Charlotte Mecklenburg Library

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One Library's Experience Surviving the Great Recession

Charlotte Mecklenburg Library

Vick Phillips

CEO

Charlotte Mecklenburg Library

Library History

- *1900s-1940:* Carnegie & Great Depression
- *1940-1970s:* Growth & development
- *1970s-1990s:* Technology & expansion
- *1990s-2000s:* New ways to deliver services
- *2000s-2010:* Evolving to meet 21st Century needs

Library Awards

- *Library Journal "Five-Star" library*, 08 & 09
- *National Award* for Museum and Library Service, 2006
- *ALA Trustee Citation*, 2007
- *John Cotton Dana Award* for Library Public Relations, 2006

The Great Recession

- Week of October 8, 2007, DJIA hits 14,293
- Week of March 9, 2009, DJIA drops to 6,627
- Budget cuts began at the Library early 2009

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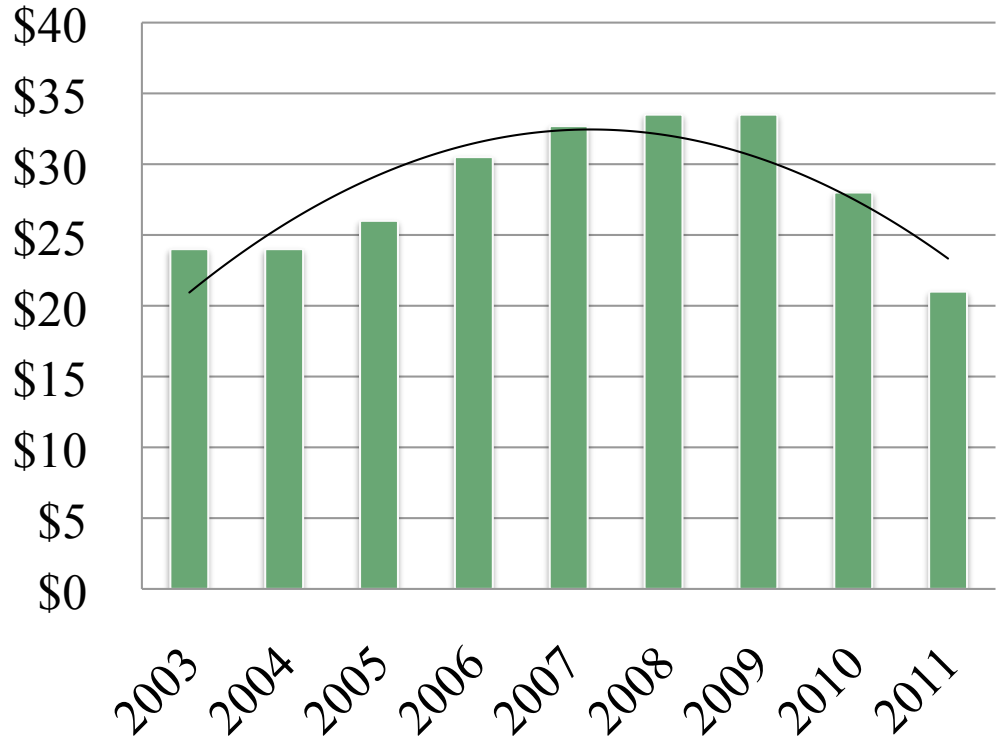
History of County Funding to Library



- Mecklenburg County funds approx 88-92% of the Library
- $25 million County funding in 2003
- $34.5 million County funding in 2008
- **2011 County funding is $21.2mm; 15.2% less than 2003**

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Recent reductions in Mecklenburg County funding

Date	Amount cut
January 2009	$750,000
July 2009	$3.67 million
April 2010	$2 million (3Q revision)
July 2010	$8.3 million

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What did the funding cut represent?

- 45% reduction in funding from previous fiscal year
- 50% reduction of library hours
- Closure of 4 branches
- Lay-offs of over 180

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Stabilization Plan – FY2010-11

- Mecklenburg's citizens respond
- City of Charlotte and small towns join in
- Future of the Library Task Force formed

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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

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Task Force Design Team: "Misconceptions"

- 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.

Task Force: "Misconceptions" *(cont)*

Task Force Conclusions 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 ranging from

– Development

– Programming

– Organizational Management

– Funding Partnership with Mecklenburg County

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

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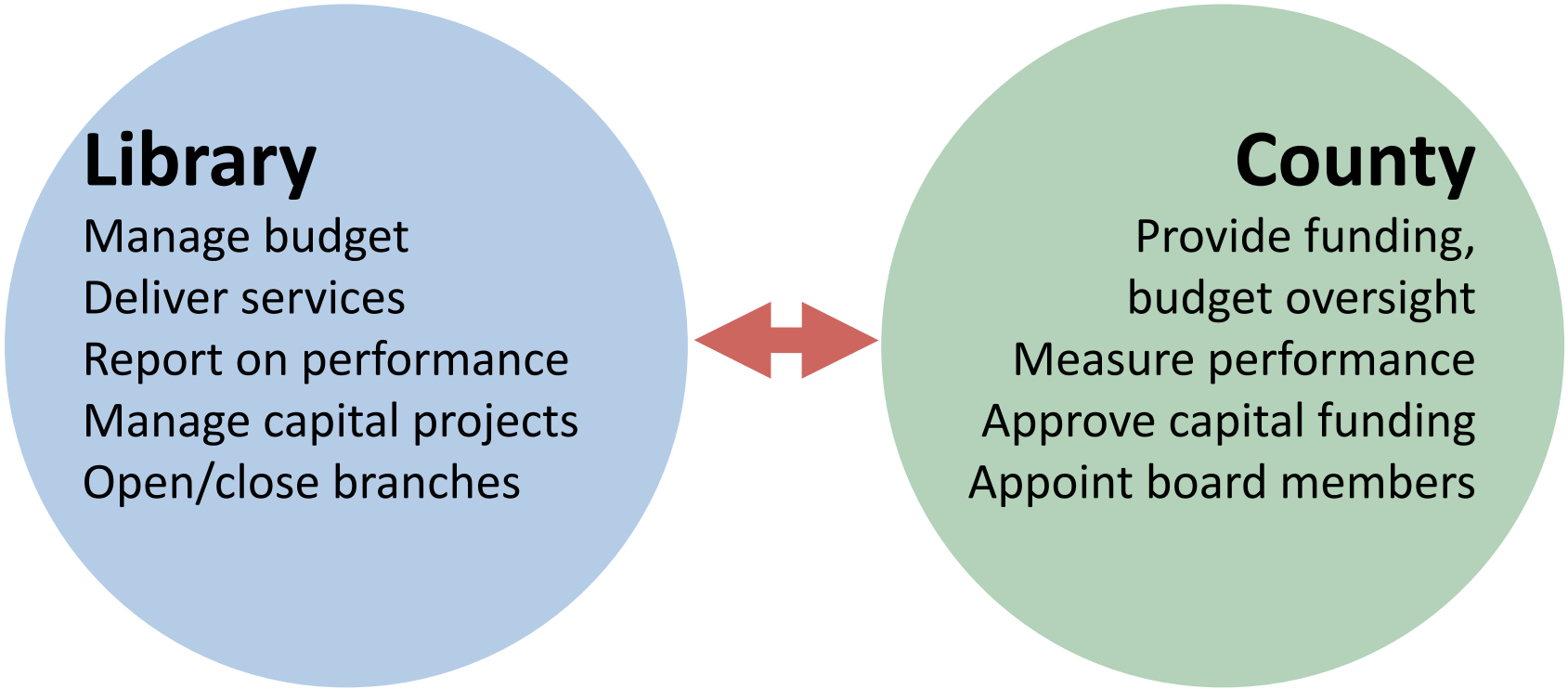
Old Library/County Partnership



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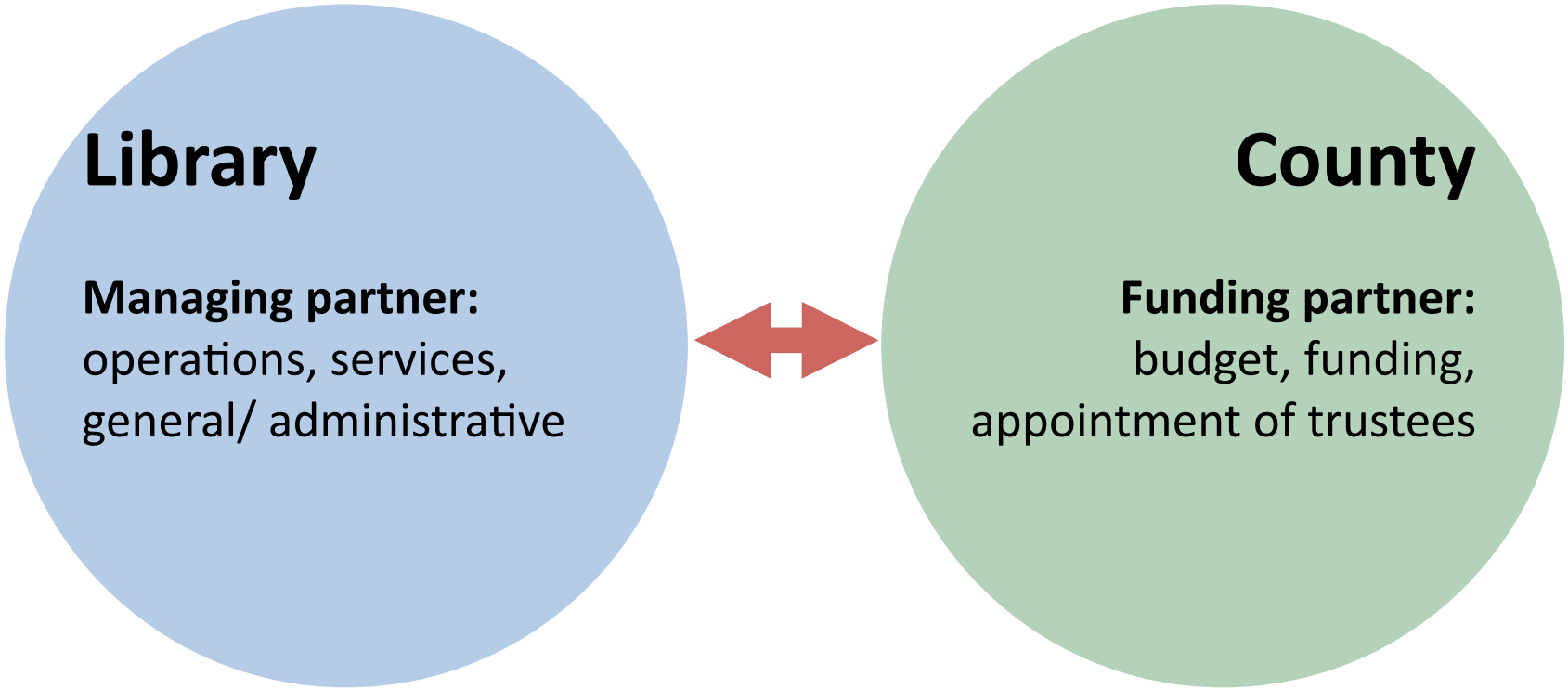
New Library/County Partnership



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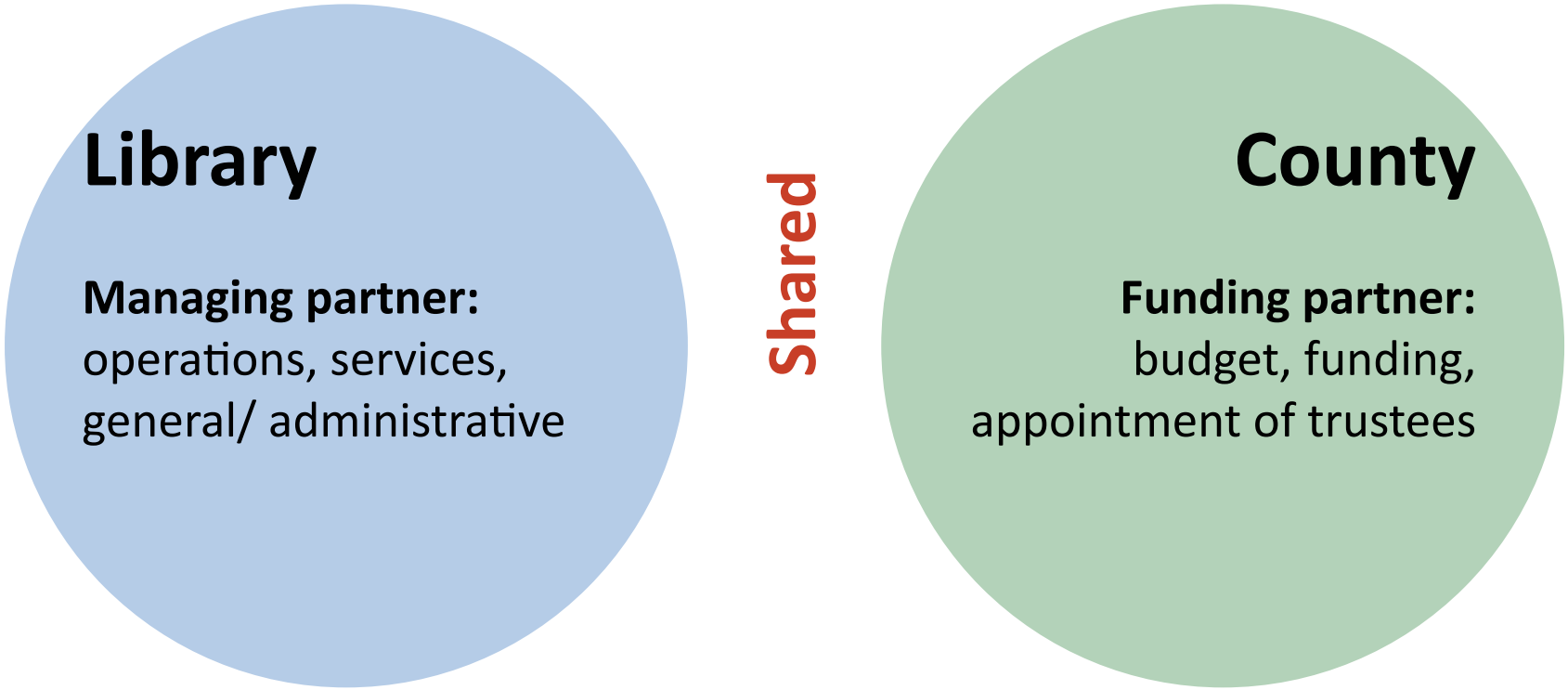
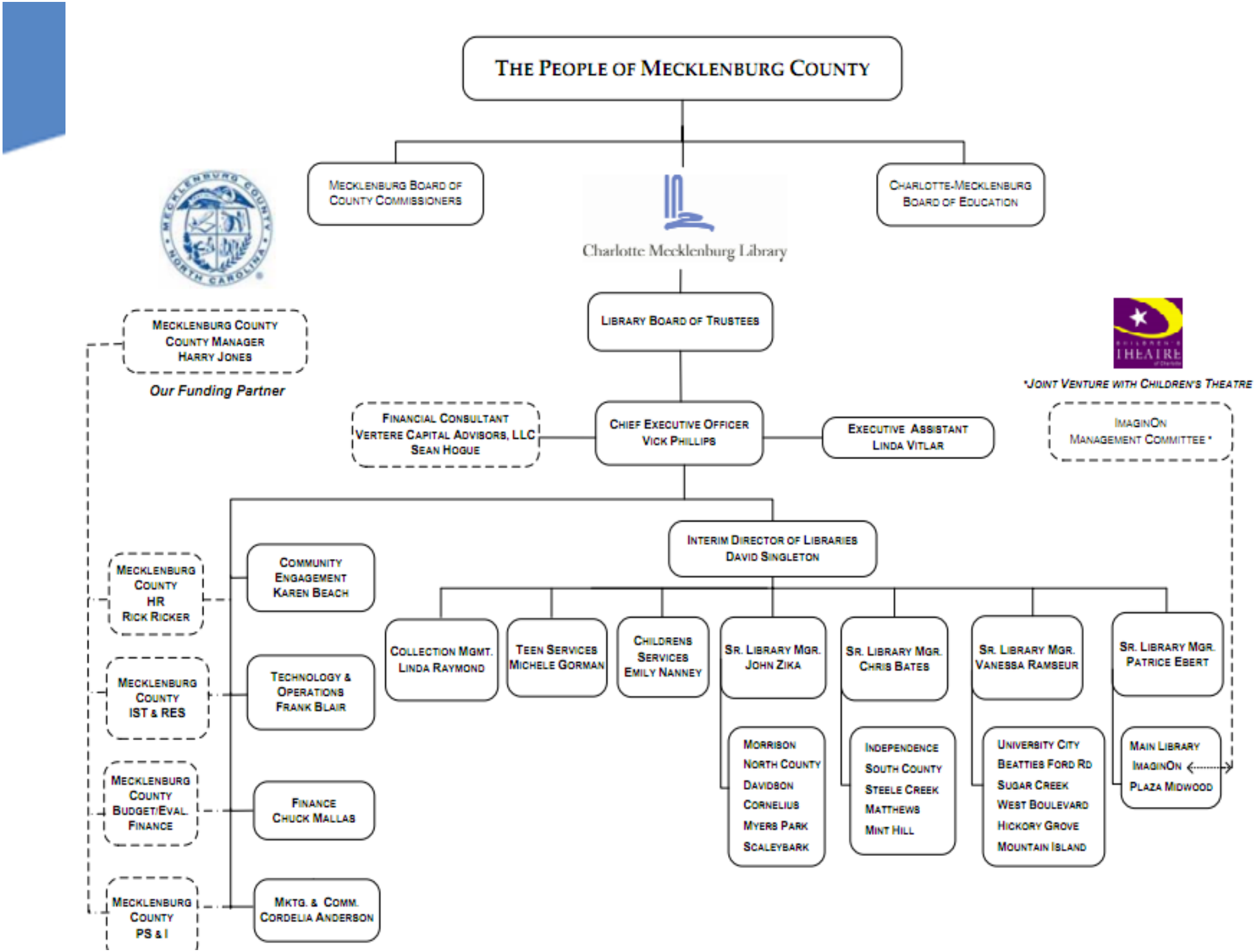
New Library/County Partnership




THE PEOPLE OF MECKLENBURG COUNTY
MECKLENBURG BOARD OF COUNTY COMMISSIONERS
CHARLOTTE-MECKLENBURG BOARD OF EDUCATION
Charlotte Mecklenburg Library
LIBRARY BOARD OF TRUSTEES
MECKLENBURG COUNTY COUNTY MANAGER HARRY JONES
Our Funding Partner
FINANCIAL CONSULTANT VERTERE CAPITAL ADVISORS, LLC SEAN HOGUE
CHIEF EXECUTIVE OFFICER VICK PHILLIPS
EXECUTIVE ASSISTANT LINDA VITLAR
*JOINT VENTURE WITH CHILDREN'S THEATRE
IMAGINON MANAGEMENT COMMITTEE *
INTERIM DIRECTOR OF LIBRARIES DAVID SINGLETON
MECKLENBURG COUNTY HR RICK RICKER
MECKLENBURG COUNTY IST & RES
MECKLENBURG COUNTY BUDGET/EVAL. FINANCE
MECKLENBURG COUNTY PS & I
COMMUNITY ENGAGEMENT KAREN BEACH
TECHNOLOGY & OPERATIONS FRANK BLAIR
FINANCE CHUCK MALLAS
MKTG. & COMM. CORDELIA ANDERSON
COLLECTION MGMT. LINDA RAYMOND
TEEN SERVICES MICHELE GORMAN
CHILDRENS SERVICES EMILY NANNEY
SR. LIBRARY MGR. JOHN ZIKA
SR. LIBRARY MGR. CHRIS BATES
SR. LIBRARY MGR. VANESSA RAMSEUR
SR. LIBRARY MGR. PATRICE EBERT
MORRISON
NORTH COUNTY
DAVIDSON
CORNELIUS
MYERS PARK
SCALEYBARK
INDEPENDENCE
SOUTH COUNTY
STEELE CREEK
MATTHEWS
MINT HILL
UNIVERSITY CITY
BEATTIES FORD RD
SUGAR CREEK
WEST BOULEVARD
HICKORY GROVE
MOUNTAIN ISLAND
MAIN LIBRARY
IMAGINON
PLAZA MIDWOOD

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David Singleton

Interim Director of Libraries

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Telling the Library Story (*pre –crisis)*

- Imagine 2010
  - *Goal* - to be the best public library in the US
  - Developed new organizational structure
  - Greater fundraising/advocacy role from *Friends of the Library*
  - Creating *Stories of Impact*
  - Return in Investment (ROI) study conducted by UNC-Charlotte's Urban Institute
  - *What's Your Library Worth?* value calculator

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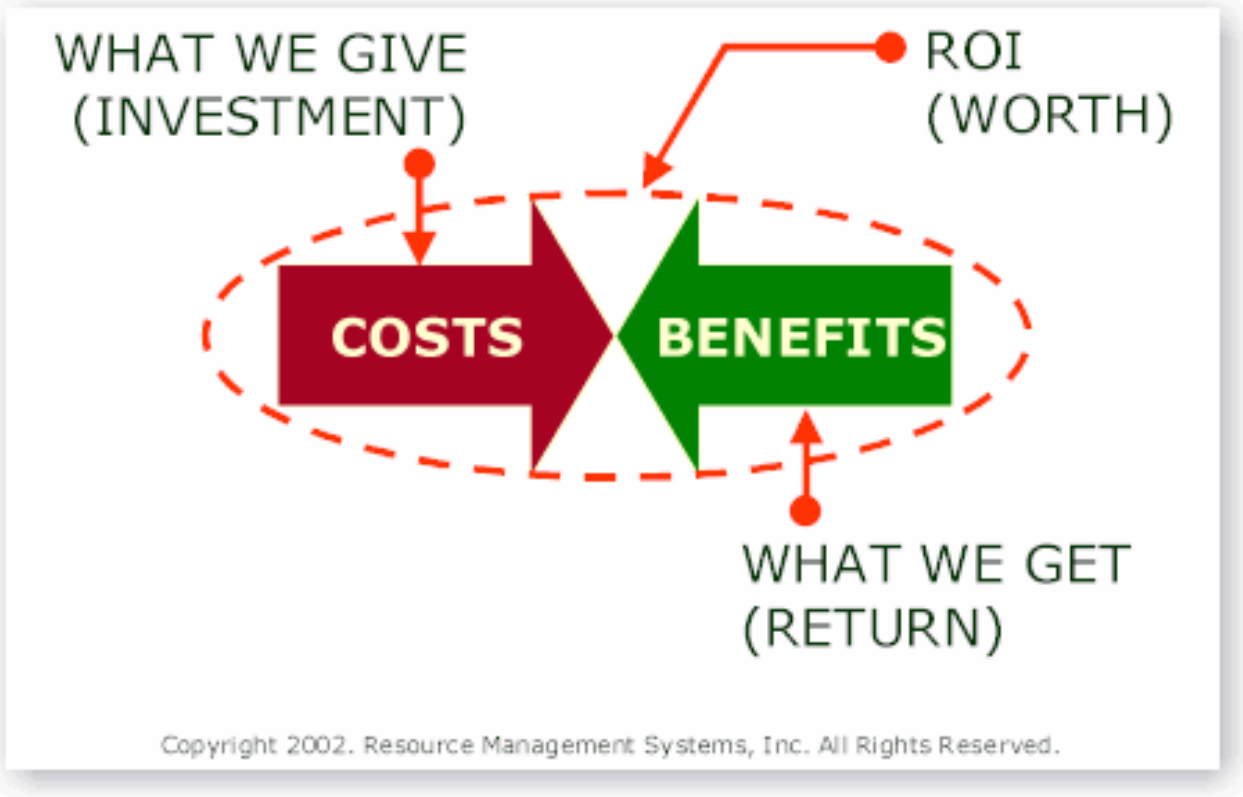
ROI Study

Charlotte Mecklenburg Library returns $4.57 in direct benefits for every $1.00 invested from all sources.



Explain and Send Screenshots

Charlotte Mecklenburg Library Value Calculator

My Yearly Benefit: $0.00

Libraries provide a valuable community resource.

To find out how much value you receive from The Charlotte Mecklenburg Library, complete the following survey... you may be surprised!

How often do you visit the Charlotte Mecklenburg Library?

○ weekly ○ bi-weekly ○ monthly

How many of each item/service do you typically use?

Hardcover Books	0	$20.00	$0.00
Paperback Books	0	$6.50	$0.00
Children's Books	0	$8.00	$0.00
Videos	0	$15.00	$0.00
Music CD	0	$13.95	$0.00
Audiobook	0	$39.95	$0.00
Magazines	0	$3.95	$0.00
Newspaper	0	$.75	$0.00
Adult Programs	0	$25.00	$0.00
Children's Programs/Classes	0	$6.95	$0.00
Children's online educational games found on CMLibrary [Story Place, Book Hive, etc]	0	$10.00	$0.00
Computer Use (hrly)	0	$12.95	$0.00
Reference Questions Asked (per hour)	0	$50.00	$0.00
Use of Research databases [Ancestry.com, Mango Languages]	0	$5.00	$0.00

my benefit: $0.00

http://www.cmlibrary.org/budget/library-calculator/calculator.html

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What's Your Library Worth?

Value calculator

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Service Impacts of Reductions

- Financial crisis of 2009 caused a shift in strategy
  - Approximately 1/3 of service staff *laid-off*
  - *Closure* of 4 of 24 library branches
  - *50% reduction of hours*
  - *Staggered hours of operations*
  - *Redistribution* of remaining staff
  - *Streamlining* of services/programs

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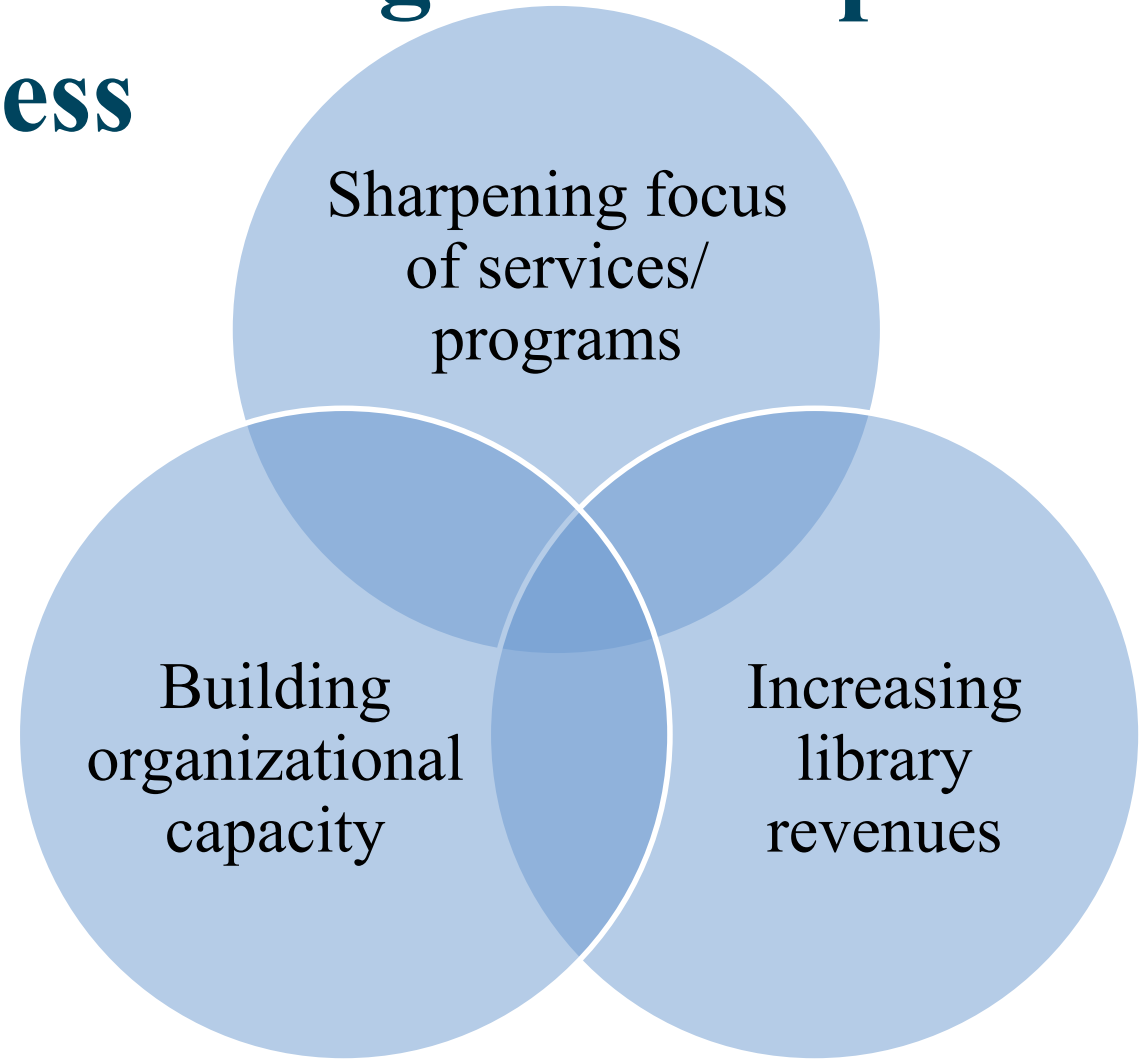
Three Strategies for Operational Success



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*

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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

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Increasing Revenues

- Fines & fees restructuring
- Community fundraising
  - *Targeted efforts most effective*
- Friends of the Library

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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

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The Future of Charlotte Mecklenburg Library

- CEO/Director of Libraries structure
- Main branch: citizen-led study group starting Fall 2011
- New Strategic Planning process
- Optimize relationship with our largest funding partner
- Continued leadership in library community

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 measurements
  - 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 their bottom line
- What libraries are going through is survivable
- The Task Force assisted us in strengthening our business model

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Questions?

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For more information & access to reports mentioned, visit *http://bit.ly/CMLAxiell*