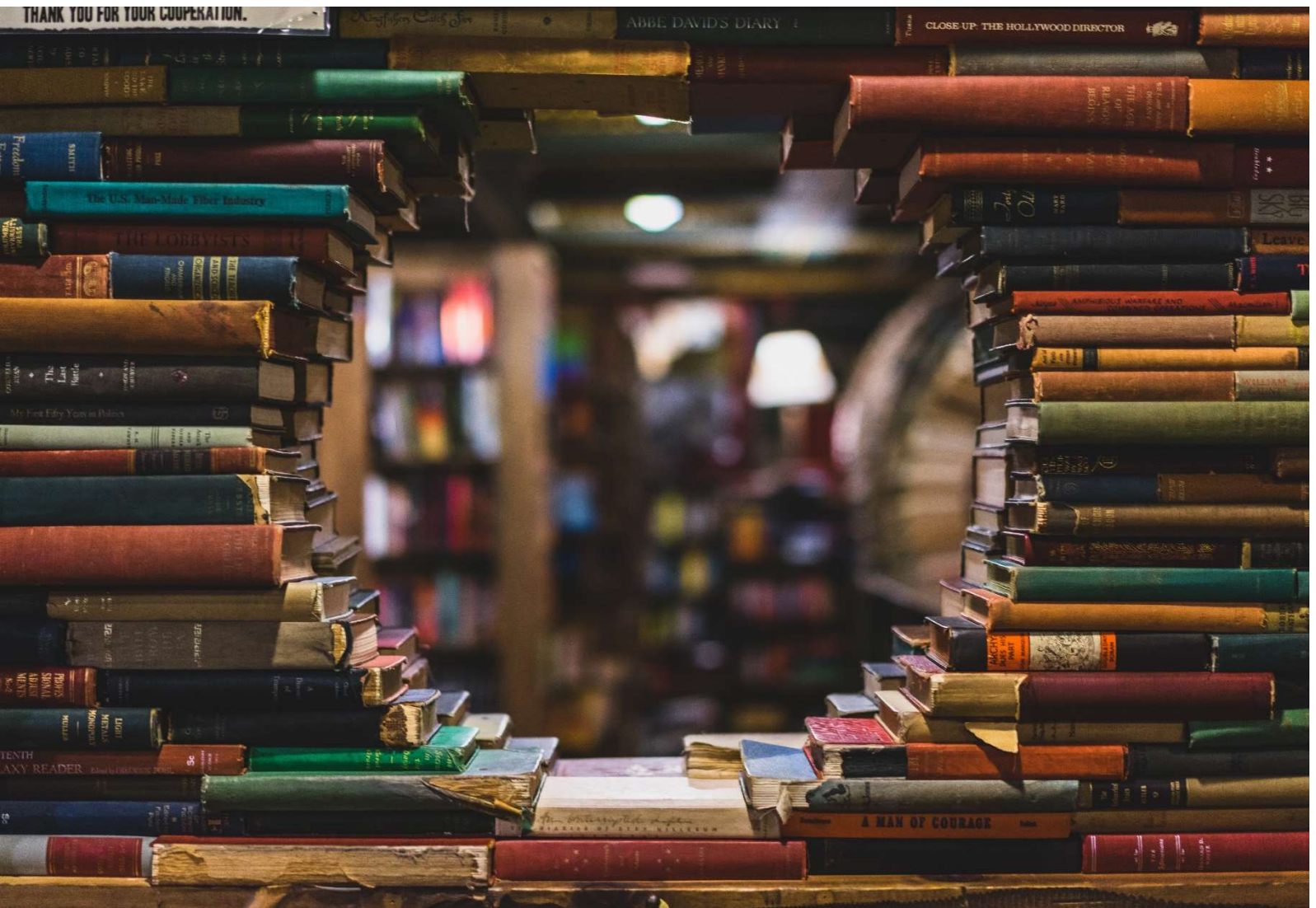


# Efficiency Study



Unification of the Palisades, Tappan and  
Orangeburg Library Districts  
into a Single District with Three Branches

HUDSON VALLEY **PATTERN** *for* **PROGRESS**

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# **EXECUTIVE SUMMARY**

Local libraries are crucial pillars of education, access to information, recreation, and community, making hamlets more attractive and thus underpinning property values and the tax base. Thus, the quality and financial sustainability of libraries is a critical community priority.

This is a study of the financial and service impacts of a proposed unification of the Tappan, Palisades and Orangeburg library districts into a single library district with three branches.

## **KEY CONCLUSION:**

**A unified district would reduce costs, improve services and help stabilize finances.**

## **KEY RECOMMENDATIONS:**

**Library trustees and the town board should begin the process of obtaining NYS authorization for a public vote to create a single district, elect trustees and approve its budget.**

**Alternatively, library trustees should consider plans for operating their libraries under reduced funding conditions, including reduced staff, hours and services.**

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It makes sense to explore the costs and benefits of a single district for three simple reasons with many aspects: stability of funding, quality of services and economies of scale.

A single district creates a wide range of opportunities to save money, enhance services, and preserve these vital community institutions for years to come. A single district library system needs one library Director, not three, one accountant, not three, one bookkeeping software license, not three, and fewer copier machines, to note just a few efficiencies. Coordinated purchase of new books and coordinated scheduling of programs can reduce duplication and broaden resources available to the community. Managing staff as one team serving three branch libraries preserves the familiar faces residents expect to see at “their” branch while flexibly responding to staff absences due to illness, vacation or off-site training.

### **Stability of Funding**

The value of a transparent, fair and consistent library funding mechanism is difficult to quantify, but is nonetheless an important benefit of unification. A unified library district budget would be approved through budget votes by district residents – the library users and taxpayers – when the unified library proposes an increase, not by annual contract negotiations with a town board concerned primarily with town government operations and policy. While still subject to the NYS Tax Cap, library budgets adopted via public vote tend to be more consistent from year to year. This change in funding process would bring the three libraries into alignment with the vast majority of library districts in Rockland and New York and make annual budgeting more predictable and long term planning more effective.

In summary, a unified district stabilizes funding:

- Greater financial stability and accountability through public budget approval votes
- Taxation of residents is more simple, fair and transparent
- Residents have direct approval of funding and representation through annual budget votes and election of trustees
- Greater private fundraising capacity with formation of “Friends” group for each branch

### Quality Of Services

The three libraries cluster in southern Orangetown and serve a combined population of an estimated 15,000 people. Palisades and Orangeburg libraries are each less than two miles, or a 5 minute drive, from Tappan Library, which lies in between. The three library organizations are essentially identical in structure and purpose and serve the same community – southern Orangetown. Many patrons already use the libraries as if they were a single district, thanks to their physical proximity and similarity of functions, and the fact that their catalogues are linked electronically through the Ramapo Catskill Library System. However, as separate entities, these libraries have limited ability to exploit economies of scale in purchasing, administration and staffing, and limited ability to coordinate services and programs for patrons.

In summary, a unified district improves quality of services:

- Continuity of services - each library becomes a “branch” of a single organization with improved services to the community; closure of buildings and layoffs are not under consideration
- Coordination of programming to eliminate duplication and competition, and improve access
- Coordinated purchasing of books and materials to reduce duplication and broaden collection
- Unified lending rules and shared lending of ebooks, online resources, and museum passes

### Economies of Scale

This study identifies the budget savings through operational efficiencies made possible by a single district operating the same facilities with the same staff as currently exist. The most immediate savings can be achieved by eliminating vacant administrative staff positions and combining the contract services the three libraries buy from outside vendors such as audit, RCLS, legal, insurance and maintenance. With further retirements in years to come, staff attrition will yield more savings. Branch closure and staff layoffs are not under consideration. Library trustees do not believe such actions are in the community’s interest.

In summary, a unified district provides economies of scale:

- Reduced staff costs through attrition – elimination of two Director positions at first, with opportunities to right-size staff in subsequent years through attrition; share staff among three branches as needed
- Administrative efficiency - merge duplicative budget, payroll, accounting, and technology systems for consistency and efficiency
- Better pricing on supplies, contractual services and technology through consolidated purchasing

This study includes the comparison of existing budgets to a model budget for a single district for the year 2020. Our analysis indicates that library district unification could result in a net initial expense reduction of as much as 6.8%, or about \$140,000 per year in operating costs, with greater expense reductions possible over subsequent years. Greater savings are possible over successive years as staff retirements and separations create opportunities to re-organize duties and as opportunities emerge to consolidate further contractual services and other costs. While these expense reductions will benefit district taxpayers for years to come, the model consolidated budget developed in this study is not a prediction of future tax levies, which will be impacted by factors beyond the scope of this study.

### **Loss of Autonomy**

Some of the concerns of unification include the possible loss of the separate identity of the current libraries, with changes in the programs and staff to which patrons have become accustomed. Libraries do lose autonomy of governance when they join a single district, and this must be a concern for trustees, patrons and taxpayers interested in preserving familiar facilities, staff and programs. However, as this study shows, a single district may actually support these goals better than current conditions of “independence” in which these small libraries must face common challenges separately, without the benefits of coordinated action.

# **INTRODUCTION**

The trustees of the Orangeburg, Tappan and Palisades Libraries, and the Town of Orangetown, jointly commissioned and funded this study to determine the costs and benefits of unifying these three libraries into a single district with three branches. This study shows that a unified district could save tax dollars while making the libraries more secure financially and more useful to town residents.

## **Study Scope**

This study is a collaboration of library directors and Hudson Valley Pattern for Progress, commissioned and overseen by the trustees of the three libraries and paid for equally by the libraries and the Town of Orangetown. The scope has been to identify and quantify budget savings and any new costs from creating a single district with merged personnel and operations.

The core of the study is the model budget, developed through extensive data collection and analysis. The model budget is not a proposed budget for 2022, the earliest possible year a single district could take effect. The model compares total current library spending to spending expected under a single district.

Staff layoffs and facility closure were specifically excluded from the scope to preserve the relations users have formed with the library staff and buildings.

The study involved the collection and analysis of data on library operations, including:

- ❖ Personnel data – titles, salaries, benefits, organizational charts, staff turnover rate. Consideration of potential labor efficiencies achievable under unified district.
- ❖ Budget data – revenue and expense histories for each library, vendor contracts for professional services, equipment, subscriptions; capital spending.
- ❖ Services data – review of physical facilities; analysis of data on catalogued collections, user activity, circulation of materials among the districts, and programming calendars.
- ❖ Governance and funding structures – review of options for creating a unified district that brings greater funding stability in order to preserve and enhance existing facilities. The working group reviewed current and proposed governance structures in light of the need for fair representation of all district taxpayers and library users within a unified district.
- ❖ Expert consultations – collection of insights and perspectives from other experienced library directors, library management researchers and similar case studies.

Since 2012, Blauvelt Library, the fourth free association library funded through annual town contracts, has been part of the redistricting discussions. These discussions included outside consultants, attorneys, the Town Supervisor and Town Council. The Blauvelt Library Board of Trustees voted not to participate in this study.

This report is not a legal analysis or a plan for implementation. However, in addition to budget efficiencies, this report provides contextual information useful for understanding why library district unification is of interest and how the district unification process might occur.

## Summary of Unification Impacts and Timeline

District unification would bring important changes to library governance, budget and administrative processes, while maintaining continuity of services from a library user’s perspective.

The three libraries are currently “Free Association Libraries” with tax districts established by state law, public elections of trustees, and funding through town contracts. The unified library district would be a “Special Legislative District Library” with a single tax district. Election of trustees and approval of budget would occur by public vote. The table below summarizes the effects of unification.

**Table 1: Summary of District Unification Impacts**

Activity	BEFORE: Three Separate Libraries	AFTER: Unified District
<b>Funding Sources</b>	Taxpayers of the library districts	No change
<b>Annual Budget Approval</b>	Town Board approves separate contract for each library and levies cost on that library's district	Residents of unified district vote on the library budget proposed by trustees
<b>Tax rate per \$1,000 in property value</b>	Different for taxpayers of each library district	Same for all taxpayers of unified district
<b>Tax Collection Method</b>	Library taxes collected by both town and school	Library taxes collected by town only
<b>Total expenses</b>	\$2.08 million	\$1.94 million
<b>Facilities</b>	Three sites	No change
<b>Governance</b>	25 Elected Trustees	7 Elected Trustees
<b>Management staff</b>	3 Library Directors	1 Library Director
<b>Staff</b>	20.16 FTEs, includes full-time and part-time	18.89 FTEs in Year 1; 16.64 FTEs in Year 5 through attrition
<b>Purchasing</b>	Duplicate costs for copiers, phones, databases, trash pickup, security alarms, phones, etc, etc.	Consolidated purchasing
<b>Materials Acquisition</b>	Duplicate purchases of books, etc.	Coordinated collection purchasing
<b>Services</b>	Certain services, such as museum passes, available only to local district residents	All services available to all residents of unified district
<b>Programs</b>	Duplicate and competing programs	Coordinated programming

In summary, unification would preserve the libraries as “branches” of a single organization, while enabling the consolidation of administrative functions and the coordination of services. The biggest change would be to governance, as the libraries would have one board of trustees and one director overseeing all staff and assets. Trustees are already elected by vote at annual meetings. With unification, residents would also elect library trustees and vote on any increases proposed in the library district budget, as occurs in most other library districts. This method of budget approval would replace the current system of three boards of trustees negotiating annual contracts with the Town of Orangetown’s council members during the town’s busy and politically fraught fall budget process. The library district would be directly subject to the NYS Tax Cap law, rather than indirectly via inclusion in the town budget.

There would be one library tax levy, making the funding process more transparent, predictable and accountable. The same taxpayers would fund the new unified district as have funded the three former districts, via the usual property tax assessment and collection process. Because there would be one budget instead of three, all district residents would be taxed at the same rate. Branch representation on the unified board of trustees would help ensure each branch’s needs are addressed in the annual budget process.

NYS law provides for various ways to govern and fund library districts. The libraries will need legal counsel to craft enabling legislation, work with NYS for review and approval, and if successful, combine assets under a single district. Library trustees, the Town Board, the state of New York and ultimately the voting public all have decisions to make that can either advance or stop the process. Below is a summary timeline of key steps in the process of forming a single library district based on trustees initiating a re-districting process starting in the Fall of 2019.<sup>1</sup>

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<sup>1</sup> The NYS Education Department, Division of Library Development, provides detailed information on this topic. See NYSED, “Creating public library districts,” <http://www.nysl.nysed.gov/libdev/libs/pldtools/guide/index.html>



Table 2: Timeline

ACTIVITY/QUARTER	2019			2020				2021
	Oct	Nov	Dec	Q1	Q2	Q3	Q4	Q1
Trustees of three libraries reach a consensus and decide to move ahead	X							
Town board presentation and vote to accept report and support new district			X					
Trustees determine specifics of unified district			X	X				
Bill drafted				X				
Town board vote on petition to NYS for authorization of public vote on new district				X				
Legislation introduced; NYS agency review					X			
Legislation passed by NYS assembly, senate, signed into law by Governor					X	X		
Community education and outreach		X	X	X	X	X		
Election held to create unified district, elect trustees and approve next year's budget						X		
Apply for NYS charter, dissolve old library districts, transfer all assets to new district							X	X
Unified library district becomes effective								X
Tax roll for new district established								X
First taxes collected for new district								X

It is common for library districts to operate multiple branches. In Rockland, the Haverstraw library has two locations, one in the village and one in Garnerville, and transitioned to a special district library with public budget votes in the late 1970s. Statewide, there are many multi-branch libraries, and several successful recent examples of the elimination of multiple districts in favor of a single district with several branch libraries:

- The Chemung County Library District resulted from a merger of two autonomous libraries; the Horseheads Free Library and the Steele Memorial Library in Elmira. The new district continues to operate both libraries and each facility has its own friends group and supporting foundation.
- The Northern Onondaga Library District involved a merger of three autonomous libraries; the Cicero Free Library, the Brewerton Free Library, and the North Syracuse Free Library. The three libraries remain open under a single administrative and governance structure.
- The Western Sullivan Public Library in Sullivan Count involved the merger of three public libraries; the Tusten-Cochecton Public Library, the Delaware Free Library, and the Jeffersonville Public Library. The three libraries now operate as separate branches under a single administrative and governance structure.<sup>2</sup>

Economies of scale and preservation of local identity are both very important. These principles are routinely accommodated, and even enhanced, through the elimination of multiple tax districts in favor of unified administration and funding of a single district with multiple branches.

<sup>2</sup> NYSED, "Consolidating and merging libraries," <http://www.nysl.nysed.gov/libdev/libr/pldtools/guide/consmrge.htm>

## ***EXISTING CONDITIONS AND RECENT HISTORY***

The three libraries are clustered in southern Orangetown and serve a combined population of an estimated 15,000 people. Palisades and Orangeburg libraries are each less than two miles, or a 5 minute drive, from Tappan Library, which lies in between. As small libraries, their organizations are functionally identical, even as their collections, architecture and programs have developed in unique ways.

All libraries in Orangetown are chartered and regulated by the NYS Department of Education, but these organizations take various forms. All are overseen by boards of trustees and are tax-exempt.

The four libraries serving central Orangetown and funded through town contracts – Tappan, Orangeburg, Palisades and Blauvelt – began operations as volunteer organizations in the late 1800s to mid 1900s. The libraries are very similar to each other in organizational and administrative structure, mission and services, but they differ in the size of their territories, levels of circulation and needs with regard to facilities improvement and maintenance. Each has its own unique history, architectural character and blend of holdings, programs and services, designed around the needs and interests of the community it serves. For example, Palisades Library is the smallest library in the county, Orangeburg Library occupies part of a town-owned building originally owned by the school district, and Tappan Library has recently expanded its facilities so it has a mortgage. Blauvelt Library is unique for having accumulated a large reserve fund, among other reasons.

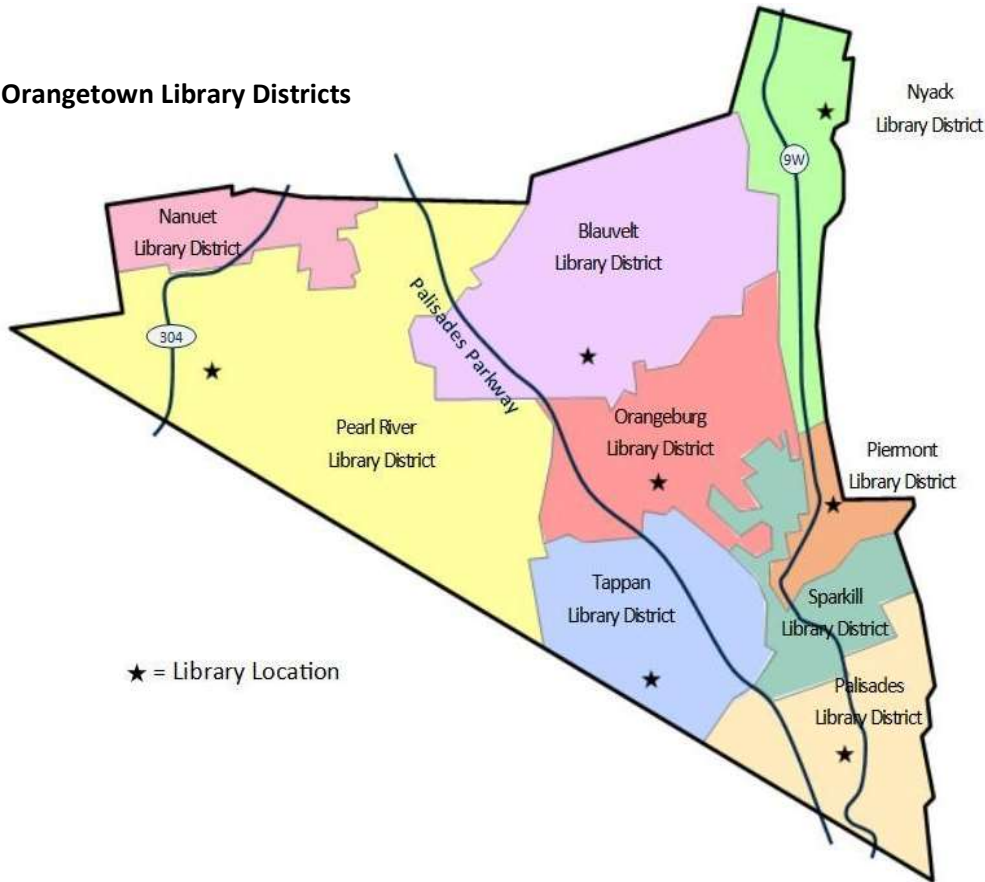
### **Library District Formed, Library Tax Levied on Town Property Tax Bill**

In 1962, growing town population resulted in the creation under NYS law of the Orangetown Library District. The creation of a public library district meant the Tappan, Palisades, Orangeburg and Blauvelt libraries would thereafter be funded primarily through a library tax paid by library district residents and collected by the town via the town property value assessment and tax collection process. Budgets would be set through annual contracts with the town board, in contrast to the budget votes by library districts residents that are the norm elsewhere in Orangetown, Rockland County and New York.

As the map below shows, the Orangetown Library District is actually composed of five sub-districts, with each hamlet library having its own service area and tax district. Sparkill residents may choose to obtain a library card from either Tappan, Palisades, Blauvelt or Orangeburg library. Sparkill property owners' town library taxes are allocated to the four free association libraries in amounts proportionate to the number of Sparkill residents with library cards in each district.

The four town-funded libraries together with Piermont Library cover most of the South Orangetown Central School District (Grandview is actually within the Nyack Library district). It is typical for library districts to follow school district boundaries, as is the case with the Pearl River, Nanuet and Nyack/Valley Cottage libraries.

**Map: Orangetown Library Districts**



### **2012 Home Rule Legislation Created Separate Budgets**

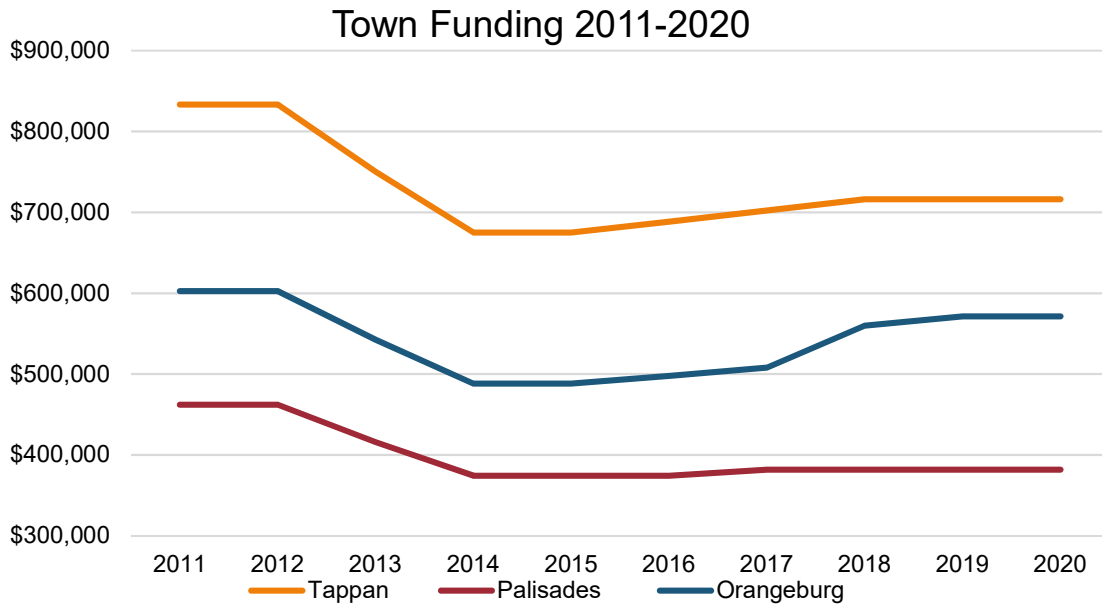
Prior to 2012, the four libraries existed as a type of tax district that required the Town to apply the same budget change, say a 3% increase in a given year, to all four libraries. In practice, this meant that the four libraries met to agree on a proposed budget change with the same percentage increase or decrease for each of the four. The Town then reviewed the proposal, determined how much to modify it, and applied the result to all four libraries, regardless of actual differences in library budget needs. This system resulted in substantial accumulations of reserve funds for some libraries, including the Blauvelt library.

In 2012, the Town and libraries successfully petitioned New York State, via Home Rule Legislation, for authorization to budget separately for the four libraries. This change enabled each library to propose a contract individually with the town board based on the library's specific needs, rather than lumping all the libraries together.<sup>3</sup> This change was long in the works and in principle enabled the town council to better address individual libraries' budget needs.

Despite the newly enacted 2012 legislation allowing the Town Board to finally assess each library budget request based on actual need, in 2013 and 2014 the Town Board voted to slash each library's budget equally by 10% for each of those years regardless of differences in library needs. Since then, the town council has ended to keep the library budgets flat at 0% or provide modest increases, depending on the case, such as Orangeburg's 10% increase in 2018.

<sup>3</sup> S06751 (2012) Creates the Orangetown public library district; modifies the boundaries; authorizes individual libraries to apply for appropriations on an individual basis. [https://nyassembly.gov/leg/?default\\_fld=&bn=S06751&term=2011&Summary=Y&Actions=Y&Text=Y&Votes=Y](https://nyassembly.gov/leg/?default_fld=&bn=S06751&term=2011&Summary=Y&Actions=Y&Text=Y&Votes=Y)

**Chart 1: Town Funding Trends**



Libraries were forced to draw down their reserve funds and to defer certain costs in order to maintain services. Reserve funds are necessary not only for emergency repairs and capital projects, but for cash flow between the end of the fiscal year in December and the town collection of library and town taxes in March. Libraries also need healthy reserves to qualify for grants from New York State for library improvements. Despite post-Recession economic austerity, the public voted in favor of an increase in the amount of library taxes collected by the South Orangetown Central School District. Funds collected through the school district remain a relatively small portion of overall library budgets.

### **School District Tax Levy Increased in 2017**

A library tax collected by the school district provides a small but critical portion of library operating funds to the five libraries serving the South Orangetown Central School District (Tappan, Palisades, Orangeburg, Blauvelt and Piermont libraries).

A 1990 referendum authorized the school district to collect \$225,000 per year in library taxes from all school district taxpayers to help fund the five libraries serving the school district, the three libraries in this study plus Blauvelt and Piermont libraries. The funds were split equally among the five libraries, or \$45,000 each, without regard to library size or need. In the absence of additional referenda, this funding level remained stagnant for over 25 years, despite increasing library costs due to inflation and population growth. Another referendum vote in 2017 boosted the total funds collected on behalf of the libraries to \$500,000 per year. The 2017 referendum also changed how school library tax funds are allocated among libraries. Funds are now allocated based on the size of the library's tax base.

In summary, improvements have occurred in how libraries are funded through the town and the school district. However, the libraries continued dependency on annual town contracts has not provided libraries with a predictable level of funding, due to the annual possibility of budget cuts or flat funding.

## Current Levels of Service

The table below provides a snapshot of 2018 available data to show important features of the three libraries in this study.<sup>4</sup> The table shows how much each of the libraries contributes to the total column.

**Table 3: Summary of Existing Conditions (2018)**

ACTIVITY	Orangeburg Library**	Palisades Library*	Tappan Library	Total
Population of the Legal Service Area	38%	7%	55%	12,008
Portion of district population served	38%	7%	55%	1
Library square footage	24%	24%	52%	18,429
Total # of cataloged books	42%	23%	35%	79,010
# of registered borrowers	35%	15%	50%	7,122
Visits	42%	15%	43%	118,425
Total circulation	48%	18%	33%	129,816
Total program attendance	44%	15%	41%	13,904
# of adult program sessions	42%	22%	37%	665
# of children's program sessions	45%	20%	36%	531
# of one on one program sessions	7%	78%	15%	220
# of young adult program sessions	46%	26%	28%	46
Total # reference transactions	54%	14%	32%	15,939
Local databases	30%	27%	42%	33
Total operating fund receipts	31%	25%	44%	\$1,954,257
Total # of staff FTEs	31%	21%	41%	21

Source: NYS Department of Education, Division of Library, Development, BiblioStat Connect, 2018 data

[www.nyssli.nysed.gov/libdev/libd/index.html#Find](http://www.nyssli.nysed.gov/libdev/libd/index.html#Find)

\*Palisades library district population is undercounted due to NYS error on district boundary with Tappan district.

\*\*Does not include Greenbush auditorium, regularly used by library for special programs

The three libraries clearly differ in size, measured in various ways, from population served to sizes of facilities and collections, circulation and frequency of program sessions. If the libraries create a unified district, a more detailed trend analysis of patterns of library use will aid in planning the purchase of new materials and scheduling of programs in order to leverage complementarities among the branches.

Each of the three libraries is dealing in its own way with the current trends of library operations:

- Libraries are lean, providing a wealth of services at low cost.
- The loaning of library books and other materials enables residents to avoid the costs of purchasing these resources, dramatically expanding access to costly resources.
- Circulation of physical resources such as books is flat or declining, whereas circulation of electronic books, films, data and other resources is increasing, along with the loan of nontraditional items.

<sup>4</sup> All libraries submit annual reports to the NYS Department of Education, Division of Library Development, quantifying a wide range of library activities and functions. Because library catalogues and lending activities are computerized, a great deal of data on library activities is available. As nonprofit organizations, libraries are particularly rich in data on their operations and library directors use this data to plan acquisitions and programs.

- Libraries provide program sessions targeting adults, youth and children, functioning as hubs of community, culture and education.
- Individual coaching in technology use and research methods is increasing as libraries automate or outsource routine back office clerical duties.
- Children, parents of children and seniors are particularly active library users.
- Students and adults increasingly use libraries as remote offices, as an alternative to working from home or commuting. Libraries are adding wifi, printing, computers, seating and other facilities to support this use.
- Technology is increasingly important, enabling remote access to library resources (websites and databases), automating library use (self-checkout), as a focus of value-added services (computer literacy, maker-spaces, etc.), and as a source of data-driven management.

### Overlapping District User Activity

A key trend in library use is the simple fact that people already treat the three libraries as a single district in the sense that they routinely visit all three libraries, not to mention use other libraries both near and far through the inter-library loan program. As shown in the table below, the typical library patron from south Orangetown uses the other two libraries for 17% of his or her transactions. This is a conservative figure, as program attendance is rarely tracked by library card. A nuanced review of library cross-over use according to patron age, days of the week, materials borrowed, and other variables, will aid in the coordination of collections, hours and programs by the three libraries in the event a single district is formed. For example, Tappan residents more frequently patronize the other two libraries (25% of their transactions are at Orangeburg and Palisades libraries), perhaps because it is located midway between them and has few parking spaces, yet Tappan is particularly popular among patrons in the 27-49 years age range, serving these people, and probably their children as well, from the other two districts.

**Table 4: Overlapping Library User Activity**

ACTIVITY	Tappan	Orangeburg	Palisades	Total
<b>Transactions by card holders at home library</b>	34,916	28,992	13,361	77,269
<b>Transactions by card holders at other two libraries</b>	11,780	1,644	2,261	15,685
<b>Total transactions by cardholders at home and at other two libraries</b>	46,696	30,636	15,622	92,954
<b>Portion of transactions card holders conduct at libraries other than their home library</b>	25%	5%	14%	<b>17%</b>

## **Dwindling Reserves, Deficit Spending and Service Reductions**

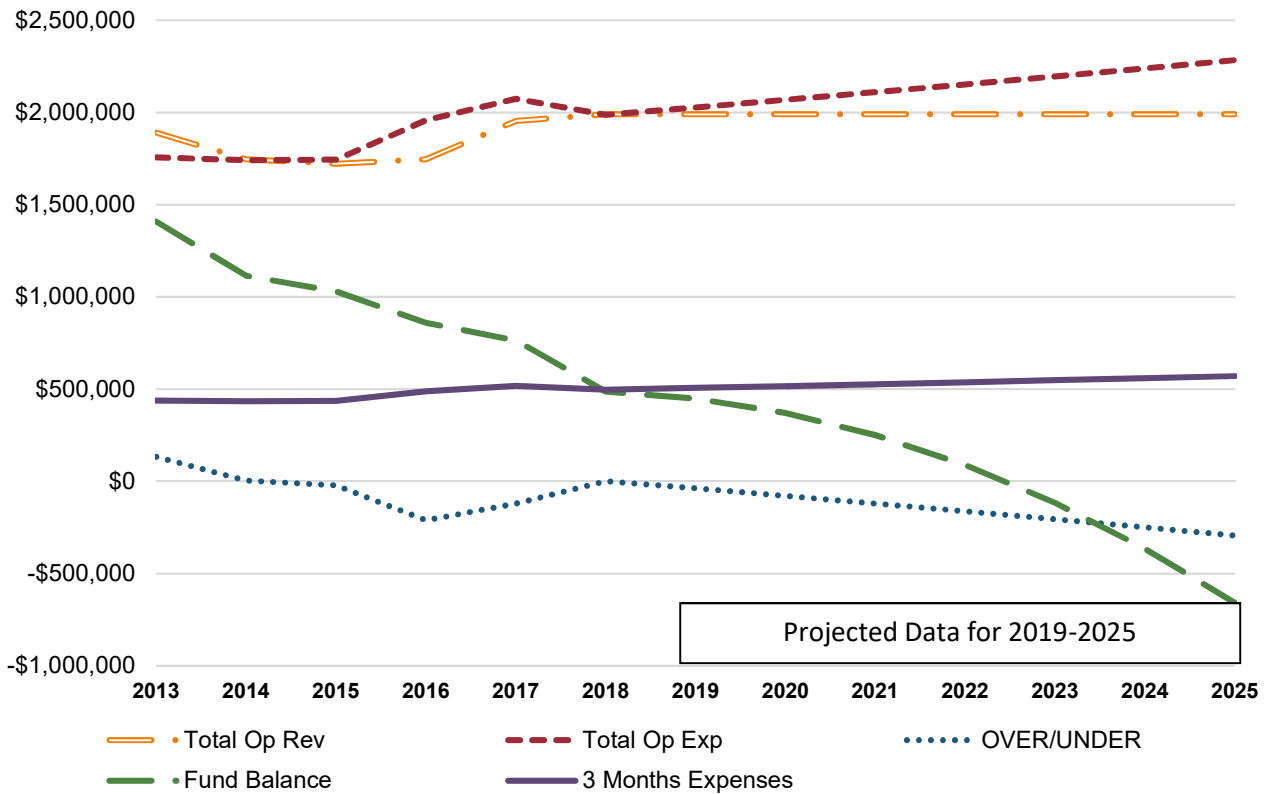
Under existing conditions, the three libraries show dwindling operating reserves due to budget austerity. Without a change, libraries will have to reduce levels of service and eliminate programs and force staff layoffs, and ultimately, risk losing their NYS accreditation and face closure of facilities.

Operating reserves are unrestricted funds set aside to fund capital improvement and stabilize a library's finances in the face of unexpected cash flow shortages, such as might be caused by building repairs, delayed payments, facilities damage due to severe storms or other economic conditions. NYS library construction grants require a library to have reserves equal to the full cost of the construction project in order to qualify for state funding. Libraries always need reserves to bridge between the end of the fiscal year and the arrival of tax revenues in March. Nonprofits commonly have an operating reserves standard of at least three months expenses in the case of organizations with predictable revenue streams, although every organization is different.

The chart below shows a scenario in which town funding remains flat, expenses increase at 2% (the approximate rate of inflation), and the libraries fail to reduce expenses aggressively. The chart reflects actual financial data from 2013 to 2018, and projected financials for subsequent years. The solid line represents a minimum reasonable operating reserve level of three months of a library's operating budget for staff, utilities, etc. This line does not show actual changes in reserves. The descending dashed line represents declining reserve funds in recent years and projected into the future.

In the absence of further action to reduce costs, and depending on a library's specific financial circumstances, the reserve funds will dwindle to less than recommended levels, imperiling library operations, and then in theory to zero over a few years. Tappan and Orangeburg libraries already manage with operating reserves below this recommended level, and Palisades will likely experience this reality in a few years. Absent changes to expenses or funding levels, such as recommended in this study, the south Orangetown libraries face insolvency and closure at some point in the not-too-distant future.

**Chart 2: Reserve Fund Decline Scenario Assuming Town Funding Flat and Expenses Increase with Inflation**



## ***THE BENEFITS OF DISTRICT UNIFICATION***

The opportunity to cut costs through consolidation of administrative staff and processes is a major benefit of library district unification and covered in detail below, along with implications for staffing, operations and services. The analysis begins with governance, however, because good governance is the backbone of an organization’s ability to provide the best services at the least cost, in the face of changing community needs, technologies and other conditions.

### **Governance: A Unified District Provides More Stable Funding and is More Accountable to Taxpayers and Users**

Currently, the town board reviews and approves library budgets, a process that is inefficient and burdensome to both the libraries and the town administration. There are several reasons why the town contract process is not well suited to library funding, in comparison to a public library vote, as would occur under a unified district.

First, the town board is poorly positioned to determine library budgets since, unlike town operations, the town board and its management staff have no oversight of how the funds are used and no role in coordinating services. Other contracts, such as those for ambulance, recycling or animal shelter services, involve routine coordination of the contract services with town operations. Library contracts, on the other hand, are a tiny



portion of town spending and only emerge as a town government concern once a year during a budget process that is hectic for all involved. Unfortunately for libraries, their town budget allocations are discretionary, unlike the vast majority of town spending that is virtually locked in year to year by labor contracts and NYS mandates. This also contributes to the town’s spending allocation under the NYS Tax Cap. For these reasons, town library spending is subject to circumstantial budgetary stresses unrelated to the needs of libraries or the desires of library district taxpayers relative to library services.

Second, the history of library funding in Orangetown via town contracts has been problematic. The inclusion of library budgets in the town budget process resulted, for many years, in exaggerated budgets for the libraries, partly because the town was prohibited legally from differentiating among the libraries in the budget process. Since 2012, when the town board slashed library budgets across the board, town contracts have required libraries to spend excessively from reserve funds. The uncertainty of town contract approval creates instability for library management and budget planning.

Third, the town contract process is less accountable to taxpayers than would be a single district funded through public budget votes. Direct votes on library budgets, in addition to the election of trustees, by the residents of the tax district are more likely to yield library budgets and policies reflective of the actual needs and desires of district tax payers. By contrast, town board members are elected at-large and thus may not live within, or pay taxes to, the south Orangetown library districts. As a single district, the libraries would face the same NYS Tax Cap limitations on spending currently faced by the town.

A single district would also be simpler and more fair to tax payers, eliminating the variations in library tax rates that currently exist among the library districts (see Table 5).

**Table 5: Variations in Residential Library Tax Rates per \$1000 in Assessed Value**

Library District	Town Tax	School Tax	Single District Tax
<i>Orangeburg</i>	1.7693	0.239442	1.96
<i>Palisades</i>	1.6655	0.239442	1.96
<i>Sparkill</i>	1.725	0.239442	1.96
<i>Tappan</i>	1.5761	0.239442	1.96

In light of the fact that library patrons routinely access library resources at libraries other than their “home” library (Table 4), it makes little sense for taxpayers of the different districts to pay different tax rates for essentially the same service.

Lastly, as discussed further below with regard to the coordination of library services, district unification solves the problem of library trustees proposing budgets that are essentially blind to the operations and investments planned by their neighboring libraries, libraries frequently used and relied upon by their own local library patrons. While informal coordination among libraries on services and programs is routine, there is no formal mechanism for shared decision making on such important matters as personnel, collections, capital projects or technology. Under a unified library district, the trustees could propose an annual budget in which the relationships among the three branch libraries are no longer incidental, but optimized in the interest of achieving the best user experience at each branch at the lowest overall cost.

The difficulties of funding libraries via town contract are not unique to Orangetown. The New York Library Association placed the funding of libraries through public votes at the top of its list of recommendations to the NYS Board of Regents and Education Department in its strategic plan for library service in New York.<sup>5</sup> Funding via public vote creates more stable and predictable funding and increased accountability directly to library district taxpayers.

### **Costs: A Unified District Saves an Estimated 6.8% in Expenses**

The governance structure of a unified library district provides for more cost-effective services to taxpayers than is possible under current conditions.

### **Comparing Separate vs Unified Budgets**

Library district unification creates opportunities to reduce operational expenses, as well as save labor time and enhance levels of service to the public. The table below shows the three libraries' budgets before and after unification based on 2020 budget plans. The model is a snapshot of the year 2020, comparing what it will cost to operate the three libraries separately in 2020, versus the cost to operate them as branches of a hypothetical single district. The table summarizes a line-by-line review of current expenses, from staff to insurance, supplies and subscriptions, that identified all feasible savings made possible by unification.

The model single district budget is intended as a comparison to existing conditions for the purposes of understanding the difference unification makes to the cost of operations. The model budget accounts for all known new operational costs from unification, offsetting expected savings. For example, annual budget votes for a single district would generate postage, printing and polling costs. Some possible new operational costs are too uncertain for inclusion. For example, if the Town vacates the Greenbush building as part of its eventual consolidation of the Building Department into a new town hall, Orangeburg Library may need to pay more of the costs of building maintenance.

The unification process also involves one-time costs for planning, legal work, and integration of accounting, payroll and other systems. Since these costs are unrelated to routine operations they are not included in the model.

The model 2020 budget is not to be mistaken for an estimate of a single district budget proposal in a future year, in the event a single district actually comes about through a public referendum. Such a future tax levy proposal would be affected by the passage of time, town board decisions on library funding in 2021, the further diminution of reserve funds, staff turnover and the decisions and judgments of a newly constituted board of trustees, among other factors.

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<sup>5</sup> Creating the Future: A 2020 Vision Plan for Library Service in New York State  
<http://www.nysl.nysed.gov/libdev/rac/2020final/index.html#speciallibraries>

**Table 6: Budget Impacts of District Unification**

	<i>Cumulative 3 District Budget</i>	<i>Model Single District Budget</i>	<i>Change (Unified-Cumulative)</i>
<b>INCOME</b>			
<b>Fundraising and Donations</b>	\$16,475	\$21,500	\$5,025
<b>Overdue Fines</b>	\$13,200		(\$13,200)
<b>Interest Income</b>	\$4,446	\$10,000	\$5,554
<b>NYS Aid to Libraries</b>	\$4,200	\$3,200	(\$1,000)
<b>School District Library Tax</b>	\$278,000	-	(\$278,000)
<b>Town of Orangetown Contract</b>	\$1,665,987	0	(\$1,665,987)
<b>Budget Vote</b>	0	\$1,896,268	\$1,896,268
<b>TOTAL INCOME</b>	<b>\$1,982,308</b>	<b>\$1,940,968</b>	<b>(\$41,340)</b>
<i>Note: Current 2020 cumulative budget plans require spending of approximately \$98,000 from reserves by Orangeburg and Palisades Libraries, causing a decline in end of year fund balance equal to that amount.</i>			
<b>EXPENSES</b>			
<b>Board of Trustee Expenses</b>	\$3,150	-	(\$3,150)
<b>Books, Videos, Ebooks</b>	\$192,697	\$164,000	(\$28,697)
<b>Program Adult/Teen/Child</b>	\$39,200	\$30,000	(\$9,200)
<b>Equipment Software</b>	\$18,500	\$8,500	(\$10,000)
<b>Operating Expenses</b>	\$296,275	\$272,900	(\$23,375)
<b>Professional Services</b>	\$75,950	\$52,400	(\$23,550)
<b>Salaries</b>	\$1,049,667	\$1,005,520	(\$44,147)
<b>Personnel Expenses</b>	\$286,965	\$324,648	\$37,683
<b>Miscellaneous Expenses</b>	\$11,625	\$6,000	(\$5,625)
<b>Capital Expenses</b>	\$107,650	\$77,000	(\$30,650)
<b>TOTAL EXPENSES</b>	<b>\$2,081,679</b>	<b>\$1,940,968</b>	<b>(\$140,711)</b>
<b>% SAVINGS EXPECTED</b>			<b>-6.80%</b>

A single district with three branches would cost an estimated 6.8% less to operate, a savings of over \$140,000. This is a conservative estimate. As stated earlier, these cost reductions will lighten the tax burden of district residents, but the 2020 model is not intended as a forecast of a future budget proposal and tax levy for a single district. Such a budget proposal will be affected by the passage of time, changes in reserve funds, future town funding decisions and other factors. This model includes some savings from consolidation of contractual services that may take more than a year to obtain, due to the complexity of some vendor relations and the need for current leases or agreements to expire. The economic benefits of library district unification would increase over time with staff attrition, the consolidation of contractual services and the adoption of more efficient workflows. The sections below provide a more detailed discussion of the most important anticipated savings from consolidation, those associated with staffing, professional services and other operating costs.

## ***STAFFING: A UNIFIED DISTRICT SAVES ON ADMINISTRATIVE STAFF COSTS***

District unification would enable elimination of duplicative administrative work and positions, resulting in an overall decrease in staff, both management and clerical. These changes create over \$44,000 in savings on salaries, even though standardization of wage levels across the three libraries increases expenses slightly and the elimination of positions is partially offset by the need to create new positions. The reduced salary costs are offset by increased expenses for personnel benefits (health insurance, retirement contributions, etc.). The net effect of these changes is that overall personnel costs (wages and benefits) are roughly the same before and after unification, but the organizational chart has shifted away from administrative and toward patron services and overall headcount is decreased.

It is important to note that decisions about salary, wages and benefits are made by library trustees and are not a part of civil service regulations. Civil service regulations are administered by the county personnel office and pertain to the establishment and definition of job titles, candidate qualifications and eligible candidates, not compensation.

The model 2020 budget reflects the elimination of currently vacant administrative positions – the Orangeburg Library Director and the Tappan Library Assistant Director. All other staff transfer over to the unified district. In the absence of a merger, this attrition plan is not possible and the vacant positions will be filled. The model budget also shows the addition of a full time HR/Principle Account Clerk position, necessary to transition the library administrative systems following the creation of a single district and provide administrative support on an on-going basis.

Personnel related costs for health and retirement benefits change with district unification. All three libraries currently use the NYS Health Insurance Program (NYSHIP) and Orangeburg Library employees are in the NYS retirement system. The model budget assumes those single district employees who would be covered by health insurance would pay 20% of the cost of individual policies and 65% of the cost of family policies. Unification entails the migration of Tappan and Palisades Library employees who qualify into the NYS retirement system at a somewhat increased cost per covered employee. This cost would be partially offset by the elimination of the existing 401k and 403b program and associated employer contributions and

administrative fees 90% of employees would enter the retirement system as Tier 6 employees who are required to make larger contributions toward funding the system than employees in previous tiers. Overall, non-salary personnel costs increase slightly with unification.

It is worth pointing out that improved benefits and a unified organizational chart bring other important benefits that are not easily quantified. First, the modestly increased value of job benefits would help the new library district attract and retain talented employees. Staff attraction and retention is a significant challenge for the libraries, since the profile of a typical new employee includes early career aspiring librarians likely to seek higher paying jobs, and mid-career local residents for whom part-time work complements family responsibilities that change over time. Combined with very low unemployment, these factors result in staff turnover and a limited pool of candidates to fill open positions. Second, there would be greater opportunity for professional development and career mobility within a unified library district, and thus a greater incentive for prospective employees to join the team in the first place. A slightly enhanced benefits regime also helps restrain salary growth.

The overall impact of these personnel changes is a net reduction in staffing, or FTEs (Full Time Equivalents) as retirements or separations occur and the new organizational chart evolves. The three libraries are currently budgeted for a combined total of 20.16 FTEs. This includes thirteen full-time staff and twenty-four part-time staff who work from one to 24 hours per week. The part-time staff account for 7.16 FTEs. The table below shows the staff changes proposed by the model budget.

**Table 7: Estimated Staff Reduction Following Creation of a Single District**

Timeframe	Total FTEs	Attrition/Addition
<b>Current</b>	20.16	
<b>Single District Model, Year 1</b>	19.16	Eliminate full-time Director & Assistant Director (2 FTEs); Add FT HR/Principle Account Clerk
<b>Single District Model, Year 1</b>	18.89	Add FT Librarian; Reduce hours of various clerical positions.
<b>Single District Model, Year 5</b>	16.64	Reduce clerical positions (2.25 FTEs)
<b>Total FTE Attrition, Years 1-5</b>	3.52	

Staff turnover in recent years at the three libraries combined has been about five employees per year. This natural turnover creates further opportunities for attrition and adjustment of personnel. Attrition of an additional 2.25 FTEs can be expected over the course of several years, for a savings of about \$108,000 in salary and benefits. Together with the elimination of administrative positions currently held vacant and creation of new part-and full-time positions proposed above, this attrition would likely bring total FTEs for all three libraries down to 16.64, or a 17% reduction in personnel.

The table below shows one way in which staffing of a unified library with three branches could work. Most positions would routinely report to a single library branch, while others would “float” depending on needs due to staff illness, vacations, program schedules and other factors.

**Table 8: Organization of Single District**

Multi-Site Staff	Notes
Director II	Senior management staff will work as a team to administer all three branches of the single district, locating their offices as needed.
Assistant Director II	
HR/Principle Account Clerk	
Program Coordinator	Unified event calendars, meeting room reservations, website and newsletter publicity.
Librarian I (substitute)	Substitute librarians and some other part-time staff will be assigned to branch libraries as needed.
Library Clerk I (substitute)	
Library Aide/Assistant	
Site-Based Staff (Flexible)	Notes
Librarian III (Youth)	These staff will spend most of their time in a single branch, but provide specialized support to other branches as needed.
Librarian III (Tech/Adult)	
Librarian III (Adult)	
Site-Based Staff	Notes
Librarian I	These staff will always work in the same branch.
Library Clerk I (Circulation Manager)	
Library Clerk	
Library Page	

Given the randomness of retirements and separations, the library leadership will need to continuously evaluate the needs of the three branches and the human resources available. Minimum safe staffing of two employees on duty at all times seems reasonable, with more staff for busier times of the day and week. Future issues for consideration in staffing are discussed further below.

## Operating Expenses, Professional Services and Other Purchasing Costs: A Unified District Saves on Many Non-Staff Costs

Unification brings opportunities to save money across almost every type of library purchasing activity, from supplies and equipment to professional services, subscriptions to periodicals and databases and myriad other costs. The libraries already use the Ramapo Catskill Library System (RCLS) to offer patrons a unified catalogue of materials for loan and obtain certain IT services. District unification pushes the logic of shared administration, resources and technology into other commonsense areas. In many cases, savings opportunities are tied to reorganization of workflows within a unified district.

Below is a partial list of staff activities that currently occur at all three branches, but make sense to consolidate into the job descriptions of fewer employees, to conduct from a single location, or to streamline in other ways.

- **Governance** – one board of trustees, not three, enables labor time savings for library staff, and former trustees to focus on fundraising and other library district supporting activities via formation of a nonprofit “Friends” group.
- **Administration** – one Director, not three, reduces overhead costs and integrates management of three branches within one district.
- **New materials selection and processing and “weeding” of outdated materials to free up shelf space** – these are labor intensive activities that can be coordinated and conducted among branches to make them more efficient.
- **Bookkeeping, HR, personnel administration** – one staff person, not three; one budget; one payroll processing service, elimination of duplicative systems.
- **Purchasing and procurement** – consolidation of vendors for everything from elevator maintenance and inspection to database and museum pass subscriptions.
- **Program planning, scheduling and contracting** – one staff person coordinates calendar, contracts with vendors, schedules facilities, promotes programs to media and community, reserves meeting rooms at all three branches for public use, etc.
- **IT and website maintenance** – one website, one staff person in charge, one host service, enabling savings of both labor time and purchasing of services, as well as easier public access to information.
- **Newsletter production** – one staff person coordinates and designs one newsletter so public can easily see resources and programs at all three library branches.
- **Supplies storage and distribution** – one storage area serves three branches.
- **Volunteer recruitment, training and oversight** – single volunteer recruitment campaign for all branches, facilitated by creation of nonprofit “Friends” group engaging “alumni” of the library boards of trustees as core participants.
- **Fundraising activities** – one employee in charge of grantwriting for all branches.

The above changes in workflow enable savings across the wide range of non-personnel related expenses libraries incur in the course of normal operations. The summary budget above indicates likely savings in the following categories of spending:

EXPENSES	
Board of Trustee Expenses	(\$3,150)
Books, Videos, Ebooks	(\$28,697)
Program Adult/Teen/Child	(\$9,200)
Equipment Software	(\$10,000)
Operating Expenses	(\$23,375)
Professional Services	(\$23,550)
Miscellaneous Expenses	(\$5,625)

### Professional and contractual Services

The list below provides a more detailed view of professional services and operating expenses that all three libraries obtain from diverse vendors. In many cases, a unified district may reduce overall costs of contractual services, and reduce staff time necessary to manage these contracts and vendors, by consolidating services to a single vendor. A phased approach may be necessary as transitioning to consolidated vendors may take several years. As seen in the budget table above, the initial phase of consolidation of these purchases would yield significant savings.

- Annual audit
- IT support
- Computer maintenance services from RCLS
- Elevator maintenance and inspection
- Fire alarm maintenance and inspection
- HVAC system monitoring and maintenance
- Website hosting
- Printing of newsletters
- Copier leases
- Software licenses
- Custodial services
- Landscaping
- Snowplowing
- Payroll processing
- Pension administration
- Supplies (paper, etc.)
- Insurance
- Telephone service
- Professional memberships, and training
- Subscriptions to magazines, newspapers, online databases, museum passes, etc.
- Program vendors (adult and children programs)

### Operating and Equipment Expenses

Savings in operating expenses include savings through consolidation on the fees paid Ramapo Catskill Library System, which provides diverse catalogue, IT and delivery services to member libraries. Library staff will provide more IT services. Other sources of savings include insurance, snow removal, postage and payroll processing costs. Consolidation also enables elimination of duplicative software licensing fees and certain equipment, such as extra copier machines.



### Videos, Books, E-books and Databases

Total expenses for books, videos, magazines and other materials would be reduced through the elimination of excessive duplication of purchasing, the more rapid sharing of new materials among three library branches, and a general right-sizing of new materials purchasing in proportion to levels of circulation. There is a trend in library use toward electronic resources, such as databases for ancestry and other forms of research and E-books, though traditional books remain a valuable investment.

### Fundraising

Private funds have not been a big portion of library budgets, but growth in private donations is one opportunity a unified library district should not miss. Libraries currently obtain private funds through direct mail appeals, special projects and memorial bequeathments, among other sources. Libraries occasionally obtain grants, often for capital improvements, such as a wheelchair ramp or elevator. Grant revenues are too uncertain for inclusion in the model budget, but a unified library district would be more likely to succeed in winning grants due to greater staff capacity to write and administer grants and a greater service area that would benefit from donated funds. The formation of a nonprofit “Friends” group and the involvement of trustees and former trustees would aid immeasurably in this effort.

### Quality of Services: A Unified District Enables Coordination Among Branches to Offer Patrons Better Service

The coordination of services among branches made possible by a single district would make the libraries more accessible and useful to district residents, in addition to creating the myriad opportunities to save money identified in this study.

- **Communications** – combining all branch calendars, program schedules and other information into a single website and single newsletter would make it much easier for patrons to know where and when to go to obtain desired services.
- **Meeting room reservations** – a centralized administration means community groups can identify an open meeting room at any of the three libraries and schedule its use with one phone call or online registration.
- **Priority access to high demand items** – libraries currently favor local residents with early registration for programs and priority access to books and other items for loan. With a single district, if there is a popular program at Tappan Library, for example, the Tappan branch would prioritize access of not only Tappan residents, as currently occurs, but of Palisades and Orangeburg residents, before allowing registrations by people from other districts. The same principle would apply to in-demand books and other items for loan. If a popular item is on loan from the Orangeburg Library to the Suffern Library, for example, and has been requested by both a Palisades resident and a New City resident, the Palisades resident will receive the item first.
- **Staffing** – the ability to assign staff to branches based on need would make it easier for branches to cover vacancies due to illness or vacation, and to obtain staff with specialized skills when necessary, by drawing on the staff of other branches. More efficient division of labor for back office duties, such as new material processing into the catalogue, means more staff time can be dedicated to helping patrons.

- **Open hours** – branches can coordinate their hours to boost resident access at marginal times, such as weekend mornings and evenings.
- **Specialized materials** – collections at branches inevitably overlap, but can also complement each other. For example, one branch may have a deeper collection of cookbooks while another allocates extra shelf space to science fiction. Analysis of data on circulation of materials, such as knowing what age group is borrowing what type of material from which library, can inform decisions about what books to buy and which branch to put them in, as well as decisions about programs to schedule.
- **Facilities use** – Orangeburg Library has a large meeting room and Tappan has a space for hands-on programming, while Palisades offers quiet reading and work space. A single district can maximize the use of these strengths in planning programs, collections and communications.
- **Policies** – Making consistent policies among branches for overdue fines, meeting room reservation, loan of high-demand books and other materials would make the libraries more user-friendly and save on staff time needed to explain to patrons the rules and their small variations among branches.

## ***ISSUES FOR CONSIDERATION***

The following issues will need to be considered if the consolidation goes forward. Preliminary recommendations are offered for consideration by the current library districts and the governing structure of any new library district that is created.

### **Governance Issues**

**COMMUNITY REPRESENTATION ON NEW LIBRARY BOARD:** Representation of the three branches and their respective communities on the board of trustees is very important. Enabling NYS legislation for the unified district should require two representatives each from Tappan, Orangeburg and Palisades, and one from Sparkill. This will insure that the new board membership includes people likely to be familiar with the branches and the users they serve.

**ROTATE BOARD MEETINGS AMONG BRANCHES:** Consider holding board meetings in all branches on a rotating basis to promote trustee awareness and public access to trustee meetings.

**CLARIFY MATTER OF LIBRARY BRANCH CLOSURE:** As it is the clear intent of the current trustees to keep all three branches open following unification, this principle should appear in the foundational documents of the new district (enabling legislation, charter, bylaws, etc.). Any future branch closure proposal must require due diligence and a public vote.

### **Expense Reduction Issues**

**CREATE A FRIENDS GROUP:** Establish a separate 501c3 Friends group to volunteer and to raise private funds for special exhibits, new technology and programs. Consider incorporating a single Friends group, but maintaining branch-based sub-committees to leverage user loyalty to specific branches. Trustees should designate a liaison on their board to the Friends group, participate in Friends volunteer and fundraising activities, and rotate off the board of trustees into the Friends group, and vice versa.

**CHANGE OVERDUE FINE SCHEDULE:** The model budget assumes the elimination of most overdue fines, especially those for low-demand materials and youth library patrons, in line with trends in the library sector. This is a policy issue to be reviewed by the new board of trustees, which may also consider strengthening fines for high-demand materials and making all rules consistent across all library branches.

**ADOPT AN INVESTMENT POLICY:** The unified library should adopt an investment policy, including purchase of CDs, to obtain the best interest income on funds.

**ADOPT A RESERVE FUND POLICY:** Trustees should create a reserve fund policy that establishes the purpose of unreserved funds and the goal of maintaining an amount of unreserved funds as a percentage of the overall budget.

**RIGHT-SIZE MATERIALS ACQUISITION BUDGETS AND CENTRALIZE NEW MATERIALS SELECTION:** Compare new materials purchasing at similar sized libraries to establish a reasonable expectation. Adopt policies and procedures to limit the immediate loss of newly purchased high-demand materials to other library districts via interlibrary loan. Assign oversight of new material selection, ordering and processing into the catalogue and collection to a single staff person operating out of either Orangeburg or Tappan libraries that have more back office space than Palisades.

**CENTRALIZE PUBLIC PROGRAM PLANNING:** Assign program selection and planning to a single library staff person to work in collaboration with librarians and trustees to identify programs, choose vendors, schedule and promote events.

**HIRE PART-TIME IT AND CUSTODIAL STAFF:** Trustees may consider eliminating contractual IT and custodial services in favor of part-time staff solutions, and including basic lawn-mowing in the custodial service, instead of hiring a landscaper. Bringing these contracts “in-house” may increase productivity.

**PHASE IN CONSOLIDATION OF ALL CONTRACTUAL SERVICES AND PURCHASING AS APPROPRIATE:** Develop a phased-in plan for consolidation of contractual services over three years as contracts expire and the unified library identifies further opportunities to standardize administrative and support functions. It is beyond the scope of this study to engage with vendors to renegotiate contracts to identify precise savings calculations. Trustees and staff should conduct a thorough review of purchasing activity, aligning it where possible between the three library branches. Consider contracting with an expense reduction expert to work on contingency to obtain reduced costs while maintaining levels of service.

**REQUIRE REASONABLE EMPLOYEE CONTRIBUTIONS TO HEALTH AND RETIREMENT PLANS:** Employee contributions of 20% for individual health insurance and 65% for family health insurance are built into the model budget. Trustees will also need to create a uniform salary schedule across all job titles, controlling salary growth in recognition of improved benefits being offered.

**CONTINUOUS ATTRITION MANAGEMENT:** Leadership of a unified library district should develop a staff attrition plan to eliminate duplicate or unnecessary positions over a three year period as staff retire or voluntarily separate, and to boost staffing where needed with changes in community needs and technology.

**DEBT SERVICE SCHEDULE:** The model assumes a debt repayment schedule for Tappan Library that costs \$77,000 per year. Trustees may lower this annual payment to the minimum required, or raise it to pay off the mortgage more quickly. A new board of trustees would need to choose a repayment schedule that meets both short term and long term financial goals, based on analysis of unreserved funds among other factors, and include any change in future budget proposals for public vote.

## Staffing and Service Coordination Issues

**LOCATION OF ADMINISTRATIVE TEAM IN BRANCHES:** The new trustees of a single district will need to work with library directors to insure the library administrators are both physically present in all branches and able to efficiently communicate with each other face to face as needed. This raises the question of whether or not to co-locate administrator workstations in a single branch for ease of communication, or spread these workstations across the branches for ease of branch supervision while maintaining a regular schedule of team meetings to insure continuity communications. At a minimum, the following positions should be considered as serving equally all three branches:

- Library Director II
- Assistant Director II
- Program Coordinator
- Information Specialist (IT)
- Human Resources /Principle Account Clerk

The decision whether to co-locate or not is partly a question of available office space, as well as efficient workflow and physical supervision of the operations of three branches. Because the branches are so close together, the trustees and administrators may experiment with various approaches to administrative workstation location and workflow organization to find the best balance.

**CONCENTRATE PROCESSING OF NEW MATERIALS IN ONE BRANCH:** New materials do not arrive in the library catalogue by themselves. Labor is required to select, order, receive, prepare and catalogue new books, DVDs and other resources. Upon unification, the trustees may shift the balance of this work between contractual services and in-house staff. The libraries currently vary in which elements of the processing of new materials they handle in-house vs via contractual service. The work of processing new materials should be concentrated in one branch to eliminate duplicate uses of valuable office space and equipment. Once ready to be shelved, the materials can be shelved in whichever of the three branches is appropriate, given existing collections, space, demand and other considerations. The same logic applies to “weeding” or removal of catalogued materials.

**LIBRARY HOURS:** The libraries are currently open a total of 52-56 hours per week each with very similar schedules. Small adjustments can make a big difference in accessibility. For example, a unified district may consider expanding morning hours for one branch to open at 9am on weekdays. One library could be open on Sunday evenings for students preparing for the coming school week.

**CONTINUOUS IMPROVEMENT:** The setting of expectations for high standards of efficiency and productivity, monitoring these standards, and incorporating them into staff performance review, is necessary. Library leadership will need to manage closely how staff spend their time when balancing between responding to patrons and completing routine housekeeping tasks. Shifts may be necessary in the balance of material check-in, sorting and shelving vs customer service time for various positions in order to boost time spent helping people.