

Data Used to Assess a Library Collection

Standard data collected to help with an assessment include material expenditures per capita, circulation per capita, volumes per capita, and collection turnover. These four points of data are maintained for Virginia libraries each year, so we can see where we stack up. The JMRL numbers below indicate a service population of 221,000.

[Standards for Virginia Libraries](#) (Standards for Collections start on p. 32)

- **Materials expenditures per capita** is the average dollar cost per person of purchasing newly acquired materials. Does not take into account the cost of processing library materials. Our service population has increased over the last ten years but [our state aid has decreased](#) - so using just state aid for materials is not sustainable as the population grows. Proliferation of formats means that “more money” doesn’t just mean “more items”; it can also mean allowing greater access to existing information.

The state numbers include expenditures per capita, but do not break it down materials vs operating, etc., so no direct comparison can be made from available data. Nationwide numbers for materials expenditure per capita: mean (2016) was \$5.19 and median was \$4.29 per capita for populations our size.

- JMRL FY18 materials spending including grants/gifts: \$733,547.13, so \$3.31 per cap.; without the board grant and gifts (just the state aid): \$623,330.00, so \$2.82 per cap.
 - JMRL FY17 materials spending including grants/gifts: \$713,386.17, so \$3.23 per cap; without board grant and gifts (just the state aid): \$621,785, so \$2.81 per cap.
 - Five years ago, the Crozet Library was expanded and the Technical Services team also embarked on improving acquisitions workflow - resulting in a marked increase in efficiency, both in purchasing and processing. [In the last five years, JMRL has added 46,700 physical items to the collection each year on average.](#) In the five years previous to that, 28,200 were added on average annually. This does not include the increase in digital materials that has also occurred.
- **Circulation per capita** is the average number of loans made to each person annually. Lower circ per capita can mean the collection isn’t meeting the community’s needs (through either quality or quantity), or that the community is unaware of the library’s resources. **We have a high circulation per capita with relatively low spending - which means the community is utilizing those collection dollars.**
 - JMRL FY18 circ per cap: 8.3
 - JMRL FY17 circ per cap: 7.6
 - (indicates total circ, physical and digital, per population served)
 - Median for VA in 2017: 4.56; average 6.15

- **Volumes (or holdings) per capita** is literally the number of items held per population served. Since quantity does not indicate quality, this number is only useful in relation to other numbers, like turnover and circ per capita. - **we have fewer volumes per person but did more circ per capita - which means our collection is working hard; also our patrons have access to relatively fewer items than others in Virginia**
 - JMRL FY18 items per cap: 2.7
 - JMRL FY17 items per cap: 2.7
 - **State standard: 2 for level A, 3 for level AA, 4 for level AAA**
 - Median for VA in 2017: 5.47; average 8.71

- **Turnover** relates the number of circulations to the size of the collection, and indicates how often each item in the collection was used, on average. A busy collection will have higher turnover, and indicates both greater usefulness to the populace and a greater need for replacement/reconditioning of materials (i.e. more funding for such). Turnover for physical materials and for digital materials should be calculated separately, and turnover for each section of the collection (subject area, genre, format) can vary widely and can be judged in individual assessments against collection as a whole or across time against that section itself.
 - JMRL FY18 total turnover: 3.5
 - physical turnover: 3.4
 - digital turnover (of curated collection): 6.4
 - JMRL FY17 total turnover: 3.4
 - physical turnover: 3.3
 - digital turnover (of curated collection): 7.0
 - Median total turnover for VA in 2017: 0.84, average 1.3 - **again, our collections are busier on average and so we can expect that they are useful to the community but also that they will be worn out - requiring more resources to maintain**

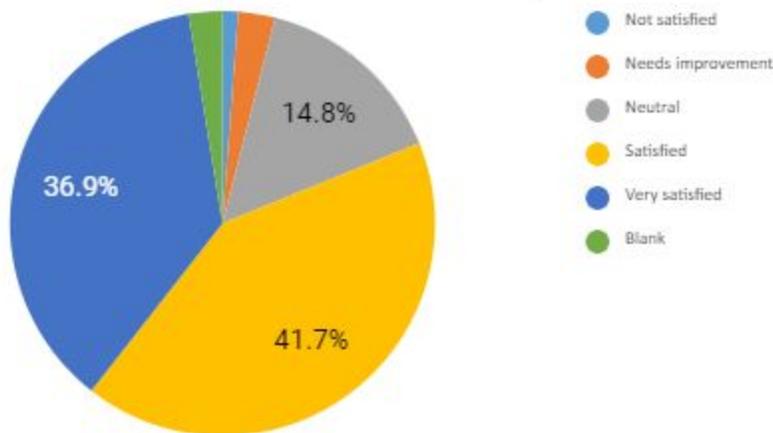
- Tracking **materials expenditures as a percent of total operating expenditures** can indicate a library's commitment to its collection.
 - State standard: (None for level A); For level AA, "The library shall spend 15 to 20 percent of its operating budget to purchase collection materials, and a minimum of 10 percent of the materials budget for non-print resources."
 - JMRL has in Goal 4 of the current Five Year Plan: "Objective #6: By FY2019, the Library Board will allocate at least 15% of the library's annual operating budget for the purchase of materials for the collection (see Goal #5; Objective #1)."
 - 15% of FY19's operating budget (\$8,236,847) would be \$1,235,527. **Currently appropriated for materials in FY19 (all from state aid): \$608,295, or 7.4% of the operating budget.**

Other potentially interesting stats to examine:

- Wait times/fulfillment:** JMRL doesn't currently have an efficient means to track wait times for holds fulfillment. We do maintain holds ratios as much as budget allows within parameters set in the Collection Management Guide. The Guide sets a fairly standard 5:1 ratio for regular print material and 10:1 for alternate formats. That is, when a title gathers more than five holds per circulating copy, more copies are purchased to meet this demand. Using funds to purchase high-demand items increases our turnover and circulation, but reduces the breadth and diversity to the collection, so we are mindful of a need for balance here.
- Suggestion fulfillment:** JMRL also tracks number of patrons suggestions for purchase and percentage of those suggestions purchased. Keeping in mind that some suggestions are impossible to purchase and some are fulfilled by interlibrary loan, it's still a means to track that we are able to be responsive to community input for selection. In FY18, we were able to purchase around 85% of individual patron suggestions. This percentage will drop without additional funds.
- Age of collection:** is definitely a tool we can use to assess the collection, or parts thereof; however, if expenditures per capita are maintained (that is, new items are consistently being purchased), and proper collection management happens (i.e. weeding), this should align with other points of data (turnover, holdings). A change in the above-reported data might indicate an old collection (shabby or non-current, or both), and we would address that accordingly.

“Softer” means of assessment (such as user feedback) is important as well. The current feedback survey for JMRL’s FY20-24 strategic plan included many responses asking for improved and diversified collections in many formats.

How satisfied are you with the books, movies and music available at the library? How satisfied are you with the b...



Collections was one of the few feedback areas not to have over 50% of the responses at the highest level (5 of 5). Many comments were directed at the need for more resources devoted to the library collection, and checking out materials was the top answer for library services most important to respondents.



AGENCY ENDOWMENT FUND AGREEMENT

This Agency Endowment Fund Agreement is made as of the ____ day of _____, 20__ between The Friends of the Jefferson-Madison Regional Library, a Virginia nonstock corporation (the “Agency”), and Charlottesville Area Community Foundation, a Virginia nonstock corporation (the “Foundation”).

RECITALS

A. The Agency and the Foundation have a common interest in the welfare of the Charlottesville area community and in serving charitable and educational purposes for the benefit of the Charlottesville area community.

B. The Agency and the Foundation are each an organization described in section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “Code”) and classified as an organization other than a private foundation within the meaning of section 509(a) of the Code (hereinafter referred to as a “qualified charitable organization”).

C. It is consistent with the mission and purpose of the Foundation to accept, receive and administer funds as endowments for various charitable and educational purposes and organizations in the Charlottesville area community.

D. The Agency currently has five endowment funds established with the Foundation and wishes to establish additional endowment funds with the Foundation. These funds are identified as on Appendix A attached hereto.

E. The Agency desires that all of the endowment funds established with the Foundation be administered under the terms of this Agreement as a family of endowment funds to be used to provide current income and long-term protections for the Agency and the Jefferson-Madison Regional Library in accordance with the purposes of each of the endowment funds.

E. The Agency believes that individuals and entities will make contributions to these endowment funds to support the Agency.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties agree as follows.

1. **The Family of Funds.** The endowment funds for the benefit of the Agency shall include those endowment funds currently established with the Foundation (as identified in bold on the attached Appendix A) and those additional endowment funds to be established under this Agreement and identified on Appendix A. All of these funds as identified on Appendix A shall be known collectively as The Friends of the Jefferson-Madison Regional Library Family of Endowment Funds (the “Funds”) and individually by the names as set forth in Appendix A. The Foundation shall hold and administer the Funds on behalf of the Agency in accordance with the terms of this Agreement. Those of the Funds established previously with the Foundation shall continue to consist of the current balances held in those funds. The other funds being established under this Agreement shall be funded with contributions from the Agency or other donors. All contributions to the Funds or any of the Funds shall be held and administered in accordance with the terms of this Agreement.
2. **Purposes of Funds.** Subject to the provisions of this Agreement, the Funds shall be used *solely* for support of the charitable or educational purposes of the Agency and its affiliates, if any, subject to any additional restrictions on the use of any of the Funds as specified in Appendix A.
3. **Use of Income and Spending Policy.** Except as otherwise provided in this Agreement, income from the Funds will be expended only for the purposes of the Funds. Income shall not be limited to actual earnings, but instead the amount available for distribution shall be determined in accordance with spending and other policies established by the Foundation’s Governing Board in effect from time to time. Income not expended may be reinvested in the principal of the Funds or accumulated for distribution in future years in the discretion of the Foundation’s Governing Board. Notwithstanding the foregoing, the Agency may request distributions in excess of income as set forth below.
4. **Advisors.** The Funds shall be advised by an Advisory Committee consisting of those individuals set forth in Appendix B. The Advisory Committee shall convene at least once annually, in May of each year, and shall advise the Foundation of its recommendations for use of the Funds and to review the status of the Funds.
5. **Advisory Privileges.** The Advisory Committee, from time to time, may suggest charitable organizations to which distributions from the Funds may be made. Any recommendations from the Advisory Committee shall be advisory and final judgment rests with the Foundation’s Governing Board whose charge is to see

that all distributions are consistent with the charitable purposes for which the Funds were established as set forth in section 2 and are within the broad charitable purposes of the Foundation as set forth in its articles of incorporation, bylaws, and resolutions of its Governing Board. The Foundation has exclusive legal control with respect to the investment and distribution of the income and assets of the Funds. Notwithstanding the foregoing, the Foundation shall make no distribution from the Funds unless such distribution has been previously recommended by the Advisory Committee or unless necessary for tax-related purposes. The Advisory Committee may request distributions in excess of income by submission of a request detailing the rationale and need for such distribution satisfies one or more of the following requirements: (a) the distribution would enable the Agency to acquire or renovate a capital asset of the Jefferson-Madison Regional Library or to support the construction of a new Jefferson-Madison Regional Library facility, (b) the Agency is faced with unexpected financial needs that are unlikely to recur and the distribution will enable the Agency to meet those financial needs, or (c) the distribution is believed to be in the best interests of the community as determine by the Foundation's Governing Board or Executive Committee. Any such request remains subject to approval by the Foundation's Governing Board, and the Agency shall have no rights to direct or compel the Foundation to make such distribution from the Funds.

6. **Expenses of Administration.** For its services, the Foundation shall be entitled to take and receive compensation from the Funds in accordance with its published fee schedule as in effect from time to time. A copy of the Foundation's fee schedule as in effect on the date of this Agreement has been provided to the Agency.
7. **Investments.** The Foundation's Governing Board shall have full authority and discretion as to the investment of assets of the Funds. The Funds will be invested as part of the Foundation's main investment pool under policies established by the Foundation's Governing Board.
8. **Additional Contributions.** The Agency and others may made additional contributions to the Funds from time to time, and such additional contributions shall be subject to the provisions of this Agreement.
9. **Variance Power and Other Matters.** It is understood and agreed that all assets of the Funds shall be subject to the variance power and other provisions of governing documents of the Foundation, including, without limitation, the power contained therein for the Governing Board to modify any restrictions or conditions on distributions from the Funds, if in its sole judgment, such restriction or condition becomes incapable of

fulfillment. The Foundation shall promptly notify the Agency of the Governing Board's decision to exercise the variance power. Notification of the exercise of such power shall be delivered in writing to the last known address of the Agency within thirty (30) days following the Governing Board's decision. The Foundation shall also notify the Agency if it becomes aware of any other action instituted or proposed by any person to vary the purposes, uses or method of administration of the Funds. The Agency may provide the Foundation with any information it deems appropriate for consideration regarding the Foundation's decision to exercise its variance power.

10. **Change in Status or Dissolution.** If the Foundation ceases to be a qualified charitable organization or if the Foundation proposes to dissolve, the assets of the Funds shall, after payment or making provision for payment of any liabilities, properly chargeable to the Funds, be distributed to the Agency. If the Agency is not then a qualified charitable organization, the assets of the Funds shall be distributed to Jefferson-Madison Regional Library, or if Jefferson-Madison Regional Library is not then a qualified recipient, then such assets shall be distributed in such a manner and to such organization or organizations in the Charlottesville area community as satisfies the requirements of a qualified charitable organization or government agency and serves purposes similar to those of the Agency. In the event the Agency ceases to exist or is no longer a qualified charitable organization, the income of the Funds shall be distributed to Jefferson-Madison Regional Library, or if it is not then a qualified recipient, the Funds shall be added to the general endowment funds of the Foundation.

11. **Miscellaneous.** This Agreement contains the entire understanding of the parties with respect to the subject matter of this Agreement. This Agreement supersedes and cancels all other agreements and understandings, both written and oral, between the parties relating to the subject matter of this Agreement. This Agreement shall be binding upon and inure to the benefit of the successors of the respective parties. This Agreement shall be governed by the laws of the Commonwealth of Virginia and by any applicable provisions of the federal tax laws regarding charitable organizations such as the Foundation and the Agency. The Funds are intended to be a component part or parts of the Foundation and are not a separate trust or trusts. This Agreement shall be interpreted and administered in a manner consistent with (a) the Foundation's status as a qualified charitable organization.

IN WITNESS WHEREOF, each the Agency and the Foundation have executed this Agreement (in duplicate) by their duly authorized officers effective as of the day and year first above written.

**THE FRIENDS OF THE JEFFERSON-MADISON
REGIONAL LIBRARY**

CHARLOTTESVILLE AREA COMMUNITY FOUNDATION

BY _____
(Authorized Signature)

BY _____
(Authorized Signature)

TITLE _____

TITLE _____

SEEN AND AGREED:

THE JEFFERSON-MADISON REGIONAL LIBRARY

BY _____
President Board of Trustees

BY _____
Director

**Appendix A: List of Endowment Funds included in Family of Funds
(limitations to be enforced by the Advisory Committee)**

1. **The Nerancy Fund**, uses limited to support libraries within the City of Charlottesville
2. **The Rachel Poole Fund**, uses limited to educational purposes
3. **The Celia Martin Fund**, unrestricted as to use
4. **The Art and Jane Hess Fund**, unrestricted as to use
5. **The Greene Country Library Fund**, uses limited to support the Greene County Library
6. The Central Library Fund, uses limited to support the Central Library
7. The Crozet Library Fund, uses limited to support the Crozet Library
8. The Gordon Avenue Library Fund, uses limited to support the Gordon Avenue Library
9. The Louisa County Library Fund, uses limited to support the Louisa County Library
10. The Nelson Memorial Library Fund, uses limited to support the Nelson Memorial Library
11. The Northside Library Fund, uses limited to support the Northside Library
12. The Scottsville Library Fund, uses limited to support the Scottsville
13. The Bookmobile Fund, uses limited to support the Bookmobile

Appendix B – Advisory Committee

- President, Friends of the Jefferson-Madison Regional Library
- Vice President, Friends of the Jefferson-Madison Regional Library or other officer, Friends board
- President, Board of Trustees of the Jefferson-Madison Regional Library
- Vice President, Board of Trustees of the Jefferson Madison Regional Library
- Director, Jefferson-Madison Regional Library
- Treasurer, Friends of the Jefferson-Madison Regional Library (who shall be a non-voting member of the Advisory Committee)