

98

MEMORANDUM

TO: Mayor and Town Council

FROM: W. Calvin Horton, Town Manager

SUBJECT: Response to the Library Needs Assessment Task Force Report

DATE: November 22, 1999

The attached resolution and budget ordinance would authorize the Manager to hire a consultant to study long term library service needs of the community.

BACKGROUND

On October 13, 1997, the Town Council appointed a Library Needs Assessment Task Force to "study what the community wants from its public library and the library's short and long-term service needs" (Attachment A).

The 13-member Task Force presented its final report to the Town Council on June 14, 1999 (Attachment B). The final recommendation of that Task Force was to recommend that the Town hire a consultant to advise on space implications of the report. At that time, the Town Council referred the report to the Manager and Library Board.

On September 29, the Library Board reviewed the Task Force report and voted unanimously to support the Task Force recommendation to hire a consultant (Attachment C).

The Task Force report has also been presented by its members and staff at regular meetings of the Friends of the Chapel Hill Public Library and the Chapel Hill Public Library Foundation. Both organizations expressed support for the report and the extended work of the Task Force members.

DISCUSSION**I. Review of key points and recommendation in the Library Needs Assessment Task Force report.**

Over eighteen months, the Task Force used an abbreviated version of the Public Library Association Service Measures and organized local information to: identify community needs and values; discuss how the library can make a contribution toward meeting those needs and values; and consider allocation of library resources.

The Task Force also used formal yardsticks to measure those priority services. These included "Minimum Guidelines for North Carolina Public Libraries," local population figures for Chapel Hill, and professional standards for space utilization in libraries.

Based on its study of community needs, current library services and available resources, the Task Force report highlights points to be considered in planning for library services through 2005:

- The library has a history of heavy use.
- 46% of library use is by non-Chapel Hill residents.
- Patrons have access to an adequate print collection.
- There is an inadequate non-print collection
- There is an inadequate technology program.
- The library will need to serve an increasingly diverse population in the future.
- Whether the Town chooses to maintain or expand the current level of service, additional resources will be required.

The Task Force report included two separate option paths for the Town Council to consider in planning future library services. Option I assumes that the current level of library service will be maintained through the year 2005. Option II assumes that the Town would expand services in order to meet minimum State recommended guidelines or to respond to the needs of the Town's minority population. Additional resources needed to either maintain (Option I) or expand (Option II) the current level of library service are summarized below:

ADDITIONAL RESOURCES NEEDED

	<u>Option I</u> (Maintain Services)	<u>Option II</u> (Expand Services)
Staff	4.25 full-time employees	12.5 full-time employees
Facilities	1,803 sq. ft	5,365 sq. ft.
Annual Operating Costs	\$177,950	\$457,826
Capital Funding	\$ 17,850	\$ 85,850

The Task Force recommended that a consultant should be employed to review the findings of the report and to advise the Town further on space implications included in its report.

II. Review of key points and recommendations made by the Library Board about the Task Force report.

On September 29, the Library Board reviewed the Task Force report and voted unanimously to support the Task Force recommendation to hire a consultant. However, they felt the consultant's charge should be expanded to include a study of staff, collection and technology needs, as well as facilities, as recommended by the Public Library Association Service Measures.

Key points of the Library Board's response to the Task Force report include:

(100)

- That the Town Council should plan to expand library services in the future.
- Agreement that additional space will be needed, whatever option path the Council should choose to pursue for the library.
- Because non-Chapel Hill residents use the library heavily (46% of use), the Town should include some Orange County population when projecting service use per capita, not just Chapel Hill population.
- Recommendation that Orange County and Chapel Hill budgets begin to reflect increases associated with either maintaining or expanding library services as soon as possible.

III. Next steps.

The Task Force report includes a significant amount of detail regarding library services, and the committee work has been thorough and insightful. To its credit, it is one of only two groups in North Carolina to have completed the Public Library Association Service Measures process. In August, the State Librarian indicated that grants will be offered to libraries to hire consultants to complete the same process this Task Force has just completed.

Master Plan: Since the Library Needs Assessment Task Force report was submitted, a citizen work group has completed a draft of a proposed revision to the Town's Comprehensive Plan. This plan comments on the long term service needs of the Town, including library services. It calls for a Master Plan for Library Service, which coincides with the recommendations by both the Library Needs Assessment Task Force and the Library Board.

We agree that the Town needs a Master Plan for long term library service development. We believe that such a plan should include:

- a review of the Library Needs Assessment Task Force's proposed services,
- projected costs to maintain and to expand library services,
- an update of the current library building program,
- a timetable of activities to maintain library services, and
- a timetable of activities to expand library services.

Consultant: We agree with the Task Force and the Library Board that a library consultant should be selected to prepare the proposed Master Plan. By Town Code, the Library Board is responsible for advising the Town Council on library operations and capital improvements. Therefore, we recommend that the Manager be authorized to advertise for, and negotiate a contract with, a library consultant to work with the Library Board and staff to develop a master plan for Library services through 2010.

Based on the scope of the project outlined above, we believe that the study would cost \$15,000-\$20,000 to complete over the next year. Adequate funds exist in the Library Gift Fund to pay this consultant fee. The attached budget ordinance would appropriate \$20,000 in the Library Gift Fund budget for this purpose.

Project Timeline: We believe that a draft Master Plan would be available for the Town Council's review by early 2001. Tasks to be completed by this time would include: completion of the consultant selection process (2-3 months); information gathering (4-5 months); writing the report (2-3 months); and Library Board review and cover memo preparation (1-2 months).

RECOMMENDATIONS

Library Needs Assessment Task Force's Recommendation: That the Town employ a consultant to advise it further on the space implications (in its) report.

Library Board's Recommendation: That the Town Council employ a consultant to advise it further on the implications regarding staff, facilities, collection and technology included in the Library Needs Assessment Task Force report.

Manager's Recommendation: That the Council authorize the Manager to prepare a Request for Proposal (RFP) for library consulting services for review of resources needed to maintain and to expand library services, updating of the current library building program and development of timetables through 2010 to maintain and expand library services. That the Manager be further authorized to negotiate a contract with the consultant selected and that the consultant fee not exceed \$20,000 and be paid from Library Gift funds.

ATTACHMENTS

1. Attachment A – October 13, 1997 memo from the Library Board of Trustees and the Chapel Hill Public Library Foundation. (p. 7)
2. Attachment B – June 14, 1999 Report from the Library Needs Assessment Task Force. (p. 10)
3. Attachment C – October 15, 1999 recommendations from the Chapel Hill Public Library Board of Trustees. (p. 22)

(102)

A RESOLUTION AUTHORIZING THE MANAGER TO HIRE A CONSULTANT TO PREPARE A MASTER PLAN OF LIBRARY SERVICES FOR THE CHAPEL HILL PUBLIC LIBRARY (99-11-22/R-7)

WHEREAS, the Library Needs Assessment Task Force was appointed by the Town Council to study community needs and short and long term needs for library service; and

WHEREAS, the Library Needs Assessment Task Force report submitted report to the Town Council on June 14 recommends that a consultant be hired to study library space needs; and

WHEREAS, the Library Board of Trustees has reviewed the Library Needs Assessment Task Force report and recommends that a consultant be hired to study issues associated with staff, facilities, collection and technology; and

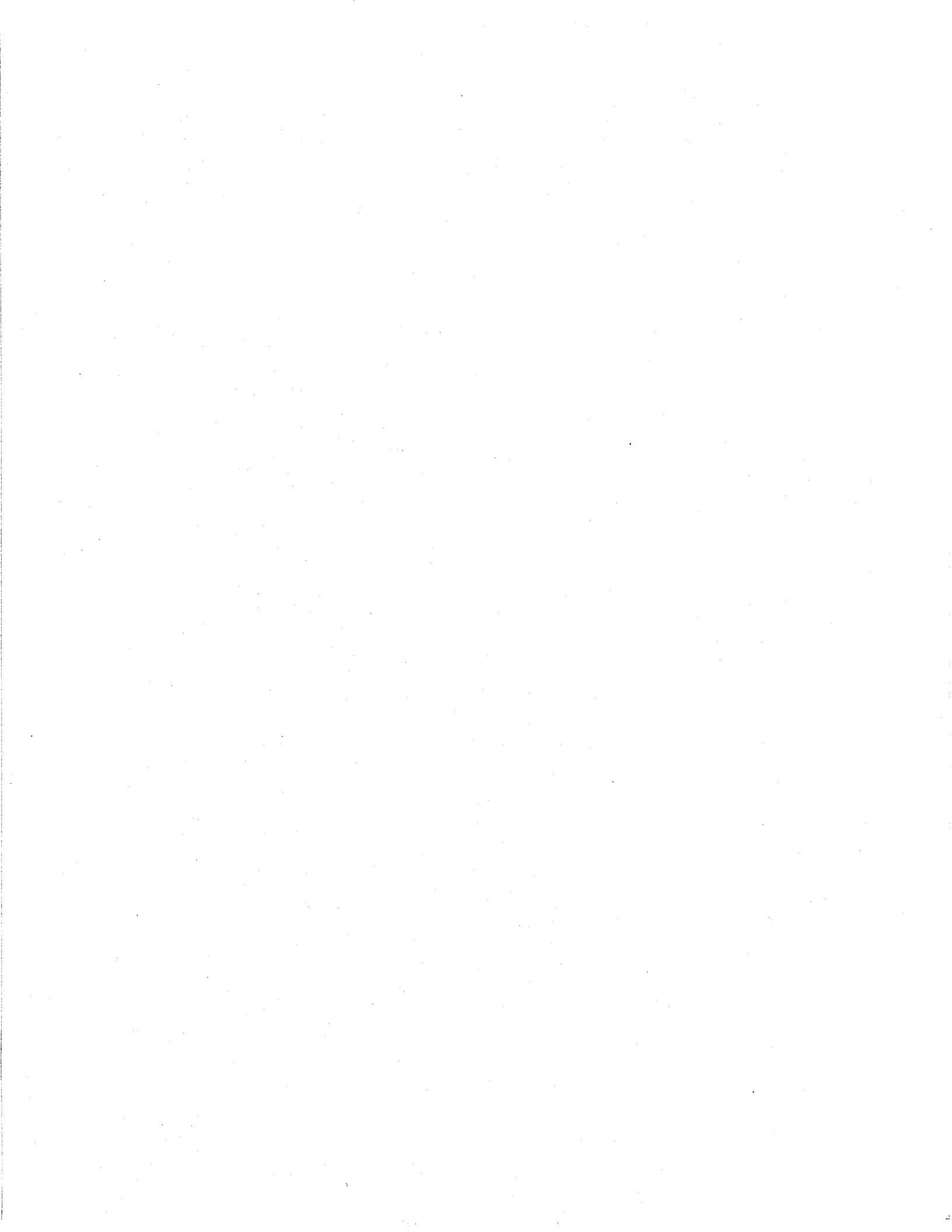
WHEREAS, the Town's Comprehensive Plan recommends that a Master Plan for Library Service be developed to plan for long term library needs; and

WHEREAS, the Town Code charges the Library Board with advising the Town Council on library operations and capital improvements; and

WHEREAS, library gift funds currently exist that may be used to pay for a consultant to prepare a Master Plan;

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that the Town Council authorizes the Manager to prepare a Request for Proposal (RFP) for library consulting services and to negotiate a contract with the consultant, not to exceed \$20,000 paid from Library Gift funds.

This the 22nd day of November, 1999.



AN ORDINANCE TO AMEND "THE ORDINANCE CONCERNING APPROPRIATIONS AND THE RAISING OF REVENUE FOR THE FISCAL YEAR BEGINNING JULY 1, 1999 (99-11-22/O-2)

BE IT ORDAINED by the Council of the Town of Chapel Hill that the Budget Ordinance entitled "An Ordinance Concerning Appropriations and the Raising of Revenue for the Fiscal Year Beginning July 1, 1999" as duly adopted on June 14, 1999, be and the same is hereby amended as follows:

ARTICLE I

<u>APPROPRIATIONS</u>	<u>Current Budget</u>	<u>Increase</u>	<u>Decrease</u>	<u>Revised Budget</u>
LIBRARY GIFT FUND	35,000	20,000		55,000

ARTICLE II

<u>REVENUES</u>	<u>Current Budget</u>	<u>Increase</u>	<u>Decrease</u>	<u>Revised Budget</u>
LIBRARY GIFT FUND Fund Balance	0	20,000		20,000

This the 22nd day of November, 1999.

(104)

MEMORANDUM

TO: The Mayor and Town Council

FROM: Fred Black, Library Board of Trustees
Bob Woodruff, Chapel Hill Public Library Foundation

SUBJECT: Establishment of a Library Needs Assessment Task Force

DATE: October 13, 1997

Attached is a resolution that would create a Library Needs Assessment Task Force to study what the community wants from its public library and the library's short and long-term service needs.

DISCUSSION

Need for information: The Library Board of Trustees and the Chapel Hill Public Library Foundation believe that more information is needed to direct Chapel Hill's public library resources and development over the next 5-10 years. In particular, the Library Board of Trustees wants patron input regarding desirable services. The Chapel Hill Public Library Foundation Board wants information to help it identify long term resource needs in order to effectively target fund raising activities.

However, staff is currently working with service measures that are over 10 years old. These measures do not include resource needs and services such as internet service, computers, fax machines, etc.

New methods of analyzing service needs are about to be published. Staff has informed us that the Public Library Association's new "Service Responses" are about to be published. They replace the old service measures and are intended to help libraries (1) provide services that are more closely connected to needs that exist in the community and (2) understand the resource allocation issues that go along with decisions regarding the library's program of service.

New standards are also being prepared by the North Carolina Library Association Standards Committee to quantify resource needs within each service response. Both the service responses and the proposed standards recognize new technology needs of libraries not included in previous methods of analysis.

Task Force charge: We propose that the Town Council establish a Library Needs Assessment Task Force to work with the new service measures to identify priority services and the resources needed to provide them and report back to the Town Council within a year.

Task Force representation: The Task Force should have representation from the Library Board of Trustees, Chapel Hill Public Library Foundation, the Friends of the Chapel Hill Public Library and the public. To keep the size manageable, it is recommended that each organization be asked to select 3 representatives, plus two from the Town Council, for a total committee of 14 members.

We recommend that the general public representation include members of the university community, to take advantage of their background in library science and the newest technology concerns already facing the university library environment. The representatives may also be sensitive to opportunities for resource sharing between the university and public library.

If the Town Council wishes, Ken Broun, former mayor of Chapel Hill, has indicated a willingness to chair this Task Force. He is currently on the Public Library Foundation Board and would be one of the representatives from that group.

Town Support: The Task Force will need staff support which would be provided by the current library staff. We believe that staff has a good understanding of what is necessary to achieve a good needs assessment. Therefore it would not be necessary to employ an outside consultant.

The Task Force may wish to visit other libraries in the State and may incur some minimal travel expense, as well as costs associated with meetings, such as packet preparation, mailing costs, etc. However, we do not anticipate expenses in excess of \$500 to complete this work.

CONCLUSION

The current tools used to measure library service are out-dated and should be replaced with new service measures which include technology. We believe that a Task Force would provide long term planning information and would allow the Library Board of Trustees to identify services needed, the Foundation to target funding raising for and the Town to measure its library services against similar communities nationally.

RECOMMENDATION

That the Town Council establish a Library Needs Assessment Task Force to identify the short and long term needs of the patrons and the library and to report back within a year; that the Task Force include representation from the Town Council (2), Library Board of Trustees (3), Chapel Hill Public Library Foundation (3), the Friends of the Chapel Hill Public Library (3) and the university and community at large (3); and that they follow the format and guidelines set out in the new Public Library Association Service Measures and in the recently revised North Carolina Library Standards.

A RESOLUTION REGARDING ESTABLISHMENT OF A LIBRARY NEEDS ASSESSMENT TASK FORCE FOR THE CHAPEL HILL PUBLIC LIBRARY (97-10-13/R-10)

WHEREAS, the Library Board of Trustees and the Chapel Hill Public Library Foundation believe that more information is needed to direct Chapel Hill's public library resources and development over the next 5-10 years; and

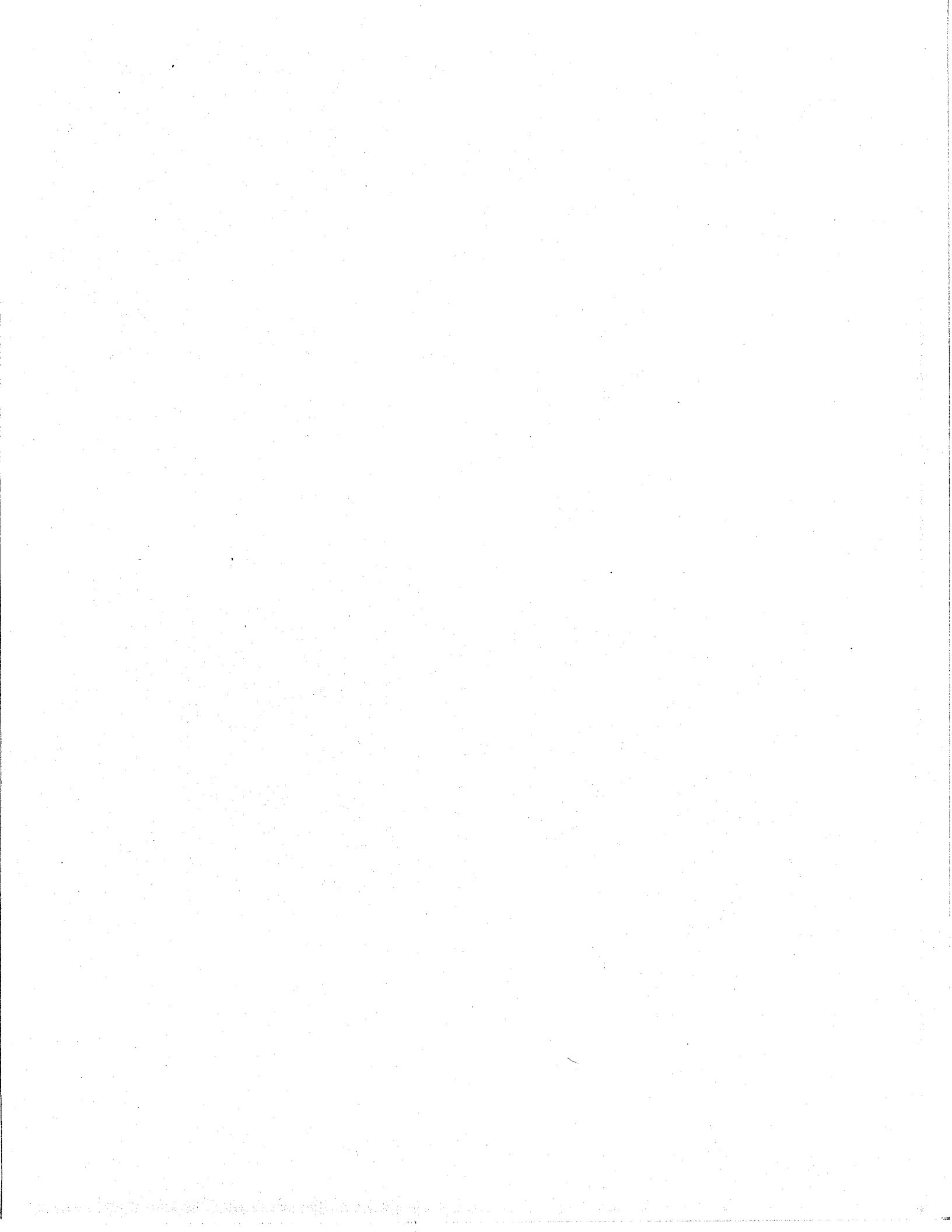
WHEREAS, the Public Library Association and the North Carolina Library Association's Standards Committee have developed new performance measures which include new technologies and services now available to libraries; and

WHEREAS, the current service measures used to evaluate library performance are 10 years old and do not include new technology measures;

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that the Town Council establishes a Library Needs Assessment Task Force to identify community needs and short and long term public library service needs and report back within a year.

BE IT FURTHER RESOLVED that the Task Force include representation from the Town Council (2), Library Board of Trustees (3), Chapel Hill Public Library Foundation (3), the Friends of the Chapel Hill Public Library (3) and the university and community at large (3); and that they follow the format and guidelines set out in the new Public Library Association Service Measures and in the recently revised North Carolina Library Standards.

This the 13th day of October, 1997.



Please insert pages 1-12 into June 14, 1999 Agenda Packet #2a-b, to correct errors in the memo and Tables I and II. Thank you. Ken Broun

101

ATTACHMENT B

AGENDA # 12a-b

MEMORANDUM

TO : The Mayor and Town Council
FROM : Library Needs Assessment Task Force
DATE : June 14, 1999
SUBJECT : Committee Report

On October 13, 1997 the Town Council appointed a Library Needs Assessment Task Force to "study what the community wants from its public library and the library's short and long-term service needs" (Attachment C). Below is the Executive Summary and final report of the Task Force.

EXECUTIVE SUMMARY

The Library Needs Assessment Task Force met regularly over the past 18 months to identify the community's needs and desires for services and to measure both how the library was currently responding and how it might respond to the community in the future. The Task Force assessed both the nature of the Chapel Hill community and the services provided by the library. It found a heavily used library with an adequate print collection and an excellent staff, but an inadequate non-print collection and a woefully deficient technology program. Some of the library's programs, particularly those addressing the needs of a growing non-English speaking population, were also found lacking.

A growing population will require some increases in all aspects of the library's collections and programs, even if no effort is made to improve either. Far greater increases are needed to meet both the desires of the community and, especially in the area of technology, the new *Guidelines for North Carolina Public Libraries* (Attachment D). Even minimal increases in the library's services will require some additional staff and space. Improvements that will truly provide the kind of services this community both wants and deserves will require significant increases in staff and considerable additional space.

Therefore, the Task Force has set forth two option paths for the Council. The first outlines the library's requirements if what is sought is simply to maintain current levels of services. The second outlines the requirements if what is sought is an expansion of those services.

The Task Force recommends that the Town employ a consultant to advise it further on the space implications of this report.

BACKGROUND

Purpose: On October 13, 1997, the Library Board of Trustees and the Chapel Hill Public Library Foundation requested a study of Chapel Hill's public library resources and development over the next 5-10 years. In particular, the Library Board of Trustees wanted patron input regarding desirable services. The Chapel Hill Public Library Foundation Board wanted information to help it identify long term resource needs in order to effectively target fund raising activities.

Appointment: In response to that request, the Town Council appointed a 13 member Task Force to study these issues (Attachment E: "Library Needs Assessment Task Force Members"). Task Force representatives were selected from the Town Council, the Library Board, the Friends of the Chapel Hill Public Library, the Chapel Hill Public Library Foundation, the University of North Carolina and members at large.

Charge: The Town Council charged the Library Needs Assessment Task Force to:

- 1) Utilize the new Public Library Association's "Service Responses" to (a) identify services most desired by the community and (b) understand the resource allocation issues that go along with providing those services.
- 2) Utilize the *Guidelines for North Carolina Public Libraries* (Attachment D) to measure current and future library service levels, and
- 3) Report to the Town Council within a year.

Throughout the process, the Task Force met regularly on the fourth Wednesday of each month.

METHOD OF PROCEEDING

During the course of its work, the Task Force gathered data from a number of sources.

Carolina Pulse Poll: The first data came from seven questions that were a part of a telephone survey, The Carolina Pulse Poll, administered by the UNC School of Journalism and Mass Communication in late February 1998. Approximately 515 citizens of Chapel Hill and Carrboro were part of the sample. (Attachment F: "Carolina Pulse Poll.")

The responses to the poll demonstrated the high use made of the Chapel Hill Public Library by the community; approximately 68 % of the respondents had used the Library during the last twelve months (compared to the national average of 53%). As expected, the largest number of respondents (74%) reported using primarily books from the Library.

Committee Work: In addition to the Carolina Pulse Poll information, every Task Force member served on one of three data-gathering subcommittees. First, the **Community Assessment Subcommittee** analyzed community needs based on current trends and

planning projections and reports. The Library Assessment Subcommittee then identified current library services and projected services based on same level of services to 2002-03. Finally, the Resources Subcommittee reviewed the resources needed to meet minimum service levels identified by the *Guidelines for North Carolina Public Libraries*. The reports of each committee were reviewed and discussed by the Task Force as a whole, with an eye to the strengths, weaknesses, opportunities and threats posed by the findings of the reports.

Assumptions in Data Development: In developing the information, the Task Force agreed to:

1. Use service figures that would allow comparison with other area libraries.
2. Use the most current State Library-reported service figures for all North Carolina libraries. The most current data is found in the *Statistics and Directory of North Carolina Public Libraries: July 1, 1997-June 30, 1998* (Attachment G).
3. Use 1997-98 as the baseline year for data projections.
4. For final data preparation, use 2005 as the ending date for data projections.
5. Accept the Chapel Hill Planning Department's population figure for 1997-98 (43,423).
6. For final data preparation, use the Chapel Hill Planning Department projected 2005 population figure (50,146) in projecting services per capita (Attachment H).

Community and Library Assessments

Community Assessment

Libraries must meet the needs and desires of the community they serve. It is critical that they be aware of changes in the nature of that community. An important part of our work included a community assessment. To do this, the Community Subcommittee used the community assessment instrument developed by the Public Library Association in its recent book *Planning for Results: A Library Transformation Process*.

The resulting Community Assessment (Attachment I: "Community Scan") describes the community as it is now and as it is likely to become in the next several years. Sources of data used by the Subcommittee included the North Carolina Office of State Planning, the *County and City Data Book*, the *North Carolina Department of Commerce Community Profile*, the Office of the University Registrar, and the *Synthesis Report* being developed by the Shaping Orange County's Future Task Force. Once the Subcommittee gathered the descriptive data, the Task Force attempted to extract meaning via a traditional SWOT (strengths, weaknesses, opportunities, threats) analysis.

Highlights of the Community Assessment are:

- 1) The population of the Town of Chapel Hill is expected to increase from the present 43,423 to 50,146 by the year 2005 (Attachment H).
- 2) The community will increasingly use information technology.
- 3) There is growth in the non-English speaking population.
- 4) The gap between economic haves and have-nots is expected to increase.
- 5) The education level of the population will remain high or increase.
- 6) The University will expand both in student population and in its physical presence, increasing the transient component of our community.
- 7) The town's boundaries are expanding.
- 8) There is an increased demand for public meeting spaces.
- 9) Use of public resources will continue to be under pressure as desire for government services increases but the non-individual tax base, especially business and industrial, does not significantly grow.

Library Assessment

The Library Assessment Subcommittee also used an instrument from the Public Library Association's *Planning for Results: A Library Transformation Process*. The purpose of this assessment is to look at library collections, staff, facilities and technology and then 1) describe what is current reality, 2) identify trends for the future, and 3) describe what reality will be in five years if the Library continues on its current path.

The material used in the Library Assessment (Attachment J: "Library Scan") was gathered from the Town's annual and quarterly reports, Town budgets, the *Statistics and Directory of North Carolina Public Libraries 1997-1998*, and the *Guidelines for North Carolina Libraries*.

The data displayed include figures from five years prior to 1997-98, and include the most recent comparable library service statistics available state-wide. They also include future service projections based on current growth, and a projected population of 53,021 by the year 2002-03. In all cases, the Subcommittee used conservative estimates of growth and need.

Highlights of the Library Assessment are:

- 1) The Library is strongest in print resources for both children and adults.
- 2) The Library faces serious problems in the future with lack of space to shelve the collection.
- 3) Available resources do not permit the library to meet minimum State guidelines for public access to Internet stations.
- 4) Increasing the number of terminals would require additional space and computer support assistance, and



- 5) It is projected that additional full time employees (FTEs) would be needed to maintain current services at the current ratio of staff per capita.
- 6) In addition to serving residents of the Town of Chapel Hill, 46% of the Chapel Hill Public Library's use is by Orange County residents who live outside of the Town.

Using the data from the Library Assessment, the entire Task Force participated in an analysis of the Library's strengths, weaknesses, opportunities and threats (SWOT). In brief, the SWOT analysis suggested:

- 1) A library building that is inadequate to meet current demand and utilization, but is capable of being expanded.
- 2) An adequate English-language print collection, but an inadequate non-English print collection.
- 3) An inadequate non-print collection (compact discs, tapes, etc.).
- 4) Inadequate computer access.
- 5) Strong community support.
- 6) Heavy community use, as illustrated by the highest per capita use in the state (15.5 materials p/cap in 1997-98).
- 7) High expectations for service from the public.
- 8) Excellent staff but too few in number to meet needs and expectations of the community.
- 9) Financial resources are inadequate to address both current and future space, technology, staffing, collection and service needs.

RESOURCE IMPLICATIONS AND OPTIONS

The original Community and Library Assessments were based on a projected population of 53,021 by the year 2002-03. Later information received from the Chapel Hill Planning Department changes these figures. Therefore, the Task Force's final projections and recommendations are based on a corrected population figure of 50,146 by the year 2005.

Conclusions: Based on our thorough review of both the Library and community contexts, the Task Force has arrived at several conclusions that have heavily influenced the options and resource implications outlined in this section of the report.

- The level of demand for library services created by the rate of population growth in Chapel Hill and Southern Orange County already outpaces available resources (money, space, staff) and will continue to do so.
- The requirement that the 21st century public library provide access to adequate per capita levels of technology represents a resource planning and allocation challenge.
- The Town's changing minority population represents both an enriching opportunity and an additional service pressure for the Library.

Please insert pages 1-12 into June 14, 1999 Agenda Packet #2a-b, to correct errors in the memo and Tables I and II. Thank you. Ken Broun

- Under any scenario, the current facility is already proving inadequate for meeting the space needs of the Library.

Options: Given these implications, the Task Force has identified two separate option paths for consideration by the Town Council. (Attachment A: "Option Path I: To Maintain 1997-1998 Levels of Library Services." Attachment B: "Option Path II: To Expand 1997-1998 Levels of Library Services.")

Option I assumes that the goal of the Town over the next several years would be simply to maintain the Library's current level of service. This option path calls for increased levels of resources--but only to the extent necessary to cope with the growing town population and concomitant demand for services.

Option II assumes that the Town would expand the Library's collections, technology, staff and programs to 1) conform more fully with the population-linked standards established by in the *Guidelines for North Carolina Public Libraries* and 2) better respond to the service needs of the Town's minority population.

Operating and Capital Funding options are based on current costs. Options I and II do not include costs associated with inflation, employee benefits nor capital costs associated with additional space needs. Operating Funding costs cited in both option paths are in addition to the Library's existing operating costs per year.

Not surprisingly, the resource implications are considerably greater under the second option. However, it should be noted that just to maintain current levels of service will require space that is presently not available in the Library.

Resource implications identified in Options I and II are summarized below:

	Staff	Facility	Operating Funding p/yr	Capital Funding
Option I (Maintain)	4.25 FTE	1,803 square ft.	\$177,950	\$ 17,850
Option II (Expand)	12.5 FTE	5,365 square ft.	\$457,826	\$ 85,850

Library goals and objectives included in Option I (Maintain) and Option II (Expand) are identified in the attached "Summary" (Attachment K). Key issues of the Summary include:

- Either maintaining or expanding services will require additional space, staff and funding.
- An increasingly diverse community will require increasingly diverse staff.

- Library programming should include programs for adults, marketed to attract non-users.
- Expanded use of technology will significantly increase resource needs in the future.

RECOMMENDATION

Whatever option path the Council selects--to maintain current services or to expand the Chapel Hill Public Library's collection, technology and programs--additional space will be necessary. Determining the precise nature of such additional space and analyzing possible means for financing its purchase or construction are beyond both the scope of the charge of this committee and any expertise it might have. We recommend that the Council select a professional consultant to advise it on such matters.

Attachment A: "Option Path I: To Maintain 1997-1998 Levels of Library Services."

Attachment B: "Option Path II: To Expand 1997-1998 Levels of Library Services."

Attachment C: Town Council memo "Establishment of a Library Needs Assessment Task Force (October 13, 1997)."

Attachment D: Guidelines for North Carolina Public Libraries, adopted November 13, 1998.

Attachment E: Library Needs Assessment Task Force members.

Attachment F: Carolina Pulse Poll.

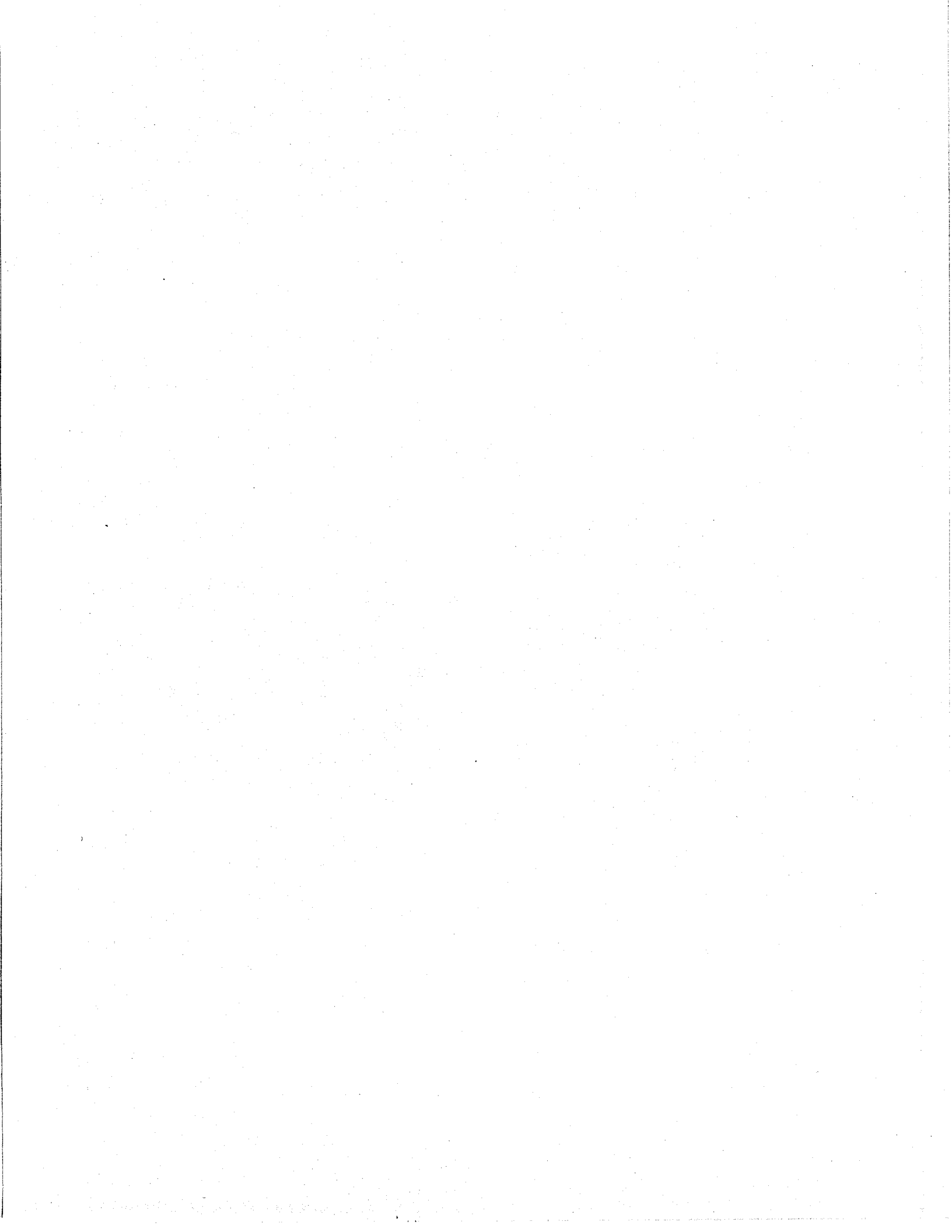
Attachment G: Statistics and Directory of North Carolina Public Libraries: July 1, 1997-June 30, 1998.

Attachment H: Chapel Hill Historical & Projected Population 1900-2025.

Attachment I: Community Scan

Attachment J: Library Scan

Attachment K: Summary



1A

OPTION PATH I: TO MAINTAIN 1997-1998 LEVELS OF LIBRARY SERVICES IN THE FACE OF A GROWING TOWN POPULATION

Population Assumption = 50,146
 Timeframe = From FY 2000 to FY 2005 (6-year horizon)

RESOURCE IMPLICATIONS			
ACTION REQUIRED TO MAINTAIN 1997-1998 LEVEL OF SERVICE	STAFF	FACILITY	FUNDING
MATERIALS/COLLECTIONS *			Inflation/benefits/capital expenditures for space not included
<ul style="list-style-type: none"> Maintain 2.6 books per capita, increasing 97-98 book collection by 17,661 items. Maintain 1997-98 .1 misc. collection (tapes, cds, periodicals, etc.) per capita, increasing 97-98 collection by 1,112 items. 	To: Select materials: Add .5 full-time Librarian I Prepare materials: Add .5 full-time Processing Technician and .25 full-time Librarian I cataloger. Shelf materials: Add 1 full-time shelving/page position.	Shelving: Add 2,085 linear feet of shelving, or 48 double-sided shelves. Space: Shelving would require 1228 sq. ft. currently not available in the library. New book display would require 200 sq. ft.	Would require an additional: --\$74,000 p/yr for books --\$10,000 p/yr for tapes, cds, periodicals, microforms, etc. --\$42,000 p/yr for staff --\$5,000 for all shelving
Sub-total	2.25 full-time staff	1,428 square feet	\$126,000 operating; \$5,000 capital
PROGRAMMING **			
<ul style="list-style-type: none"> Provide programs based on user-demand and general community interests. Provide children's staff at 97-98 rate (.00009 staff p/capita) to offer programs at current level. Provide reference staff at 97-98 (.00013 reference staff p/capita). Structure programs to emphasize community's ethnic diversity. 	--NA --Add .5 full time Children's Library Assistant III for programming and patron assistance. --Add 1 full time Reference Library Assistant III to assist increased patron population. --NA	--NA --1 workstations, 90 sq. ft. --1 work station, 90 sq. ft. --1 supplies closet, 70 sq. ft. --NA	--NA --\$10,722 p/yr for children's staff. --\$1,200 for furniture --\$21,444 p/yr for reference staff. --\$1,200 for furniture --NA

* State Guidelines for collection development compared to Chapel Hill's 1997-98 library collection:
 --Guideline minimum of 2 books per capita; Chapel Hill had 2.6 books per capita.
 --Guidelines do not identify a per capita minimum for the non-book collection; Chapel Hill had .1 non-book items (tapes, cds, periodicals, etc.) per capita.
 * State Guidelines for programming compared to Chapel Hill's 1997-98 library programming service:
 --Guidelines do not identify per capita minimums for library program. Chapel Hill had .35 programs per capita, or 56 programs.

**OPTION PATH I: TO MAINTAIN 1997-1998 LEVELS OF
LIBRARY SERVICES IN THE FACE OF A GROWING TOWN POPULATION**

ACTION REQUIRED TO MAINTAIN 1997-1998 LEVEL OF SERVICE		RESOURCE IMPLICATIONS	
PROGRAMMING (Continued)	STAFF	FACILITY	FUNDING
<ul style="list-style-type: none"> Support the Friends programs. Provide meeting space to community organizations. Encourage community groups to provide adult programs of general interest to the public at the library. 	--NA --Add .25 full-time Library Assistant II to support meeting programs (scheduling, set-up, equipment, etc.)	--NA --NA	Inflation/benefits/capital expenditures for space not included --NA --\$7,664 p/yr for staff support
Sub-total TECHNOLOGY *** <ul style="list-style-type: none"> Add 3 catalog terminals for the public, for a total of 26, to maintain .0005 catalog terminals per capita. Add 1 Internet station for total of 7 to maintain .0001 stations per capita. Add technology management ("system") support staff to address current inadequacy of support 	1.75 full-time staff --NA --NA --Add .25 full-time Librarian III.	250 square feet --Add 75 sq. ft. for 3 catalog terminals and 3 workstations. --Add 50 sq. ft. for 1 computer, 1 workstation and 2 chairs. --NA	\$39,830 operating; \$2,400 capital --\$ 900 for terminals. --\$1,200 for furniture. --\$6,000 for 3 Innovative ports. --\$ 720 p/yr (\$240x3) Innovative maintenance fee. --\$1,200 for computer. --\$1,150 for furniture. --\$11,400 p/yr for system support hours.
Sub-total MAINTAIN Totals	.25 full-time staff 4.25 full-time staff	125 square feet 1,803 square feet	\$12,120 operating; \$10,450 capital \$177,950 operating; \$17,850 capital

*** State Guidelines for technology compared to Chapel Hill's 1997-98 library technology:
 --Guidelines do not identify the number of catalog terminals per capita; Chapel Hill provided 23 public and 28 staff terminals.
 --Guideline minimum of 1 Internet workstation for every 2500 population (.0004 Internet stations per capita); Chapel Hill had 5 Internet workstations (.0001 stations per capita).
 --Guideline minimum of 1 printer for every 5 workstations; Chapel Hill had 2 printers to meet demand.
 --Guideline minimum of 1 full-time computer technician per 50 workstations; Chapel Hill provided 10% of one full-time employee.
 --Guidelines recommend providing a library website; brief library information was included on the Town's website.

OPTION PATH II: TO EXPAND 1997-1998 LEVELS OF LIBRARY SERVICES IN THE FACE OF A GROWING TOWN POPULATION

Population Assumption = 50,146
 Timeframe = From FY 2000 to FY 2005 (6-year horizon)

RESOURCE IMPLICATIONS			
ACTION REQUIRED TO EXPAND LEVEL OF SERVICE	STAFF	FACILITY	FUNDING
<p>MATERIALS/COLLECTIONS *</p> <ul style="list-style-type: none"> Add additional 18,640 bks. (.4 bks per capita) for a total collection of 150,438 by year 2005. Increases 97-98 bk. collection by 36,300 books or 3 bks. per capita. Increase non-English collection by 20%. Add additional 7,500 non-book items (.1 items per capita), i.e. tapes, cds, periodicals, etc, for a total collection of 10,000 by year 2005. Increases 97-98 non-book collection by 7500 items, or .2 items per capita. <p>Sub-total</p>	<p>2.25 full-time staff (See Option I) Plus...</p> <p>Prepare materials: Add .25 full-time Librarian I cataloger; .75 full-time Processing Technician. Shelve materials: Add 1 full-time shelver/page positions.</p>	<p>1,428 sq. ft. (See Option I). Plus...</p> <p>Shelving: Add 2,695 linear feet of shelving, or 65 double-sided shelves. Space: Shelving would require 1,422 sq. ft. currently not available in the library. 2 staff workstations would require 180 sq. ft.</p>	<p>Inflation/benefits/capital expenditures for space not included. \$126,000 operating; \$5,000 capital (See Option I). Plus...</p> <p>Would require an additional: --\$77,250 p/yr for books --\$15,000 p/yr for tapes, cds, periodicals, microforms, etc. --\$32,600 p/yr for staff --\$7,000 for all shelving --\$2,400 for two staff workstations</p>
<p>PROGRAMMING **</p> <p>In addition to programs and staff identified in Option I:</p> <ul style="list-style-type: none"> Increase children's staff support (from .00009 per capita to .00012 per capita) to: <ol style="list-style-type: none"> expand children's programs by 20%. expand target audience to include up to grade 12 coordinate after-school and/or off-site programs with schools and community organizations. add programs for families living in lower income housing. 	<p>4.25 full-time staff</p> <p>1.75 full-time staff (See Option I) Plus...</p> <p>--Add 2 full-time Children's Library Assistant III for implement expanded programming.</p>	<p>3,030 square feet</p> <p>250 sq. ft. (See Option I) Plus...</p> <p>--2 workstations and 180 sq. ft.</p>	<p>\$250,850 operating; \$14,400 capital</p> <p>\$39,830 operating; \$2,400 capital (See Option I) Plus...</p> <p>--\$42,880 p/yr for staff --\$2,400 for two staff work stations</p>

* State Guidelines for collection development compared to Chapel Hill's 1997-98 library collection:
 --Guideline minimum of 2 books per capita; Chapel Hill had 2.6 books per capita.
 ** Guidelines do not identify a per capita minimum for the non-book collection; Chapel Hill had .1 non-book items (tapes, cds, periodicals, etc.) per capita
 *** State Guidelines for programming compared to Chapel Hill's 1997-98 library programming service:

RESOURCE IMPLICATIONS			
ACTION REQUIRED TO EXPAND LEVEL OF SERVICE	STAFF	FACILITY	FUNDING
<p>PROGRAMMING (Continued)</p> <ul style="list-style-type: none"> • Begin to offer library-developed programs for adults: 1) market programs, emphasizing multi-cultural programs. 2) develop programs to attract non-users, especially minority groups in the community. 3) plan, coordinate, market and support adult programs, tours, etc. that reflect the interests of the community. EX: Black History Month; Best Books series; Web searching techniques. 4) develop cooperative programs with UNC, especially drama department, School of Library and Information Science, speakers bureau, etc. to enhance adult and children's programming. 	<p>--Add 1 full-time Public Services Librarian II to coordinate and market programs for adults.</p>	<p>--1 office, or 150 sq. ft. --Desk and two chairs --File cabinets --Computer/printer</p> <p>--500 sq. ft. additional meeting space</p>	<p>Inflation/benefits /capital expenditures for space not included</p> <p>--\$29,742 per year for staff --\$2,500 for furniture --\$1,500 for equipment</p>
<p>Sub-total</p>	<p>4.75 full-time staff</p>	<p>1,080 square feet</p>	<p>\$112,452 operating; \$8,800 capital</p>

RESOURCE IMPLICATIONS		
ACTION REQUIRED TO EXPAND LEVEL OF SERVICE	STAFF	FACILITY
TECHNOLOGY *		
<ul style="list-style-type: none"> • Add 13 public Internet workstations to meet minimum State guidelines of 20. (50,146/2500 = 20). • Add full time technology manager to: <ol style="list-style-type: none"> 1) coordinate issues associated with automation system, Internet stations, public access stations, telephone system, e-rate; 2) serve on Town Technology committees, etc. 3) implement Library home page. 4) pursue electronic resource sharing with UNC libraries. • Offer Internet skills classes to patrons and Town employees. • Provide Library catalog on the Web. 	<p>.25 full-time staff (See Option I) Plus...</p> <p>-- Add 2 full-time Reference Library Assistant IIs to assist patrons.</p> <p>--Add 1 full-time Public Services Librarian III</p> <p>--Add .25 full-time Reference Library Assistant III to train patrons and Town staff.</p> <p>--NA</p> <p>3.50 full-time staff</p>	<p>Inflation/benefits/capital expenditures for space not included.</p> <p>\$12,120 operating; \$10,450 capital (See Option I) Plus...</p> <p>--\$42,888 p/yr for staff. --\$15,500 for furniture. --\$13,000 for computers. --\$1,200 for printers.</p> <p>--\$32,791 for staff. --\$2,500 for furniture. --\$1,500 for equipment</p> <p>--\$5,375 p/yr for staff. --\$5,000 for equipment.</p> <p>--\$13,500 for vendor license. --\$1,350 per year vendor maintenance.</p> <p>\$94,524 operating; \$62,650 capital</p>
Sub-total	12.5 full-time staff	1,255 square feet
EXPAND total:	12.5 full-time staff	5,365 square feet

*** State Guidelines for technology compared to Chapel Hill's 1997-98 library technology:

--Guidelines do not identify the number of catalog terminals per capita; Chapel Hill provided 23 public and 28 staff terminals.

--Guideline minimum of 1 Internet workstation for every 2500 population (0000); Internet stations per capita; Chapel Hill had 5 Internet workstations (0001 stations per capita)

--Guideline minimum of 1 printer for every 5 workstations; Chapel Hill had 2 printers to meet demand

--Guideline minimum of 1 full-time computer technician per 50 workstations; Chapel Hill provided 10% of one full-time employee.

--Guidelines recommend providing a library website; brief library information was included on the Town's website.



MEMORANDUM

TO : The Mayor and Council

FROM : Fred Black, Library Board Chair
Chapel Hill Public Library

DATE : October 5, 1999

SUBJECT : Library Needs Assessment Task Force recommendations

First and foremost, we are very pleased that the Town Council initiated the Library Needs Assessment Task Force to consider the needs of our library in the years to come. We are also indebted to all of those who worked so hard to produce the useful and informative document.

At its August and September meetings, the Library Board reviewed the recent report of the Library Needs Assessment Task Force. Specifically, discussion included an examination of the goals associated with Option I (Maintain Services) and Option II (Expand Services) as presented in the report.

Key issues agreed to by the Library Board include the following:

1. Support for the Library Needs Assessment Task Force report's Option II, which identifies space, staff and costs needed to expand existing services.
2. Request that, because 46% of the Library's service is to patrons outside Chapel Hill, that the Town consider Orange County population projections as well as Chapel Hill population projection for 2005.
3. Request that both Orange County's and Chapel Hill's library budgets reflect increases associated with either maintaining (Option I) or expanding (Option II) library services as soon as possible. For Orange County, this request entails efforts to ensure that the percent of financial support to the Library (currently 13% of the total Library budget) be commensurate to the percent service (currently 46%) provided to residents who live in the county, but outside Chapel Hill.
4. Support for the Needs Assessment Task Force statement that additional space will be needed, whatever option path the Council should choose to pursue for the library.
5. Support for the Needs Assessment Task Force statement that the Town should hire a consultant to advise it on space and financial matters.

The Town's draft Comprehensive Plan includes a recommendation that the Town prepare a Master Plan for the Library. The Library Board also supports this recommendation, and urges the Town Council to hire a consultant to begin this work, based on the information included in the Library Needs Assessment Task Force report.

Thank you.