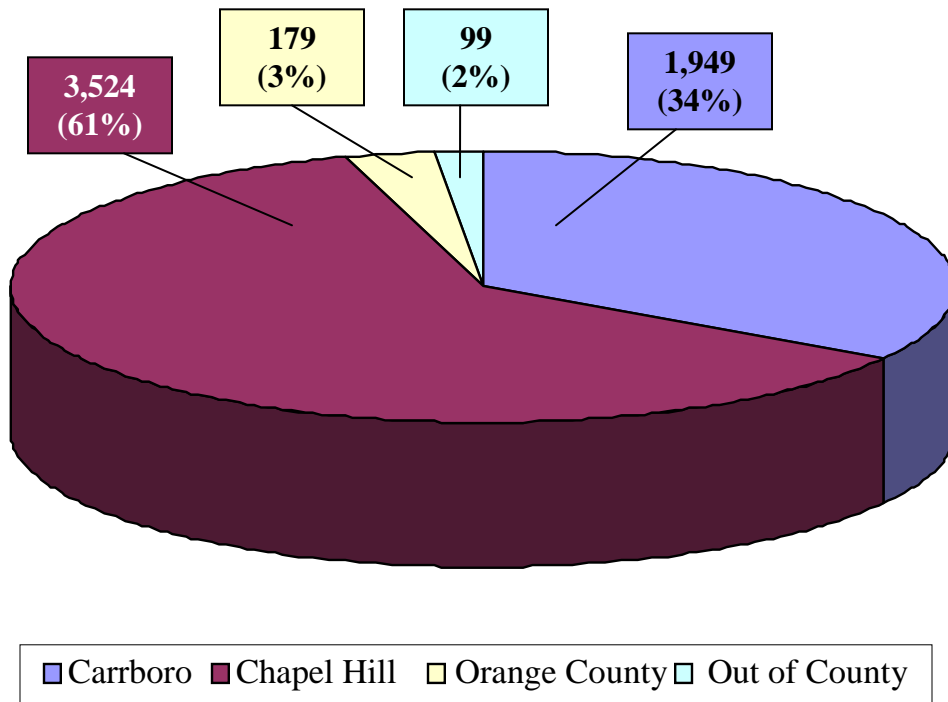


ATTACHMENT 3: GEOGRAPHIC ANALYSIS OF OCPL PATRONS

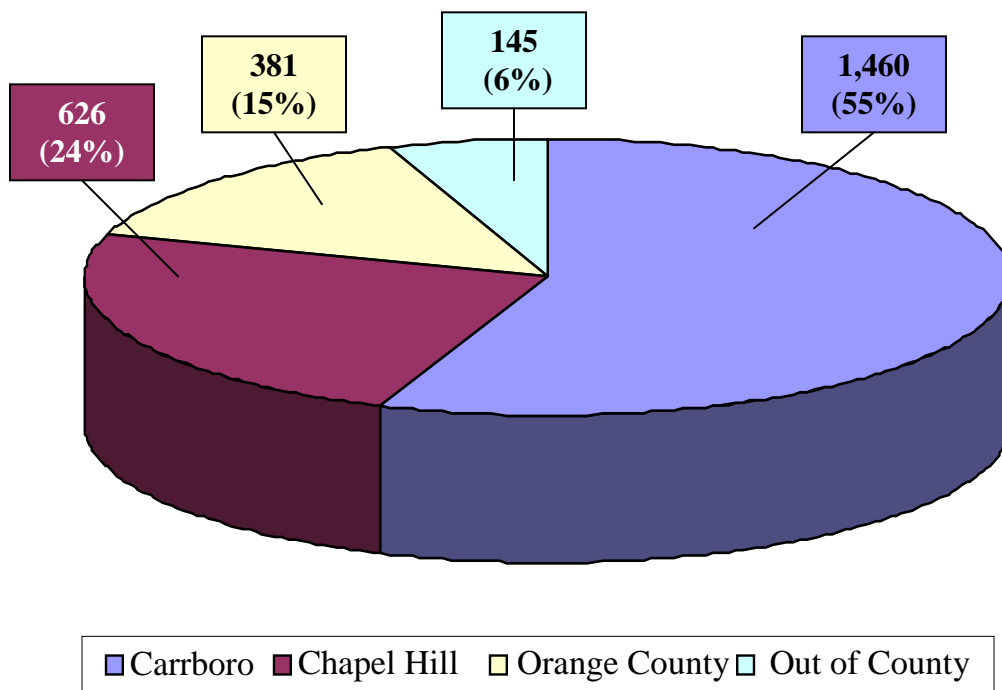


ATTACHMENT 3: GEOGRAPHIC ANALYSIS OF OCPL PATRONS

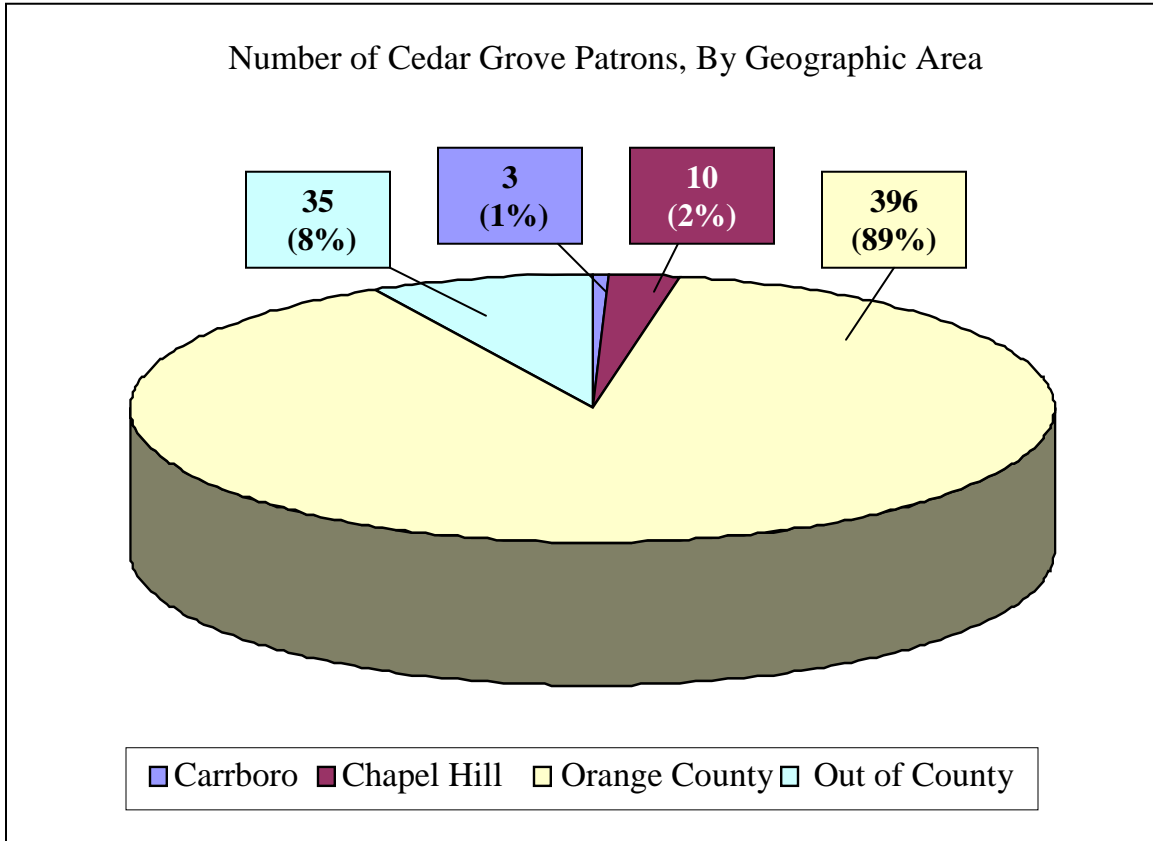
Number of Carrboro Branch Patrons, By Geographic Area



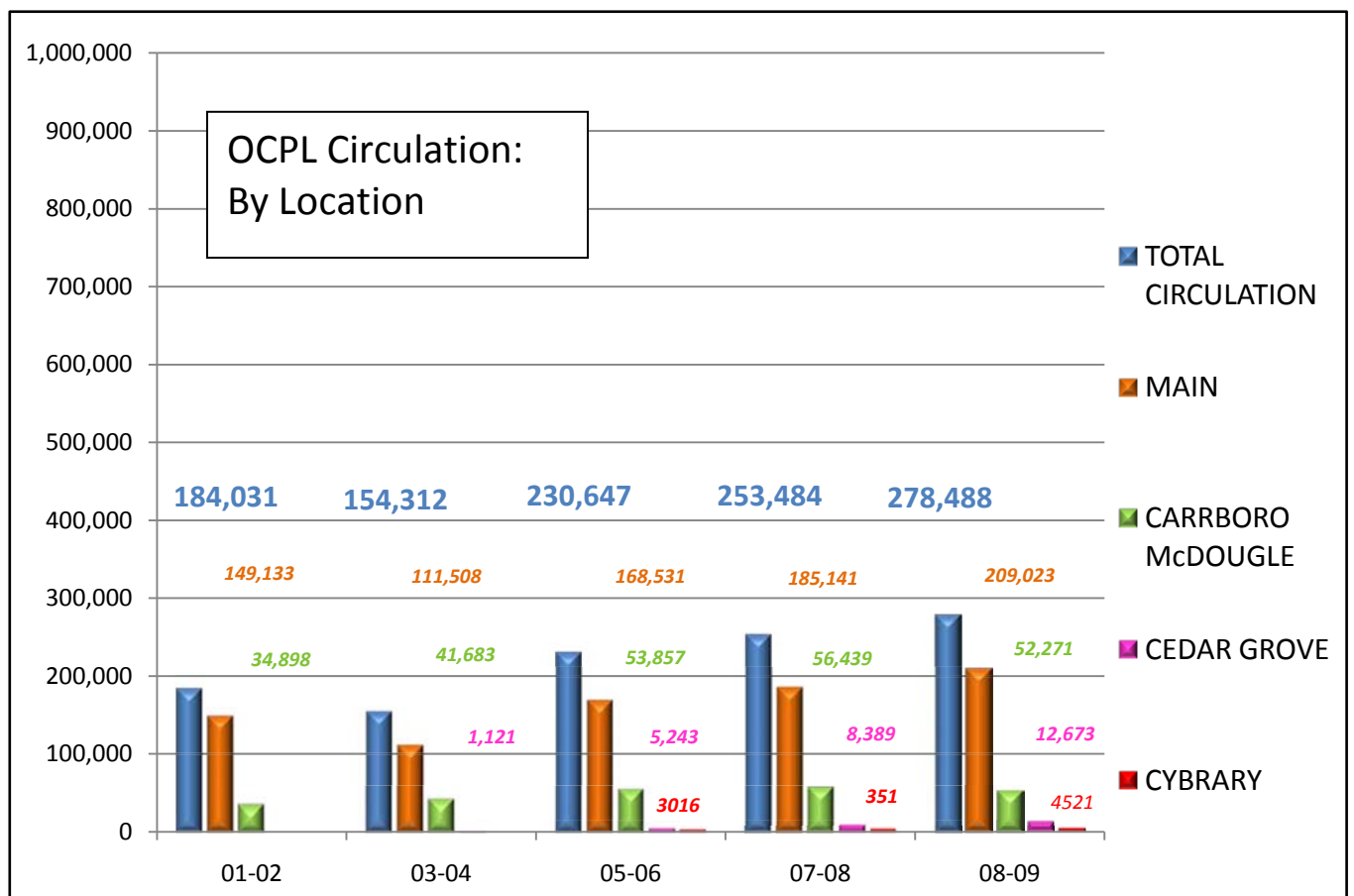
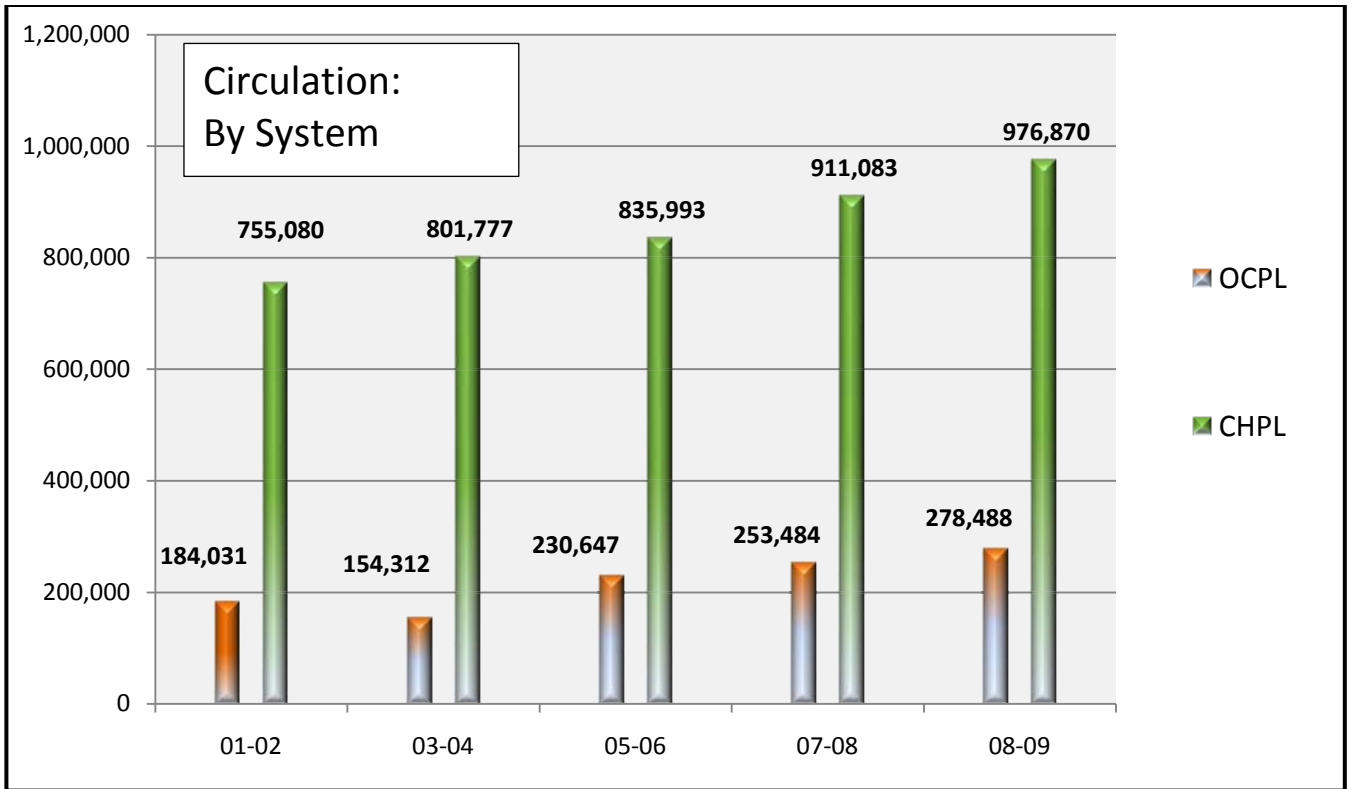
Number of Carrboro Cybrary Patrons, By Geographic Area



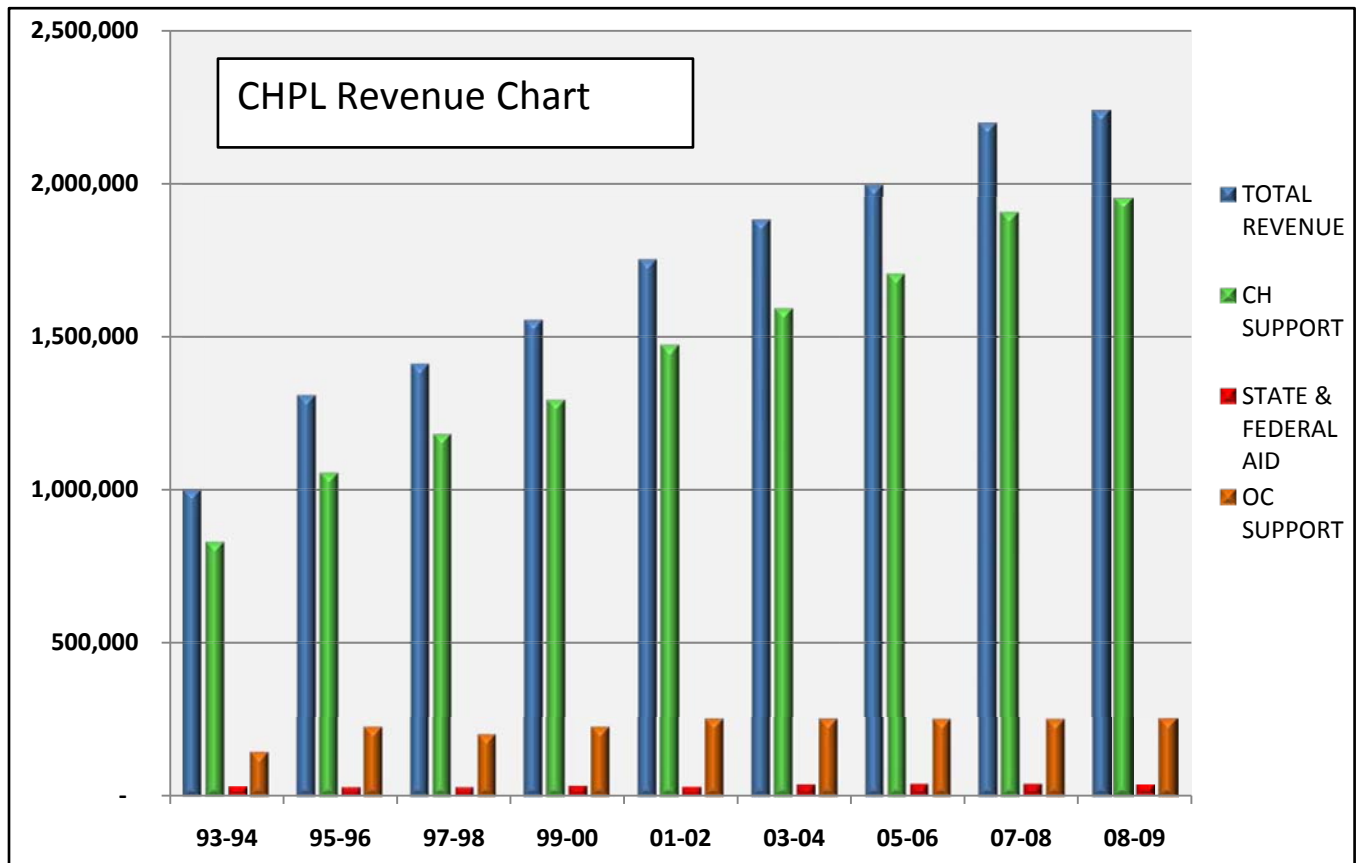
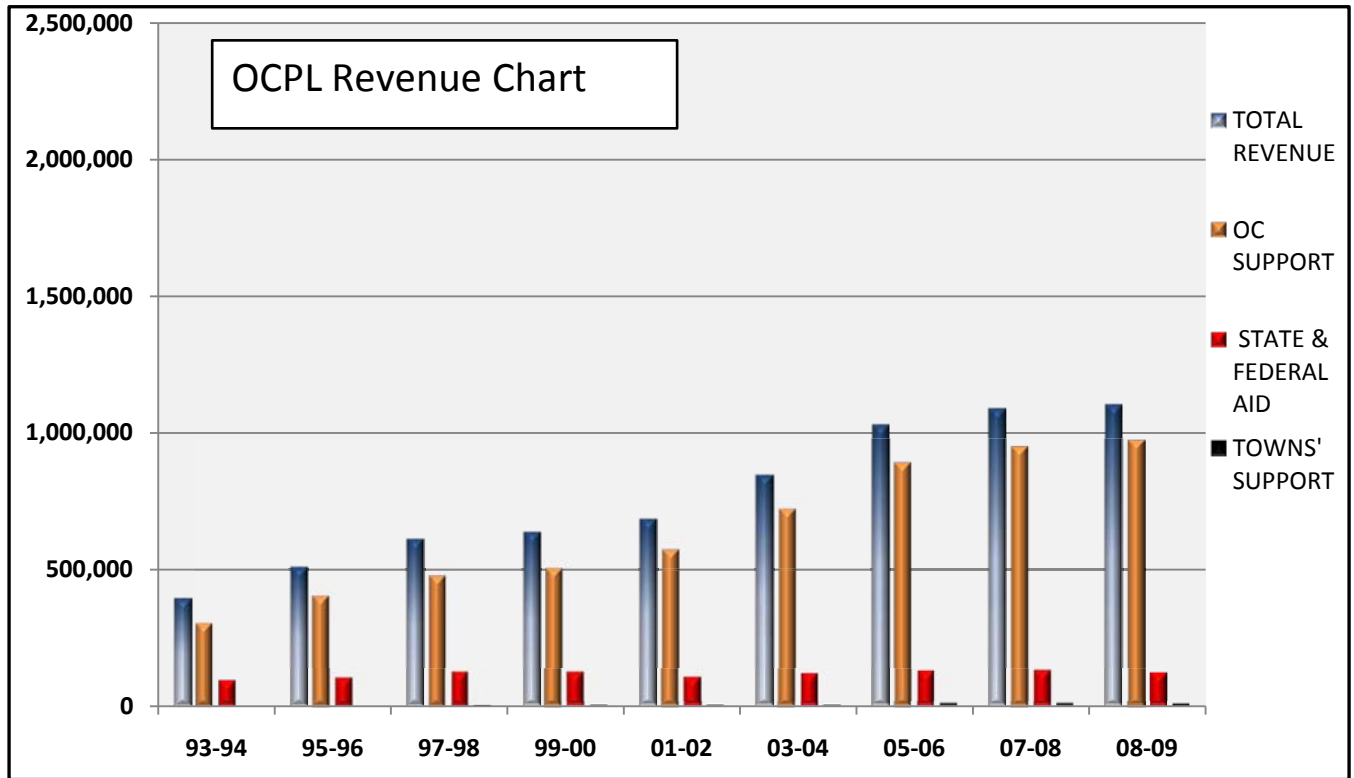
ATTACHMENT 3: GEOGRAPHIC ANALYSIS OF OCPL PATRONS



ATTACHMENT 4: CIRCULATION: 2001-2009



ATTACHMENT 5: REVENUE CHARTS



ATTACHMENT 6: OCPL OPERATING BUDGET, 1993-2010

Year	OCPL Actual Budget	OC Support to OCPL	OC Support as % of Budget	State & Federal Aid	State & Federal Aid as % of Budget	Towns' Support	Towns' Support as % of Budget	OC Support to CHPL
93-94	393,934	304,481	77.29%	93,911	23.84%			142,834
94-95	433,586	341,773	78.82%	91,813	21.18%			157,000
95-96	509,591	405,000	79.48%	104,591	20.52%			175,000
96-97	596,901	461,436	77.31%	108,465	18.17%			195,000
97-98	608,887	479,146	78.69%	125,741	20.65%	4,000	0.66%	199,875
98-99	651,667	504,632	77.44%	143,035	21.95%	4,000	0.61%	213,467
99-00	635,024	506,002	79.68%	125,022	19.69%	4,000	0.63%	224,140
00-01	661,545	527,820	79.79%	129,725	19.61%	4,000	0.60%	242,071
01-02	685,814	575,039	83.85%	106,775	15.57%	4,000	0.58%	249,333
02-03	722,986	601,567	83.21%	117,419	16.24%	4,000	0.55%	249,333
03-04	847,550	723,715	85.39%	119,835	14.14%	4,000	0.47%	249,333
04-05	967,136	836,745	86.52%	121,391	12.55%	9,000	0.93%	249,333
05-06	1,028,600	890,670	86.59%	128,930	12.53%	9,000	0.87%	249,333
06-07	1,117,906	974,788	87.20%	134,018	11.99%	9,000	0.81%	249,333
07-08	1,089,318	949,641	87.18%	130,677	12.00%	9,000	0.83%	249,333
08-09	1,103,540	973,435	88.21%	121,105	10.97%	9,000	0.82%	249,333
09-10	1,567,542	1,440,952	91.92%	117,590	7.50%	9,000	0.57%	249,333

ATTACHMENT 7
OCPL NEW MAIN LIBRARY DEBT SERVICE

Year	Fiscal Year	Payments	Total OCPL Debt Service
1	09-10	\$544,171	\$544,171
2	10-11	\$544,171	\$1,088,342
3	11-12	\$544,171	\$1,632,513
4	12-13	\$544,171	\$2,176,684
5	13-14	\$544,171	\$2,720,855
6	14-15	\$544,171	\$3,265,026
7	15-16	\$544,171	\$3,809,197
8	16-17	\$544,171	\$4,353,368
9	17-18	\$544,171	\$4,897,539
10	18-19	\$544,171	\$5,441,710
11	19-20	\$544,171	\$5,985,881
12	20-21	\$544,171	\$6,530,052
13	21-22	\$544,171	\$7,074,223
14	22-23	\$544,171	\$7,618,394
15	23-24	\$544,171	\$8,162,565
Total		\$8,162,565	

ATTACHMENT 8: CHPL FACILITIES

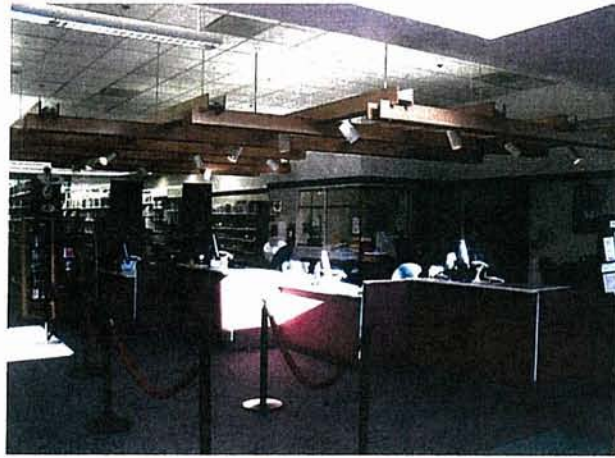


Chapel Hill Public Library



Library Entrance

ATTACHMENT 8: CHPL FACILITIES



Circulation Desk

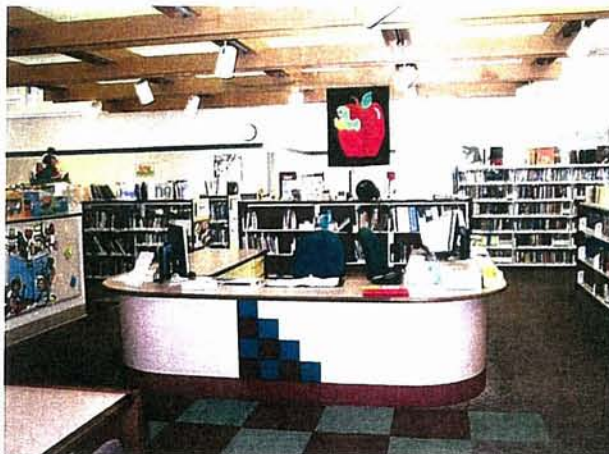


Main Stacks

ATTACHMENT 8: CHPL FACILITIES



Current Periodicals



Children's Desk

ATTACHMENT 8: CHPL FACILITIES

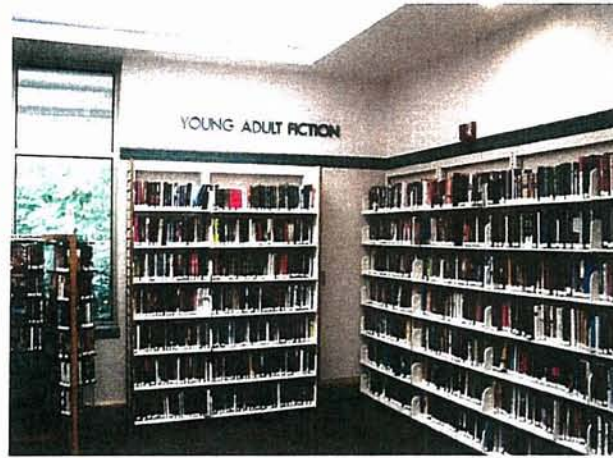


Children's Area



Picture Book Area

ATTACHMENT 8: CHPL FACILITIES



Teen Collection



Reference Desk

ATTACHMENT 8: CHPL FACILITIES



Reference Stacks



Computer Lab

ATTACHMENT 8: CHPL FACILITIES

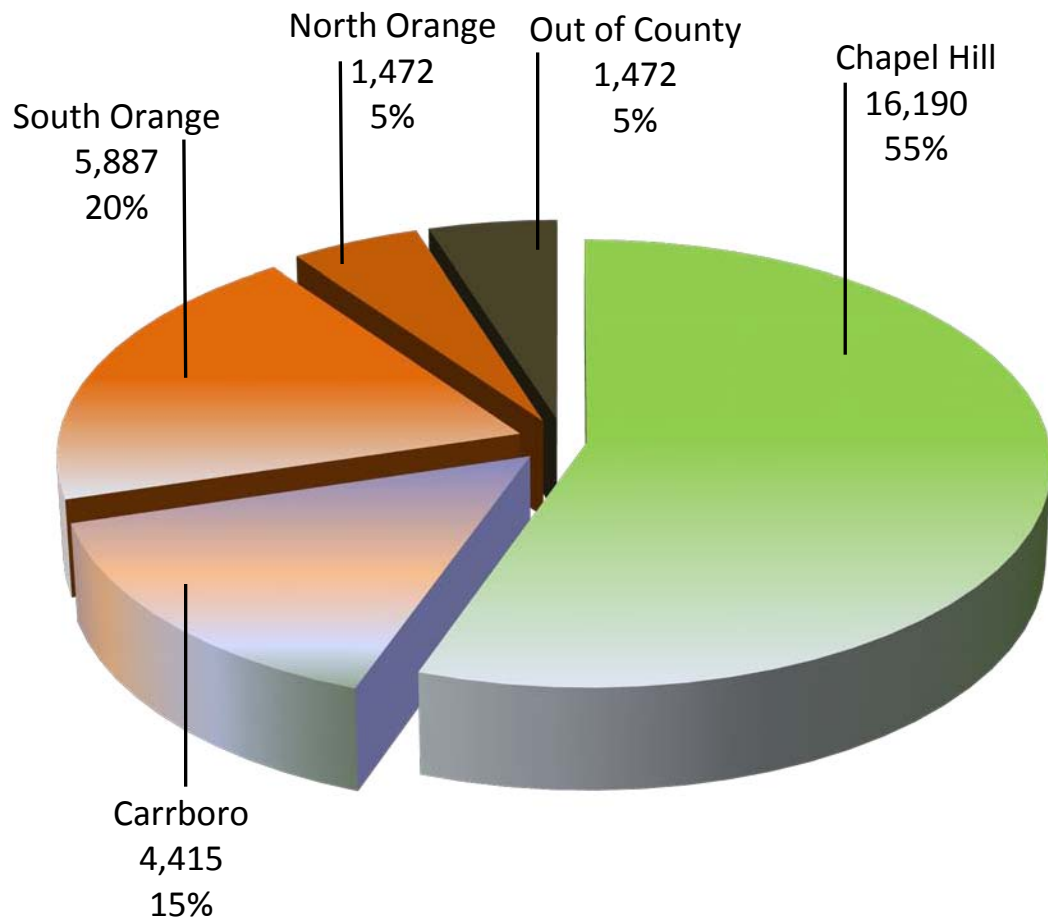


Quiet Reading Area



West and North Wall Carrels

ATTACHMENT 9: GEOGRAPHIC ANALYSIS OF CHPL REGISTERED PATRONS



CHPL has 29,436 registered borrowers.

ATTACHMENT 10: CHPL OPERATING BUDGET, 1993-2010

Year	CHPL Actual Budget	CH Support To CHPL	CH Support as % of Budget	State & Federal Aid	State & Federal Aid as % of Budget	OC Support to CHPL	OC Support as % of Budget
93-94	1,002,399	830,220	82.82%	29,345	2.93%	142,834	14.25%
94-95	1,217,965	1,031,620	84.70%	29,345	2.41%	157,000	12.89%
95-96	1,308,261	1,106,172	84.55%	27,089	2.07%	175,000	13.38%
96-97	1,376,475	1,153,011	83.77%	28,464	2.07%	195,000	14.17%
97-98	1,411,460	1,183,889	83.88%	27,696	1.96%	199,875	14.16%
98-99	1,512,878	1,260,470	83.32%	38,941	2.57%	213,467	14.11%
99-00	1,554,573	1,296,473	83.40%	33,960	2.18%	224,140	14.42%
00-01	1,714,819	1,438,000	83.86%	34,748	2.03%	242,071	14.12%
01-02	1,752,530	1,474,710	84.15%	28,487	1.63%	249,333	14.23%
02-03	1,892,982	1,609,365	85.02%	34,284	1.81%	249,333	13.17%
03-04	1,881,541	1,594,175	84.73%	38,033	2.02%	249,333	13.25%
04-05	1,978,842	1,692,723	85.54%	36,786	1.86%	249,333	12.60%
05-06	1,994,580	1,705,832	85.52%	39,415	1.98%	249,333	12.50%
06-07	2,074,503	1,784,928	86.04%	40,242	1.94%	249,333	12.02%
07-08	2,196,065	1,907,261	86.85%	39,471	1.80%	249,333	11.35%
08-09	2,234,327	1,948,257	87.00%	36,737	1.80%	249,333	11.14%
09-10	2,373,932	2,087,891	87.95%	36,708	1.55%	249,333	10.50%

ATTACHMENT 11: CHPL EXPANSION PROJECT DEBT SERVICE

Fiscal Year	2004 Issue	2006 Issue	2010 Issue*	Total CHPL Debt Service
04-05	9,263			9,263
05-06	43,525			43,525
06-07	42,900	31,865		74,765
07-08	42,275	139,488		181,763
08-09	41,650	135,701		177,351
09-10	40,900	131,913	432,078	604,891
10-11	40,088	128,125	1,584,286	1,752,499
11-12	39,213	124,337	1,541,079	1,704,629
12-13	38,338	121,307	1,497,870	1,657,515
13-14	37,400	118,276	1,454,663	1,610,339
14-15	36,463	115,246	1,411,454	1,563,163
15-16	35,463	112,216	1,368,247	1,515,926
16-17	34,463	109,185	1,325,040	1,468,688
17-18	33,463	106,307	1,281,831	1,421,601
18-19	32,463	103,352	1,238,624	1,374,439
19-20	31,463	100,322	1,195,415	1,327,200
20-21	30,431	97,292	1,152,208	1,279,931
21-22	29,381	94,186	1,109,001	1,232,568
22-23	28,319	91,061	1,065,792	1,185,172
23-24	27,225	87,917	1,022,585	1,137,727
24-25	26,125	84,735	979,376	1,090,236
25-26		81,553	936,169	1,017,722
26-27		63,182	892,962	956,144
27-28			849,753	849,753
28-29			806,546	806,546
29-30			763,337	763,337
Total	720,811	2,177,566	23,908,316	26,806,693
* Planned for Spring 2010. Estimated based on 6% interest rate				

ATTACHMENT 12: OCPL TASK FORCE REPORTS AND UPDATES

Task Force Charge	Recommendations	Updates and progress
Task Force 1 Report: 2001: In June 2000, the Board of Orange County Commissioners created a 14-member Library Services Task Force to “study library services in the County” and “prepare a plan for Orange County libraries by November 2001.”	<i>Task Force Recommendations:</i> 1) The operational funding level for Orange County public libraries be increased to the average state level of funding per capita over the next three years;	2000-01 \$7.95 per capita 2001-02 \$8.27 2002-03 \$8.63 2008-09 \$13.57 2009-10 \$19.80 In 2008-09, the average state level was \$22.12.
	2) New library projects be initiated simultaneously in the northern and southern parts of the county to the greatest extent possible and should be viewed as complementing rather than competing;	The Cedar Grove branch opened in April 2004 & Cybrary opened in August 2004.
	3) The Boards of Trustees for Hyconeechee and Chapel Hill Public Libraries meet at least annually and continue to explore areas of cooperation;	This has not been addressed between the two boards.
	4) The OC Heritage Center be built to house the records of the Social Services Department, the Health Department, the NC Collection of the OC Main Library, and the collections of the Historic Hillsborough Commission (Burwell School), the Hillsborough Historical Society and the OC Historical Museum.	The Heritage Center was discussed in the 2004 & 2007 Task Force Reports. Both reports recommend establishing a Heritage Center. In June 2009, the Board of Commissioners formed a workgroup to address the formation and sustainability of a Heritage Center. A preliminary report from the workgroup was presented at the October 20, 2009 BOCC meeting. An outside consultant is to be hired and report to the BOCC in May 2010.

ATTACHMENT 12: OCPL TASK FORCE REPORTS AND UPDATES

Task Force Charge	Recommendations	Updates and progress
<p><u>Task Force 2 Report: 2004:</u> In January 2004, the Board of Orange County Commissioners appointed a second Library Services Task Force to “review the Library Services Task Force report of November 2001” and “make recommendations to improve library services/facilities in Orange County specifically related to the expansion of the Central library in Hillsborough and the branch library in Carrboro.”</p>	<p><i>Task Force recommendations:</i> 1) Adopt a long range library facility plan that takes into consideration the needs of the entire county and is based on 20 year population projections;</p>	<p>This has not yet been addressed.</p>
	<p>2) OC Public Library develop a comprehensive 3-5 year strategic action plan to achieve a vision of county-wide equitable library service and resources for all citizens of Orange County;</p>	<p>The Orange County Director will begin work on the comprehensive plan following the move into the new main library facility.</p>
	<p>3) The construction of a new centrally located main library of 30,000 – 65,000 square feet based on the design population estimates of 2025;</p>	<p>A new main library facility of 23,500 square feet is scheduled to open in January 2010.</p>
	<p>4) The establishment of a southwest regional branch library combining the collections, staff, and services presently located at McDougle Middle School Carrboro Branch and the Century Center Cybrary. This branch should be centered in the town of Carrboro.;</p>	<p>The Board of Commissioners has created a placeholder in the CIP for a southwest branch, including a \$50,000 deposit in this account for the next 10 years.</p>

ATTACHMENT 12: OCPL TASK FORCE REPORTS AND UPDATES

Task Force Charge	Recommendations	Updates and progress
	5) Establish a Orange County Heritage Center to make accessible the local history materials now located in the main library as well as appropriate materials from other archival collections in the county such as from Burwell School, Carrboro Branch Library archives, Orange County Historical Museum and Hillsborough Historical Society;	The Heritage Center was discussed in the 2000, 2004, & 2007 Task Force Reports. All reports recommend establishing a Heritage Center. In June 2009, the Board of Commissioners formed a workgroup to address the formation and sustainability of a Heritage Center. A preliminary report from the workgroup was presented at the October 20, 2009 BOCC meeting. An outside consultant is to be hired and report to the BOCC in May 2010.
	6) That the Chapel Hill Public Library be recognized as a significant partner in, and primary service provider of, library services to southeastern Orange County;	The 2004 and 2007 library task force reports acknowledge the important role played by Chapel Hill Public Library in Orange County.
	7) That the Orange County Public Library establish a branch library to serve the central west area of the county centered in Cheeks Township, that will accommodate the future population growth of this area over the next 10–20 years;	This has not yet been addressed.
	8) That the population in the northwest area of the county centered in Cedar Grove Township be served by the Cedar Grove Branch Library in the Northern Orange County Human Services Center. This branch library needs to be monitored for possible	This has not yet been addressed.

ATTACHMENT 12: OCPL TASK FORCE REPORTS AND UPDATES

Task Force Charge	Recommendations	Updates and progress
	expansion;	
	9) That the rural community be evaluated for the establishment of cybraries or small branch libraries to provide access to library resources at these more distant sites.	This has not been addressed.
<u>Task Force 3 Report: 2007:</u> In January 2007, the Board of Orange County Commissioners created a third Library Services Task Force to review past task forces' work, address Orange County's main library and branch facility needs, and debt issuance plans for same.	<i>Task Force Principles:</i> 1) develop a regional approach to library services; 2) collaborative county-wide library service plan; 3) development of a 3-5 year plan to address immediate needs.	
	<i>Task Force Recommendations:</i> 1) The establishment of the Heritage Center and the construction of a south west Library Branch;	The Heritage Center was discussed in the 2000, 2004, & 2007 Task Force Reports. All reports recommend establishing a Heritage Center. In June 2009, the Board of Commissioners formed a work-group to address the formation and sustainability of a Heritage Center. A preliminary report from the work-group was presented at the October 20, 2009 BOCC meeting. An outside consultant is to be hired and report to the BOCC in May 2010. The Board of Commissioners has created a placeholder in the CIP for a southwest branch, including a \$50,000

ATTACHMENT 12: OCPL TASK FORCE REPORTS AND UPDATES

Task Force Charge	Recommendations	Updates and progress
		deposit in this account for the next 10 years.
	2) A study of advantages and disadvantages of a county-wide jointly operated technical support system;	This has not yet been addressed.
	3) ongoing reviews of progress toward meeting library facility made and service standards goals.	During the 2009 budget process, the Board of Commissioners stood firm in their commitment to raising the minimum service level of libraries and adopted a budget reflective of this commitment. In addition, the BOCC pledged further support by voting to bring the OCPL libraries to the state average in per capita spending with the 2010-11 budget. The state average per capita in 2008-09 was \$22.12.

Minutes from the BOCC meeting on May 20 2008: “A motion was made by Commissioner Nelson, seconded by Commissioner Gordon to accept the Library Services Standards and Facilities Needs Matrix developed by 2007 Library Services Task Force; and direct County and Library management to begin discussions with the Town of Chapel Hill for a consolidated county-wide library system and for greater collaboration.”

ATTACHMENT 13: FUNDING FORMULA

Year	OC's Operating Budget with State Aid	OC Library System Operating Support without State Sid	Orange County Library Main Support	Orange County Library Branch Support	% change in Library Main Support Budget by Year from OC	CH Operating Budget	Actual OC's Support to Chapel Hill	Formula: OC's Support to CH if Using OC Main Library Support Budget % Change
1993-94	393,934	292,469	292,469			1,002,399	142,834	
1994-95	441,711	346,309	346,309		18.41%	1,217,965	157,000	169,128
1995-96	440,188	335,164	335,164		-3.22%	1,308,262	175,000	164,075
1996-97	481,959	379,080	312,771	66,309	-6.68%	1,376,475	195,000	152,383
1997-98	604,829	475,684	402,807	72,877	28.79%	1,411,460	199,875	208,517
1998-99	626,710	478,719	389,388	89,331	-3.33%	1,512,878	213,467	201,858
1999-2000	644,304	493,313	399,979	93,334	2.72%	1,554,573	224,140	207,665
2000-01	667,885	516,813	421,259	95,554	5.32%	1,714,820	242,071	219,589
2001-02	693,543	546,607	445,304	101,303	5.71%	1,752,530	249,333	233,407
2002-03	710,195	574,680	467,438	107,242	4.97%	1,892,979	249,333	245,800
2003-04	821,093	680,675	569,622	111,053	21.86%	1,881,541	249,333	300,305
2004-05	907,403	763,918	501,799	262,119	-11.91%	1,978,822	249,333	270,618
2005-06	1,005,887	854,171	594,586	259,585	18.49%	1,994,580	249,333	316,722
2006-07	1,092,204	936,508	595,803	340,705	0.20%	2,074,486	249,333	317,232
2007-08	1,086,659	931,063	614,029	317,034	3.06%	2,196,050	249,333	324,859
2008-09	1,138,875	975,079	654,835	320,244	6.65%	2,237,643	249,333	341,429
2009-10	1,567,542	1,407,952	1,089,872	318,080	66.43%	2,373,432	249,333	507,072

Formula: For illustration purposes, formula was applied to Chapel Hill contribution from history of OC support dating back to FY 93-94. Chapel Hill Public Library Funding is incrementally and cumulatively affected by the % change in operational support to Orange County Main Library.