Creating the Future of the Library

Charlotte Mecklenburg Library and the Future of the Library Task Force

Urban Libraries Council
September 18, 2012
Charlotte Mecklenburg Library:
David Singleton, Director of Libraries
Cordelia Anderson, Director of Marketing & Communications
Sean Hogue, Consultant, Vertere Capital Advisors

Future of the Library Task Force:
Gloria Kelley, Library Trustee
and former member of the Future of the Library Task Force

Mecklenburg County:
Leslie Johnson, Associate General Manager
The Great Recession

World Crisis
• December 2007 - global market decline began

United States
• Week of October 8, 2007, DJIA hits 14,293
• Week of March 9, 2009, DJIA drops to 6,627
History of Library Funding from Mecklenburg County
Fiscal Year 2004 to 2013
What did the 2010 funding cut represent?

• 32% reduction in funding from previous fiscal year
• 50% reduction of library hours
• Closure of 4 branches
• Lay-offs of over 180 staff
Stabilization Plan – FY2010-11

• Mecklenburg’s citizens respond

• City of Charlotte and small towns join in

• Future of the Library Task Force formed
• THE TASK FORCE PROCESS
Future of the Library Task Force

• Charge identified by *Design Team*:
  – Scope, cost, and importance of services
  – System for delivering services
  – Organizational structure and governance
  – Funding model

• 17 members, citizen-led, appointed in October

• Met October 2010 – March 2011

• Presented Final report to Mecklenburg County Commissioners, Library Board of Trustees & public
Misconceptions Identified by the Task Force Design Team:

• The Library is stable in its current form.
• There is a quick fix.
• Philanthropy fills the government funding gap.
• There are funding replacement alternatives.
• Outsourcing alone will fill the funding gap.
• Volunteers can fill staffing needs in the long term.
Misconceptions (cont)

Task Force concluded that, compared to 55 peer libraries:

• Charlotte Mecklenburg Library was not overfunded, nor was it underfunded, prior to the budget reductions.

• Charlotte Mecklenburg Library was not overbuilt, nor was it underbuilt, prior to the budget reductions.
A New Beginning

Task Force Recommendations:

39 total including:

– Development
– Programming
– Organizational Management
– Funding Partnership with Mecklenburg County
Organizational Change

• Public discussion not always comfortable
• Challenged assumptions
• Allowed us to re-think many services
• Resulted in more focused organization
• IMPLEMENTING THE RECOMMENDATIONS
Three Strategies for Operational Success

- Sharpening focus of services/programs
- Building organizational capacity
- Increasing library revenues
Strengthening Focus

• Addressing *mission creep*
  – What are the most critical services?
  – How can we provide services differently?
  – What can we stop doing?

• Enhanced *community partnerships & collaborations*
Building Organizational Capacity

- *Unified Services* – conduct any library service at any service point
- *WorkSmart* - improve workflow for efficiency & effectiveness
- *Volunteers* – updated duties & job descriptions to extend and support the work of staff
Increasing Revenues

• Fines & fees restructuring
• Community fundraising
  – Targeted efforts most effective
• Friends of the Library
Library/County Partnership

• Library service is result of a partnership
  – Library is the *managing partner*: delivers services
  – County is the *funding partner*: provides funding

• When issues arise made that significantly impact delivery and cost of service, both partners need to be consulted
Old Library/County Partnership

**Library**
- Manage budget
- Deliver services
- Report on performance
- Manage capital projects
- Open/close branches

**County**
- Provide funding, budget oversight
- Measure performance
- Approve capital funding
- Appoint board members
New Library/County Partnership

Library
Managing partner: operations, services, general/ administrative

County
Funding partner: budget, funding, appointment of trustees
New Library/County Partnership

**Library**
Managing partner: operations, services, general/ administrative

**County**
Funding partner: budget, funding, appointment of trustees

**Shared activities:**
- Expansion/footprint
- Capital projects
- Material changes in service
- Reporting on performance
- Significant changes in compensation/benefits
- Branch closings
Implementing Task Force Recommendations in FY2012

• *Programming Plan* – focused programming, identification of actual cost of program delivery, delivering both outputs and outcomes

• *Development Plan* – setting a fundraising goal, establishing a Foundation
Implementing Task Force Recommendations in FY2012 (cont)

• *Organizational Management* – consolidation of duplicative functions with our funding partner (HR, IT, Maintenance, Security)

• Recognizing *Funding Partnership* with our largest funder, Mecklenburg County
• TELLING OUR STORY
The Power of Data

- Data driven decisions essential
- Fully costing services
- Choices/impacts
- Remove decisions from emotional
- Moving from outputs to outcomes
Dashboard

2011 Budget (Deficit)/Surplus

Location Count

Job Reductions

Beatties Ford
Belmont
Carmel
Checkit
Cornellus
Davidson
Freedom
Hickory Grove
Imagination
Independ
Main
Matthews
Mint Hill
Morrison
Mt. Island
Myers Park
N. County
Plaza Midwood
Scaleybark
S. County
Steele Creek
Sugar Creek
University
West Blvd
Model Inputs

Input Changes

**Revenue**

- Meck County: 100.00%
  - County Adj: 10.00%
  - ABC: 100.00%
  - State: 100.00%
  - Federal: 100.00%

**Consolidation**

- Maintenance Bldg: 100.00%
  - Maintenance: 100.00%
  - Security: 100.00%
  - H/R: 100.00%

**Salaries**

- >$100k: 100.00%
- $50-100: 100.00%
- <$50k: 100.00%

**Open/Close Status**

<table>
<thead>
<tr>
<th>Location</th>
<th>Open/Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beatties Ford</td>
<td>1</td>
</tr>
<tr>
<td>Belmont</td>
<td>1</td>
</tr>
<tr>
<td>Carmel</td>
<td>1</td>
</tr>
<tr>
<td>Checkit Outlet</td>
<td>1</td>
</tr>
<tr>
<td>Cornelius</td>
<td>1</td>
</tr>
<tr>
<td>Davidson</td>
<td>1</td>
</tr>
<tr>
<td>Freedom</td>
<td>1</td>
</tr>
<tr>
<td>Hickory Grove</td>
<td>1</td>
</tr>
<tr>
<td>Imaginary</td>
<td>1</td>
</tr>
<tr>
<td>Independence</td>
<td>1</td>
</tr>
<tr>
<td>Main</td>
<td>1</td>
</tr>
<tr>
<td>Matthews</td>
<td>1</td>
</tr>
<tr>
<td>Mint Hill</td>
<td>1</td>
</tr>
<tr>
<td>Morrison</td>
<td>1</td>
</tr>
<tr>
<td>Mountain Island</td>
<td>1</td>
</tr>
<tr>
<td>Myers Park</td>
<td>1</td>
</tr>
<tr>
<td>North County</td>
<td>1</td>
</tr>
<tr>
<td>Plaza Midwood</td>
<td>1</td>
</tr>
<tr>
<td>Scillypark</td>
<td>1</td>
</tr>
<tr>
<td>South County</td>
<td>1</td>
</tr>
<tr>
<td>Steele Creek</td>
<td>1</td>
</tr>
<tr>
<td>Sugar Creek</td>
<td>1</td>
</tr>
<tr>
<td>University</td>
<td>1</td>
</tr>
<tr>
<td>West Iliad</td>
<td>1</td>
</tr>
</tbody>
</table>

Note: 1=Open
0=Close
Communications Plan

Goal: Charlotte Mecklenburg Library is known as an asset to its community, responsive to community needs and showing good stewardship of community resources by providing the best possible value and benefit with the resources available.
Communications Plan

• Measurable objectives in 5 categories:
  – Marketing/promoting suites of services
  – Influence public funding
  – Influence private funding
  – Maintain operational excellence/compliance
  – Provide customer service

• Measure: customer satisfaction results
Advocacy Plan

• Ties into public funding
• Two kinds:
  – Ongoing
  – Targeted
Ongoing Advocacy

Characteristics

- Informational
- Year-round
- Showing the value of libraries
- Debunking myths: “people don’t need/use libraries anymore”

Strategies are part of comm plan

- Awareness campaigns: National Library Week, Teen Tech Week, Teen Read Week, etc.
- Stories of impact
- Alliances: Friends, County, tourism authority, Chamber
Targeted Advocacy

Characteristics
- Geared toward a specific action
- Examples: Approve the budget, Give a donation, Pass a piece of legislation, etc.
- Has specific start and end date
- Has a call to action

Strategies are more specific
- Ask person A to contact person B
- Ask someone to speak at a meeting
- Ask someone to write a letter to the editor
- Provide information to those you want to act
- Work with allies from ongoing advocacy
Key Messages

• Master narrative
• Support key messages with storytelling to speak to head and heart
  – Head: Statistics, facts, economic impact
  – Heart: Stories of impact, how libraries change lives
ROI Study: broad benefits

- ROI Study conducted by UNC Charlotte Urban Institute
- Charlotte Mecklenburg Library returns $4.57 in direct benefits for every $1.00 invested from all sources.
Value calculator: personalized benefits
Stories of Impact

• Four parts:
  – Person
  – Problem
  – Library intervention
  – Happy ending

*From Jamie LaRue, Director, Douglas County Libraries, speaking at NCPLDA Conference
Sample Story of Impact

- **Person:** David
- **Problem:** ASVAB
- **Library Intervention:** Pam, Learning Express
- **Happy Ending:** Got into the field he wanted
Stories of Impact

• Build into existing communications strategies
  – Advocacy
  – Annual report
  – National Library Week
  – Media relations
  – Social media
    Ex: OCLC/LJ Roadshow videos
Programming Focus

- Literacy
- Educational Success
- Workforce Development
- Aligned with Mecklenburg County’s Critical Success Factors
Programming

• Cloud-based program portal
• Allows staff to track costs, staff time, attendance, outcomes
• Program catalogs for children, teens, and adults—created once, shared many times
Fully Costed Programming

Program Costs
- Supplies
- Giveaways
- Promotion, flyers, marketing
- Donor recognition items
- Mileage reimbursement

Personnel Costs
- Pay/benefits for # of staff hours spent planning, traveling, executing, evaluating or following up

Total Program Expense

Must be covered by program budget or philanthropy
Programming

- In FY12, the Library presented 743 unique programs a total of 8,677 times
- 440,385 people attended library programs, or an average of about 35 people/program
- The average full cost of a program was $67.98, including staff time and other costs
- Average cost per attendee was $1.34
Programming Outcomes

• 97% of parents/caregivers attending preschool programs reported they are better prepared to develop pre-reading skills in their children

• Pilot program at Long Creek Elementary—measuring impact of summer reading on learning retention/loss
• TAKEAWAYS
The Take-away: *What can you learn from our experience?*

- Identify your most critical funder as your strategic partner & primary customer
- Re-examine every process for efficiency
- Clearly articulate the value of libraries, before, during and after
  - ROI studies
  - Outcome measures
  - Stories of Impact
The Take-away: *What can you learn from our experience? (cont)*

- Citizens are looking for ways to contribute in meaningful ways
  - Fundraising
  - Volunteer opportunities
  - Becoming informed advocates

- Similarly, Staff responded in new and creative ways during the crisis
The Take-away: *What can you learn from our experience? (cont)*

- Libraries must understand how financial world affects the bottom line
- What libraries are going through is survivable
- The Task Force assisted us in strengthening our business model
• THE ROAD TO RECOVERY
Questions?
For more information & access to reports mentioned, visit cmlibrary.org/ULC