

State Aid Budget Meeting

Library Board of Trustees

November 13th, 2023

J. Robert Jamerson Memorial Library

157 Main Street

Appomattox, VA 24522

(434) 352-5340

Members Present

Susan Williams

Evelyn Ford

Hope Adams

Madeline Abbitt

Others Present

Katharine Bloodworth, Interim Director / Public Services Specialist

Kim Armentrout – Library of Virginia Grants and Data Coordinator

Call to Order

Library Board Chairperson Evelyn Ford called the training session to order at 4:00pm.

Minutes

This is not a regularly scheduled Library Board meeting but a State Aid Budget meeting that included the slide show “State Aid to Public Libraries” presented by Kim Armentrout from the Library of Virginia.

Kim discussed the following:

What is State Aid

Uses from State Aid

Determining Eligibility

The Financial Requirements

How is State Aid Determined

This presentation was followed by a question and answer session.

Adjournment

State Aid Budget Meeting was adjourned at approximately at 5:00pm

The next meeting of the Library Board of Trustees will take place on Thursday, November 16th, at 4:00pm in the conference room of the J. Robert Jamerson Memorial Library.

Minutes taken by Katharine Bloodworth

State Aid to Public Libraries



What is State Aid?

- ▶ Began with \$50,000 General Assembly appropriation FY1943
- ▶ Full funding (of the formula) last achieved FY2001 @ \$20,485,543
- ▶ FY2020 was funded @ \$16,543,514 (60%)



Uses for State Aid

- ▶ Books and materials
- ▶ Salaries of full-time, certified librarians
- ▶ Internet access
- ▶ Equipment
- ▶ Furniture
- ▶ Supplies
- ▶ Contractual services
- ▶ Fellowship



Key to Determining Eligibility

Must directly relate to making services accessible or available to the library's clientele.

(See Instructions on InfoCenter)



Requirements Which Must Be Met In Order To Receive Grants-In-Aid

17VAC15-110-10.

All libraries serving more than 5,000 persons
must meet these requirements.

OR

17VAC15-90-20.

For Libraries Serving a Population of Less Than 5,000



The Financial Requirements - #1

- ▶ Have local operating expenditures per capita of at least 50% of the median statewide local operating expenditures per capita...



50% of the Median Spreadsheet

| | | | | |
|---|---------|-------------------|----|-------|
| Augusta County Library | 74,809 | \$1,231,021 | \$ | 16.46 |
| Blue Ridge Regional Library | 84,115 | \$1,362,348 | \$ | 16.20 |
| Fluvanna County Public Library | 26,133 | \$405,885 | \$ | 15.53 |
| Cumberland County Public Library | 9,857 | \$152,995 | \$ | 15.52 |
| Meherrin Regional Library | 34,295 | \$519,012 | \$ | 15.13 |
| Powhatan County Public Library | 28,696 | \$434,017 | \$ | 15.12 |
| Wythe-Grayson Regional Library | 44,388 | \$660,240 | \$ | 14.87 |
| Caroline Library, Inc. | 29,704 | \$428,656 | \$ | 14.43 |
| Madison County Library, Inc. | 13,099 | \$188,017 | \$ | 14.35 |
| Nottoway County Library System | 16,106 | \$223,083 | \$ | 13.85 |
| Alleghany Highlands Regional Library | 21,526 | \$283,465 | \$ | 13.17 |
| Richmond County Public Library | 9,029 | \$118,604 | \$ | 13.14 |
| Massanutten Regional Library | 157,545 | \$1,830,689 | \$ | 11.62 |
| Halifax County-South Boston Library System | 35,584 | \$404,898 | \$ | 11.38 |
| Russell County Public Library | 27,697 | \$313,551 | \$ | 11.32 |
| Lunenburg County Public Library System, Inc | 12,365 | \$139,662 | \$ | 11.29 |
| J. Robert Jamerson Memorial Library | 15,388 | \$172,879 | \$ | 11.23 |
| Heritage Public Library | 28,148 | \$274,632 | \$ | 9.76 |
| Craig County Public Library | 5,216 | \$23,280 | \$ | 4.46 |
| | | | | |
| | | Median | \$ | 23.31 |
| | | 50% of the Median | \$ | 11.66 |



The Financial Requirements - #2

- ▶ ...two-thirds of which must be from taxation or endowment. . .



Two-Thirds Spreadsheet

| | | | | | | |
|--|-------------|-------------|-----------|-----------|-------------|--------|
| Essex Public Library | \$293,048 | \$205,431 | \$25,213 | \$40,000 | \$270,644 | 92.35% |
| Massanutten Regional Library | \$1,830,689 | \$1,658,356 | \$0 | \$27,823 | \$1,686,179 | 92.11% |
| Allegheny Highlands Regional Library | \$283,465 | \$260,828 | \$0 | \$0 | \$260,828 | 92.01% |
| Galax-Carroll Regional Library | \$591,430 | \$386,266 | \$156,166 | \$0 | \$542,432 | 91.72% |
| Mecklenburg County Public Library | \$580,051 | \$479,601 | \$50,745 | \$0 | \$530,346 | 91.43% |
| Alexandria Library | \$7,703,385 | \$7,032,622 | \$0 | \$0 | \$7,032,622 | 91.29% |
| Lonesome Pine Regional Library | \$1,880,100 | \$1,602,270 | \$100,842 | \$11,492 | \$1,714,604 | 91.20% |
| Eastern Shore Public Library | \$773,937 | \$541,707 | \$140,417 | \$5,503 | \$687,627 | 88.85% |
| Williamsburg Regional Library | \$6,255,237 | \$5,490,253 | \$0 | \$10,500 | \$5,500,753 | 87.94% |
| Shenandoah County Library | \$958,531 | \$792,410 | \$15,925 | \$33,285 | \$841,620 | 87.80% |
| Pamunkey Regional Library | \$4,376,415 | \$3,779,886 | \$57,044 | \$0 | \$3,836,930 | 87.67% |
| Richmond County Public Library | \$118,604 | \$103,660 | \$0 N/A | | \$103,660 | 87.40% |
| Halifax County-South Boston Library System | \$404,898 | \$293,643 | \$54,257 | \$0 | \$347,900 | 85.92% |
| Cumberland County Public Library | \$152,995 | \$115,450 | \$15,935 | \$0 | \$131,385 | 85.88% |
| Smyth County Public Library | \$916,405 | \$742,912 | \$20,275 | \$6,308 | \$769,495 | 83.97% |
| Samuels Public Library | \$1,176,018 | \$979,134 | \$0 | \$0 | \$979,134 | 83.26% |
| Central Virginia Regional Library | \$862,004 | \$666,350 | \$28,663 | \$6,456 | \$701,469 | 81.38% |
| Caroline Library, Inc. | \$428,656 | \$232,610 | \$103,641 | \$0 | \$336,251 | 78.44% |
| Madison County Library, Inc. | \$188,017 | \$131,972 | \$0 | \$2,120 | \$134,092 | 71.32% |
| Lancaster Community Library | \$443,677 | \$114,003 | \$0 | \$180,000 | \$294,003 | 66.27% |
| Highland County Public Library | \$108,177 | \$66,382 | \$0 | \$0 | \$66,382 | 61.36% |
| Northumberland Public Library | \$251,425 | \$143,263 | \$0 | \$0 | \$143,263 | 56.98% |
| Middlesex County Public Library | \$229,407 | \$119,000 | \$1,316 | \$0 | \$120,316 | 52.45% |

The Financial Requirements - #3

- ▶ ...Local operating expenditures from taxation or endowment for any library system shall not fall below that of the previous year.



Waiver Request Example

Explain extenuating circumstances that resulted in the decrease in local expenditures and the good faith effort made to maintain local expenditures for the library;

Compare the decrease in funding of library services to decreases in funding of other local government services.

Complete chart:

| Government Function | Average Per Cent Reduction |
|---------------------|----------------------------|
| Education | |
| Human Services | |
| Public Safety | |
| Commerce & Industry | |
| Transportation | |
| Libraries | |

Describe impact of the reductions on library services. Be specific.

Detail locality commitment and plans to restore library services curtailed by the reduction in funding.

If you have any questions, please contact Kim Armentrout by email at kim.armentrout@lva.virginia.gov or by phone at 804-692-3601.



Requirements . . .

- ▶ Have certified librarians in positions as required by state law. Libraries failing to do so will have SA reduced by 25%.
- ▶ Keep open a headquarters or centrally located branch at least 40 hours a week . . . [including] 3 consecutive evening hours [after 5pm] and appropriate weekend hours.



Requirements . . .

- ▶ Maintain an up-to-date reference collection and offer interlibrary loan
- ▶ Organize materials for use
- ▶ Stimulate use of materials through publicity, displays, etc.
- ▶ Lend guidance in all outlets to individuals in the use of informational, educational, and recreational materials



Requirements . . .

- ▶ Maintain a collection of currently useful materials by annual additions and systematic removal of items no longer useful.
- ▶ Provide basic services . . . free of charge to the public as required by law



Requirements . . .

- ▶ Every regional library serving more than 400 square miles or more than 25,000 persons must provide some form of extension service.
- ▶ If the library system has two or more service units . . . , it must maintain a scheduled, frequent delivery system.



Requirements . . .

- ▶ The Library Board may, at its discretion, make exemptions for a specified period of time to any single requirement .



How Is State Aid Determined?

- ▶ *Code of Virginia* based formula
- ▶ Dependent on appropriation by General Assembly
- ▶ Calculations based on data supplied by libraries and other sources
- ▶ Awarded by The Library Board each June



The Formula

- ▶ Local effort: 40% of every dollar expended by the locality; not to exceed \$250,000.
- ▶ *Plus*
- ▶ Per capita: 30 cents for the first 600,000 persons served, plus 10 cents per capita for each additional jurisdiction
- ▶ *Plus*
- ▶ Square mileage: \$10 per square mile, plus an additional \$20 per square mile for libraries serving more than one political jurisdiction



Examples of State Aid Calculations



FY09 Loudoun County

- ▶ Population: 269,505
(Derived from Weldon Cooper population data)
- ▶ $.30 \times 269,505 = \$80,822$
- ▶ Plus...



FY09 Loudoun County

- ▶ Square Miles: 520
- ▶ $520 \times \$10 = \$5,200$

▶ Plus...



FY09 Loudoun County

- ▶ Local Effort: \$10,210,787
(As reported in Certified Financial Statement
FY06)
- ▶ $\$10,210,787 \times .40 = \$4,084,315$
(Cap of \$250,000 applied)



FY09 Loudoun County

- ▶ Population: \$80,882
- ▶ Mileage: \$5,200
- ▶ Local Effort: \$250,000 cap
- ▶ Total Eligibility: \$336,082
- ▶ Pro-Rata Change: 68%
- ▶ Amount Granted: \$227,986



FY21 Central VA Regional

- ▶ Population: 40,201
(Derived from Weldon Cooper population data)
- ▶ $.40 \times 40,201 = \$16,080$
- ▶ Plus...



FY21 Central VA Regional

- ▶ Square Miles: 934
- ▶ $934 \times \$30 = \$28,020$

▶ Plus...



FY21 Central VA Regional

- ▶ Local Effort: \$688,348
(As reported in Certified Financial Statement
FY19)
- ▶ $\$688,348 \times .40 = \$275,339$



FY21 Central VA Regional

- ▶ Population: \$16,080
- ▶ Mileage: \$28,020
- ▶ Local Effort: \$275,339
- ▶ Total Eligibility: \$319,439
- ▶ Pro-rata Change: 62%
- ▶ Amount Granted: \$198,794



State Aid Compliance Review

- ▶ See Documentation Schedule on InfoCenter
- ▶ See Requirements Which Must Be Met In Order to Receive Grants in Aid



Importance of Your CFS

- ▶ Determines the amount of state aid you are eligible to receive
- ▶ I will be checking for:
 - Maintenance of local effort (i.e. decreases)
 - 50% median statewide local operating expenditures per capita
 - 66% expenditures from taxation or endowment



If Non-Compliant . . .

- ▶ The Library Board has power to grant waiver.
- ▶ Waivers are not automatic. I will work with you to present your case to the Board.
- ▶ If waiver not approved = loss of 100% of state aid grant



It Has Happened...

- ▶ FY2009 Nottoway County,
- ▶ FY2008 Craig County and
- ▶ FY1983 Bristol Public Library

“failure to maintain local expenditure”



For more information

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kim.armentrout@lva.virginia.gov

