



Charlotte Mecklenburg Library

Volunteers in Libraries

Future of the Library Task Force

11/30/2010

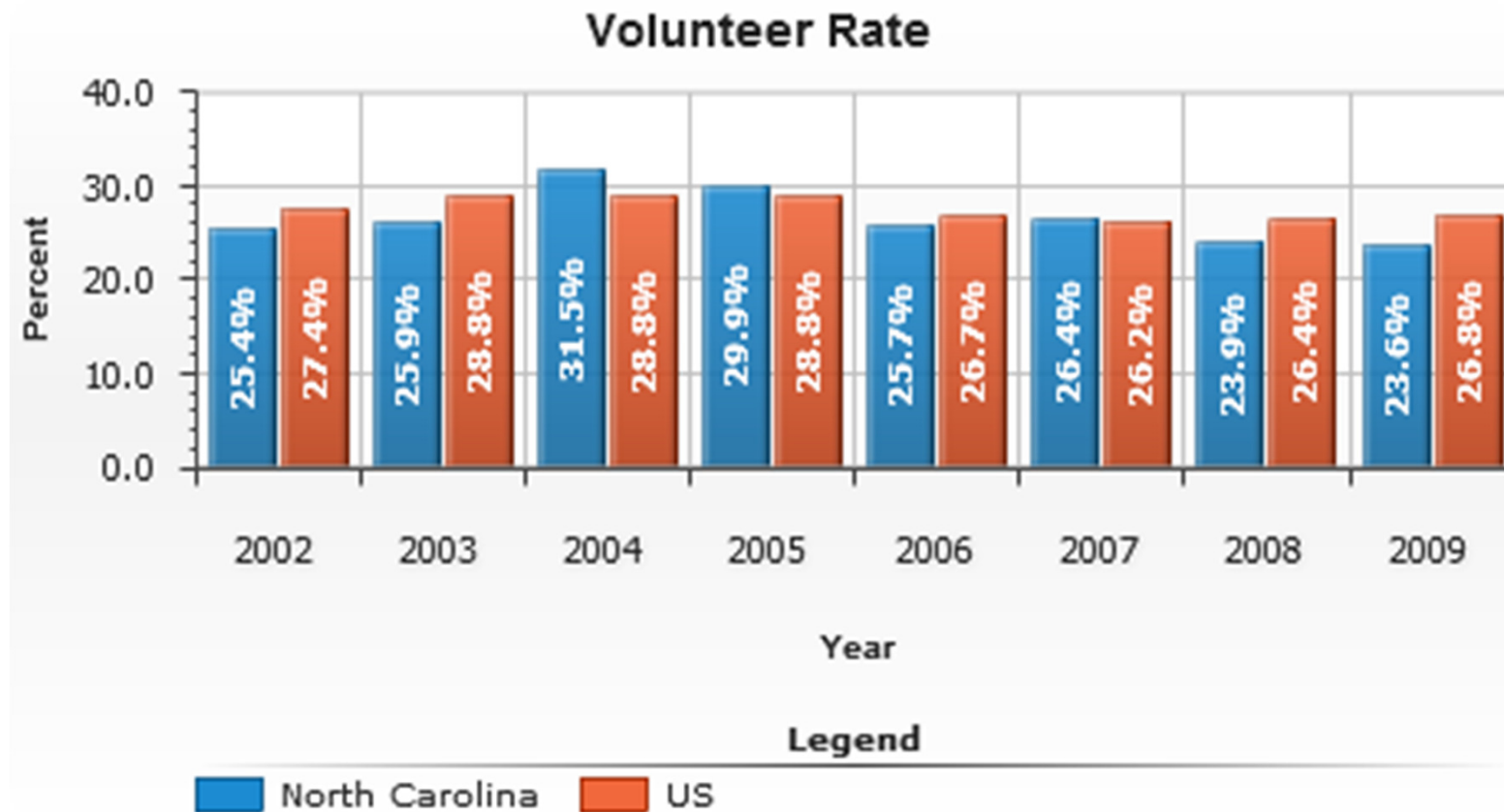


Information Included Today:

- Volunteerism in general – Nationally and in NC
- Volunteers in Public Libraries
- Volunteer Use at Charlotte Mecklenburg Library
- Optimizing Volunteers



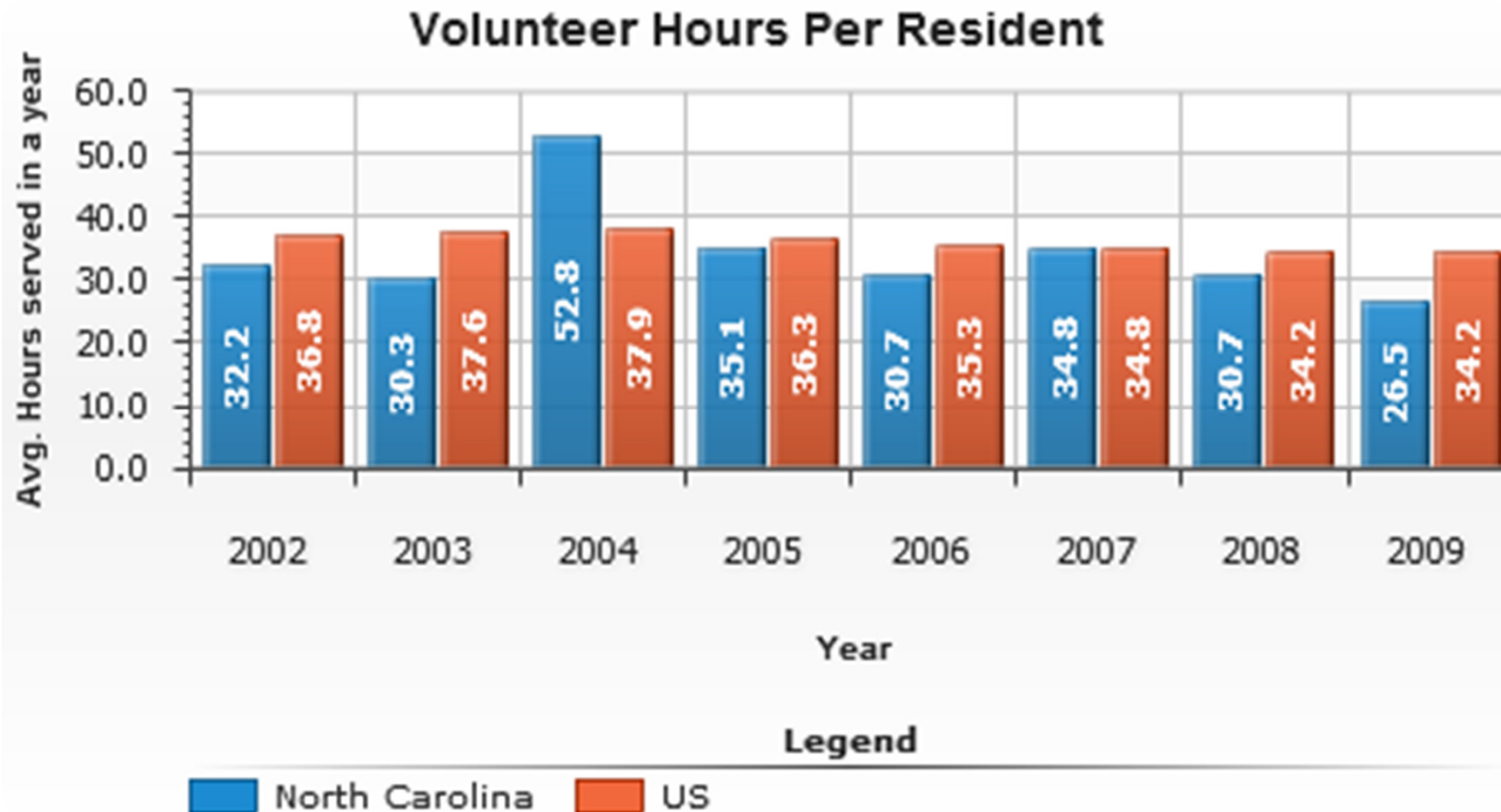
Volunteer Rate Trends: NC and U.S.



Source: www.volunteeringinamerica.gov



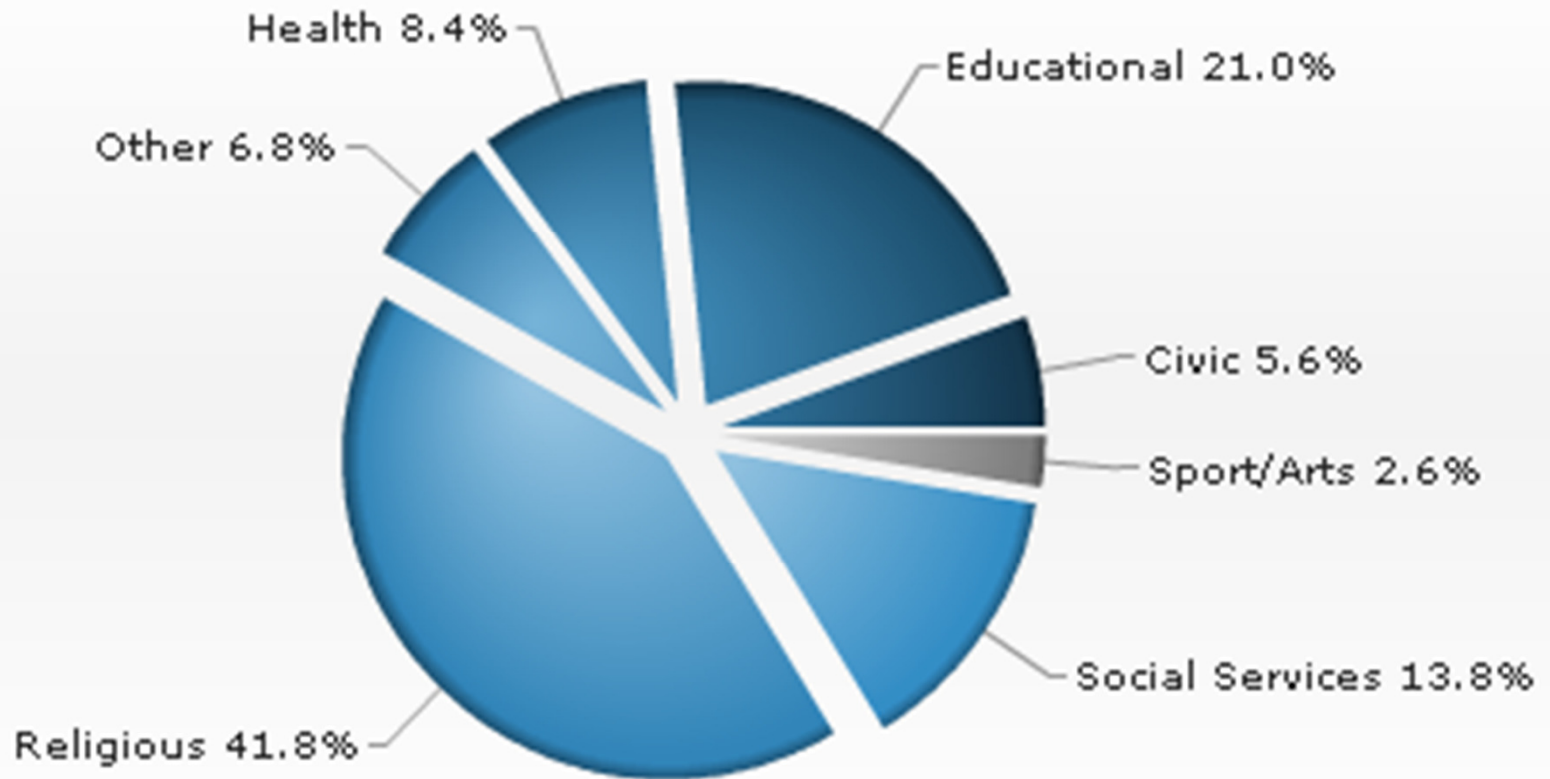
NC– Average Hours Per Year



Source: www.volunteeringinamerica.gov

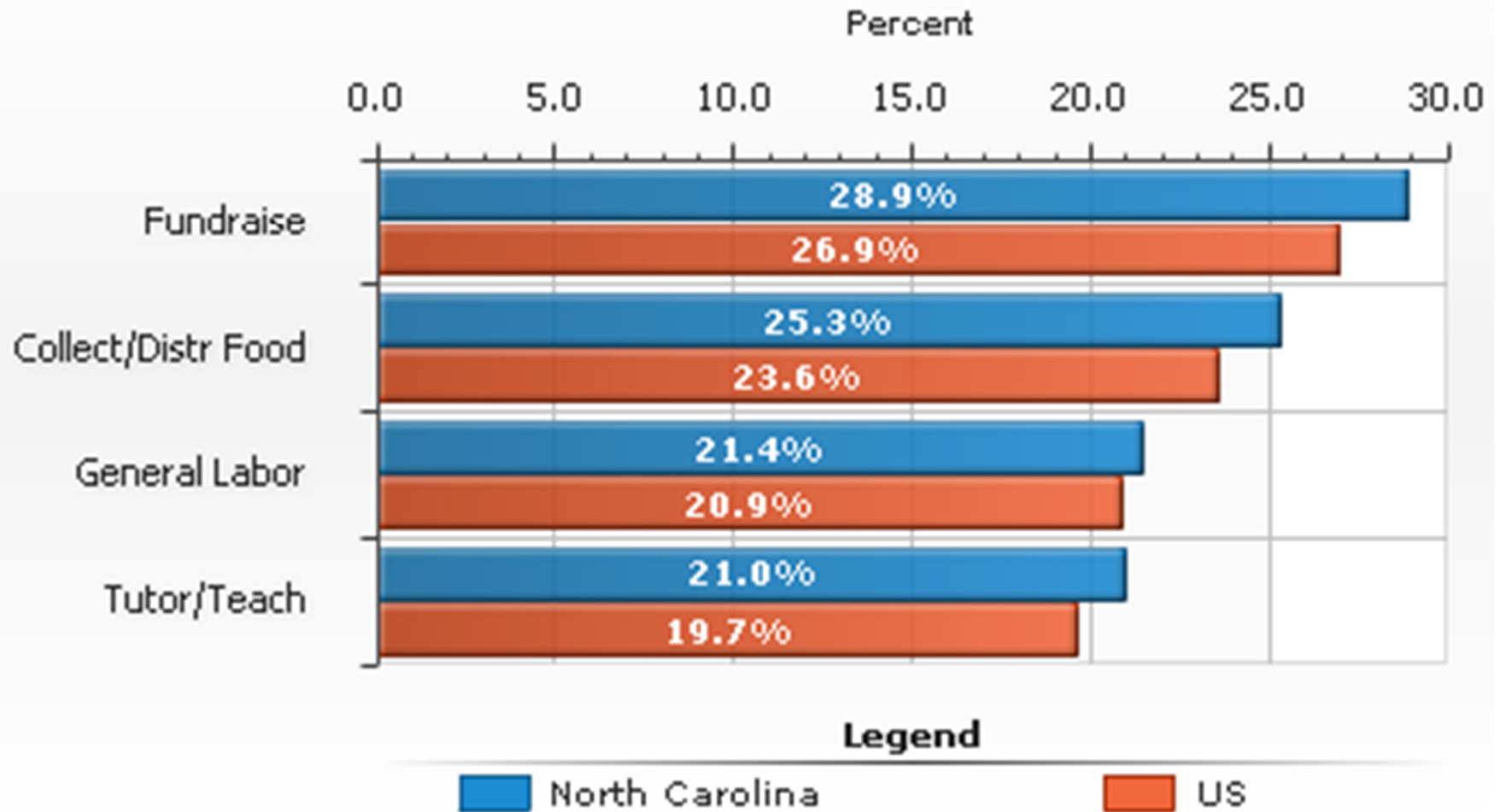


Where People Volunteer (2006-2008)





Top Four Activities





Generally Accepted Guidelines: Volunteers & Employees

- Volunteer work should ideally supplement, not replace work of paid staff.
- Can only be successful if paid staff know that volunteers are not there to replace them.



Volunteers in Public Libraries

- Before 1930's: Volunteers Provided Lending Services
- 1930's: Professional staff coordinated services; Volunteers widely operated libraries
- 1970's: Union movement in libraries; ALA established volunteer guidelines
- 1980's: Volunteer programs firmly established in American public libraries



ALA Guidelines & Reaction in 1970's:

- Volunteer Program must have prior approval of staff & governing body.
- Volunteers should not supplant or displace established staff.
- *Does not specifically address any duties or responsibilities of volunteers that might violate these guidelines .*



Legal Considerations

- A North Carolina law carries influence over the scope of volunteer programs in library settings: NC General Statute about requirement library record confidentiality
 - *§ 125-19. Confidentiality of library user records.(a) Disclosure. - A library shall not disclose any library record that identifies a person as having requested or obtained specific materials, information, or services, or as otherwise having used the library, except as provided for in subsection (b).(b) Exceptions. - Library records may be disclosed in the following instances:(1) When necessary for the reasonable operation of the library;(2) Upon written consent of the user; or(3) Pursuant to subpoena, court order, or where otherwise required by law.(1985, c. 486, s. 2.)*
- Because of privacy concerns of library records (who is a library member, who checks out what), **most public libraries do not use volunteers to check out books.**



Examples of Library Volunteer Roles

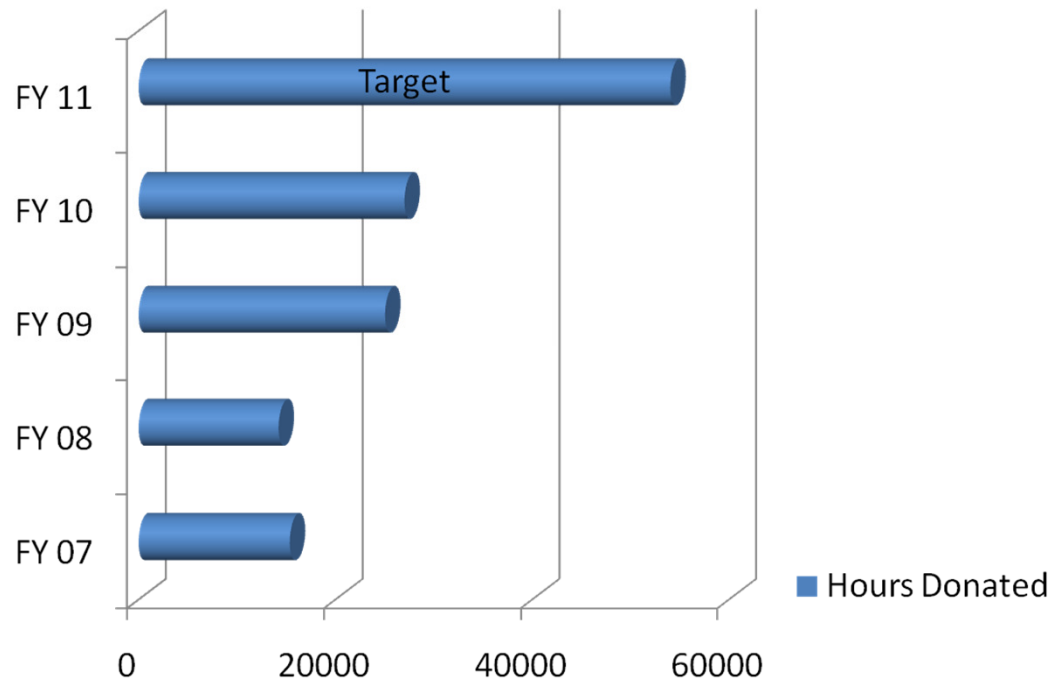
Allowed

- Shelving, shelf reading, pulling holds, unpacking materials via delivery, empty bookdrop
- Answer directional questions/greet customers
- Individual computer assistance
- Read informally to children, set up/tear down programs, prepare craft materials
- Organize booksales

Not Allowed

- Answer reference questions
- Work at information/public service desks
- Money handling tasks
- Answer incoming telephone calls
- Look at or resolve library users' accounts (fines owed, what's checked out, etc.)
- Building security/policy enforcement

Charlotte Mecklenburg Library Volunteer Trends





Volunteer Use Comparisons

City / County	Library Locations	Total FTE Staffing	Total # Volunteers	Hours Donated	Average Hours Per Week Per Volunteer	Volunteer to Staff Ratio
Jacksonville	21	344	236	30557.50	2.49	0.7
CMLibrary (October 2010)	20	289.25	557	5239.05	2.35	1.9
Denver	23	420	1412	102447.00	1.40	3.4
Memphis	19	309	400	27000.00	1.30	1.3
Wake Co	21	251.75	1322	77020.00	1.12	5.3
Columbus OH	22	429	1747	74996.00	0.83	4.1
Baltimore	17	578.5	922	30000.00	0.63	1.6
Atlanta/Fulton	34	365.5	2276	66957.00	0.57	6.2
Tampa	25	336	1518	44437.00	0.56	4.5



Volunteers: Staff Ratio

Library Location	Volunteer: Staff	Square Ft per Volunteer/Staff
Cornelius	10 : 1	143
Davidson	12 : 1	132
Matthews	6.8 : 1	161
Mint Hill	5.75 : 1	222

Jacksonville	0.7 : 1
Denver	3.4 : 1
Memphis	1.3 : 1
Wake Co	5.3 : 1

From previous slide, the other 4 libraries with more than 1 hr/week per volunteer



Are We Optimizing Volunteer Use?

No External Standards

Limited Research to Date

What one Canadian Study Shows



Interchangeability of Paid Staff and Volunteers—First Study

- Results from Survey of Canadian nonprofits, 661 responses
- 25.5% of organizations agreed that some activities carried out by volunteers today used to be performed by staff
- 14.9% said that there are employee concerns about being replaced by volunteers
- Budgetary cutbacks were the primary reason for the change

Source: Handy, Femida, Mook, Laurie and Quarter, Jack (2008) "The Interchangeability of Paid Staff and Volunteers in Nonprofit Organizations" *Nonprofit and Voluntary Sector Quarterly*, 37(1): 76-92.



Opposite Trends Noted in Study

- However, 57% of organizations said that some activities that used to be done by volunteers are now done by paid staff
- Increasing professionalization of the sector
- A small subset of organizations indicated both types of replacement



Interchangeability of Paid Staff and Volunteers—Second Study

- 3 years later - 428 responses from Canadian Nonprofits
- 67.8% indicated that there is some interchangeability of tasks between volunteers and staff
- In both studies, about 12-13% of tasks were interchangeable
 - **20-25% of tasks were done only by volunteers**
 - **65-69% of tasks were done only by staff**



Factors Determining What Employees Should Do

Factor	Overall	Service Nonprofits	Expressive Nonprofits
Number of hours required	19.3%		
Liability concerns		60.8%	31.5%
Certification required		52%	30.3%
Difficulty in recruiting		34.3%	47.2%
Skills required		73.5%	86.5%

Source: Handy, Femida, Mook, Laurie and Quarter, Jack (2008) "The Interchangeability of Paid Staff and Volunteers in Nonprofit Organizations" *Nonprofit and Voluntary Sector Quarterly*, 37(1): 76-92.



Optimized Volunteers at CM Library?

Volunteer Use Benchmarks

- Shelving – 90+%
- Processing Delivery Checkins – 50%
- Processing Book-Drop – 50%
- Processing Holds Requests – 50%
- Pulling Holds Requests – 90+%
- Pulling Expired Holds – 90+%
- Book sale maintenance – 90%
- Collection Maintenance (weeding / de-selection, missing reports, shelf reading) - 80%
- Mending damaged materials – 90%



Matthews Branch Library

Oct-09		Oct-10	
23 Volunteers	183.25 hrs. (7.97 avg per vol.)	81 Volunteers	646 hrs. (7.98 avg per vol.)
Staffing Level	18.5 FTE	Staffing Level	12 FTE
Operating Hours	66	Operating Hours	38
Volunteer: Staff Ratio	1.24 : 1	Volunteer: Staff Ratio	6.8 : 1



Indicators That Point to Charlotte Mecklenburg Library as the Benchmark

- **Sept 8:** [Shorter Hours, High Volume: How Charlotte Library Uses Volunteers as Stopgap](#) (Library Journal)
- **Aug 30:** ["Unprecedented" Use of Volunteers Helps Charlotte Mecklenburg Library Add Hours at Two Branches](#) (Library Journal)
- **Aug 23:** [Libraries Face Increasing Budget Cutbacks](#) (*Newsweek - Online*) –
- *Managing Library Volunteers*, set to be released in January 2011, extensively consulted with CMLibrary's Volunteer Coordinator regarding the structure of our volunteer program and the types of volunteer opportunities available.



What Do We Not Know?

- Long term sustainability of using volunteers.
- Scalability of volunteer use at different size locations and/or within different communities.



Charlotte Mecklenburg Library

Questions?



Charlotte Mecklenburg Library



Charlotte Mecklenburg Library

Fundraising in Libraries

Future of the Library Task Force

11/30/2010



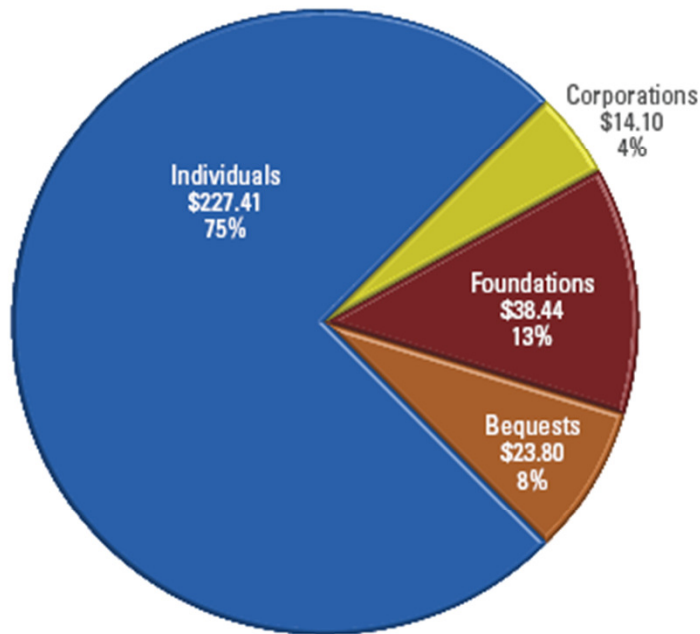
Information Covered Today:

- General Fundraising Trends
- Fundraising in Libraries: Why, How, How Much
- Fundraising by the Charlotte Mecklenburg Library



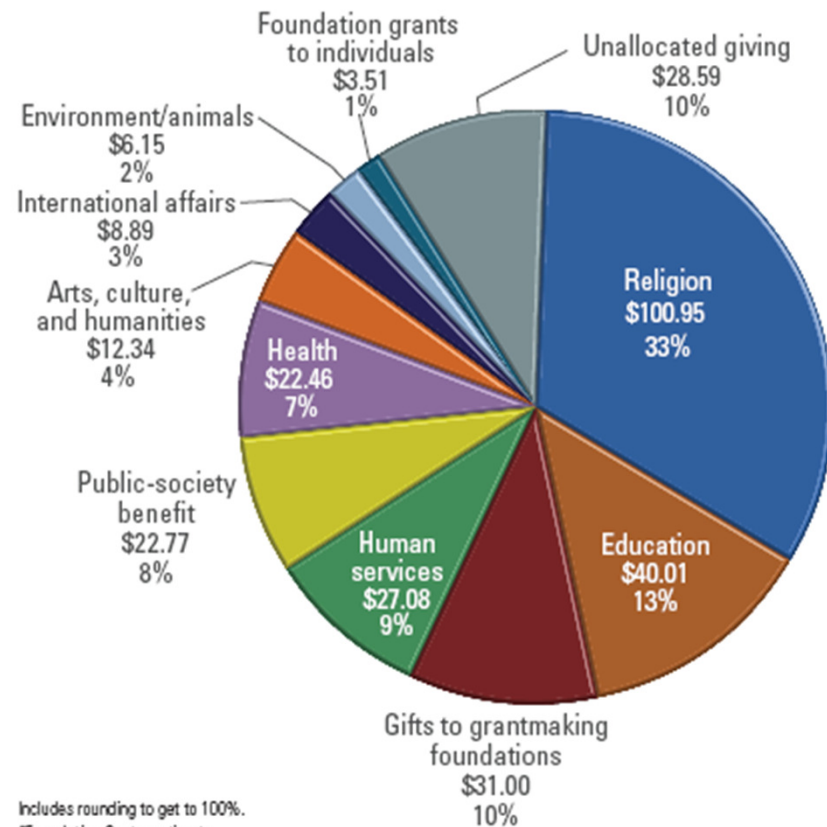
Who Gives?

2009 contributions: \$303.75 billion by source of contributions
(\$ in billions – All figures are rounded)



Where Does It Go?

2009 contributions: \$303.75 billion by type of recipient organization
(\$ in billions – All figures are rounded)



Includes rounding to get to 100%.
*Foundation Center estimate

Source: Giving USA (www.givingusa.org)



National Giving Headlines

- Donors Plan to Give the Same or Less This Year (*Chronicle of Philanthropy*, Oct 21, 2010)
- Gifts Grew Slightly in Summer, But the Giving Forecast is Cloudy (*Chronicle of Philanthropy*, Nov 4, 2010)
- 2010 Fund-Raising Figures are Grim for Many Charities, Study Finds (*Chronicle of Philanthropy*, Nov 29, 2010)



Snapshot of Fundraising in Charlotte

- ASC raised \$7.3M drive in 2010, versus \$7.2 M raised on a goal of \$11.2M in 2009
- Informal poll of fundraising colleagues shows some are seeing:
 - Same level of funding this year
 - Less than year before
 - More than year before



Why are Libraries Raising Funds?

- Not for basic operations; not % of operating budget
 - * Carnegie Library of Pittsburgh is one exception
- For program/service enhancements, i.e.
 - Additions to books/materials
 - Early literacy programs
 - Summer Reading programs
 - Humanities and Cultural programs
 - Technology enhancements
- For special capital & endowment needs
 - *Seattle: deep cleaning, furniture repair/replacement



How Libraries Are Raising Funds

- Direct mail, email/phone/web solicitations
- Personal Asks
- Sponsorships & Grants
- Fundraising Events (dinners, booksales)
- Planned Giving (bequests)

**Most Libraries have separate 501c3
fundraising board & staff infrastructure
(*Friends, Library Foundation*)**



Comparison of Fundraising in Libraries

Library	Funds Raised	Staff	\$ Per Staff	Previous Year	Structure	Endowment Funds
Charlotte Mecklenburg	\$1,993,583	1.5	\$1,329,055	\$467,414	Dev. Dept	\$2,000,000
Seattle	\$2,352,800	3	\$784,266	\$3,292,129	501c3	\$26,736,864
Jacksonville	\$134,411	3	\$44,803	\$1,320,930	501c3	\$0
Atlanta-Fulton	\$108,693	1.5	\$72,426		Dev Dept/501c3	unknown
Nashville	\$903,626	3	\$301,209	\$1,452,654	501c3	\$3,034,782
Multnomah Co. (Portland)	\$3,243,991	7.5	\$432,532	2,903,685	501c3	\$9,165,034
Durham County	\$175,097			459,780	501c3	unknown
St. Paul, MN	\$3,431,563	8	\$428,945		501c3	\$9,351,104
Free Library (Philadelphia)	\$10,600,000	36	\$294,444		501c3	\$21,000,000
Queens, NY	\$1,937,000	8	\$242,125		501c3	\$5,891,111
Pittsburgh	\$4,000,000	7	\$571,428		Dev Dept/501c3	\$10,301,237



Endowment Building

- Long-term funding strategy
- Of libraries surveyed, generally see mix of both permanently restricted & quasi-restricted endowment mix
- CMLibrary has endowment established at Foundation For The Carolinas
 - Typical payout is approx. 5% each year of interest earned: \$2M endowment = \$100K/year



What Are We Doing This Year?

- Branch out from “usual” names; Build relationships with new corporate & foundation funders
- Try out new kinds of funding partnerships (i.e., Bobcats/Sprite “Blocks for Books”; Neiman Marcus raffle)
- Event fundraising – first major dinner/author event, to help cultivate increased/new individual giving
- Collection boxes in library branches for small donations
- Text to Donate giving courtesy of Bank of America



Friends of the Public Library of Charlotte & Mecklenburg County

- A separate 501c3 organization established in the mid-80's
- Focus is Advocacy & Grassroots Fundraising
- Coordinated Efforts between Friends and Development Dept.
- 2010 most successful year thus far:
 - New 5K Race to benefit the library
 - Major booksale



Looking Ahead...

- Possibility of creating an organization dedicated to raising funds to benefit the Charlotte Mecklenburg Library
- In 2004, Vandever Batten provided an initial assessment and recommendations about creating a Library Foundation
- Need to be thoughtful in examining advantages/disadvantages of various models.



Charlotte Mecklenburg Library

Questions?