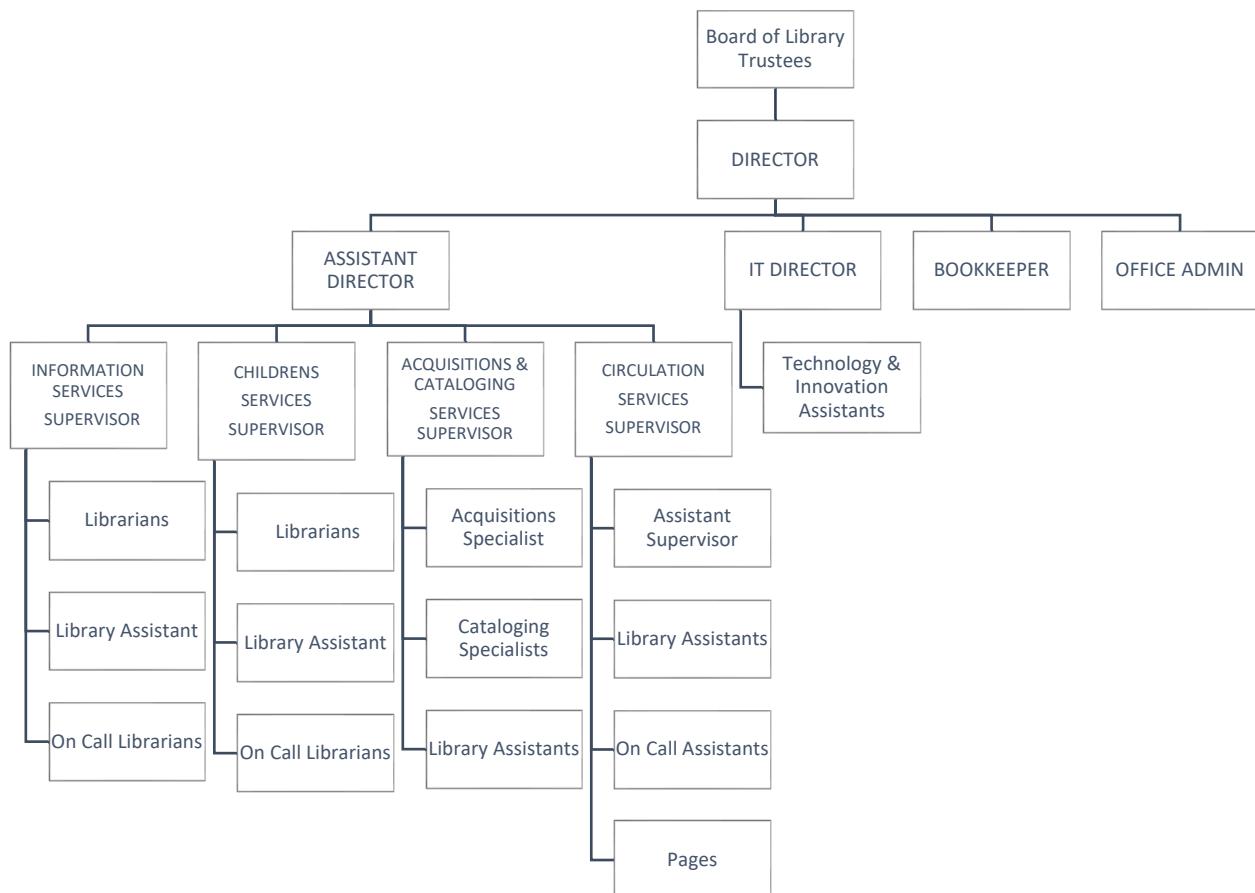




### **Mission Statement**

The mission of the Wellesley Free Library is to serve as a community gathering place, a cultural destination, and a gateway to ideas for residents of all ages and interests. Through comprehensive collections and innovative spaces, technologies and programs, the Wellesley Free Library provides free and convenient access to information both within and beyond its walls.

### **Organizational Chart**



## **Board of Library Trustees**

The Board of Library Trustees is responsible for overseeing the management of the Wellesley Free Library (WFL), which includes the Main Library at 530 Washington Street, the Wellesley Hills Branch at 210 Washington Street and the Fells Branch at 308 Weston Road. In addition, the library hosts a very robust website that can be considered a “virtual branch.”

## **Department Description**

The Wellesley Free Library (WFL) circulated 517,471 items in FY22, including 376,718 books. Over 7,500 patrons of all ages attended 550 live and virtual library programs, a substantial increase from FY21. Almost 80 volunteers donated over 3,100 hours of service to the library. The Covid pandemic and building upgrades affected the WFL in FY22, with the Main Library closed for renovation and roof replacement from April to early November 2021. A “Temporary Main” located at 30 Central Street was open from May through September 2021. The branches re-opened to the public in April 2021, but the Commonwealth did not lift pandemic capacity restrictions until May 29, 2021. The newly-renovated Main Library re-opened to the public in November 2021. In addition to offering print and non-print materials (DVDs, CDs, audio books, Library of Things), the WFL offers access to databases, e-books, digital magazines, and downloadable audio. During the pandemic, patrons took full advantage of the library website which provides extensive online access to library materials and services.

The WFL is a part of three information technology networks: the Minuteman Library Network, a wide area network consisting of 41 libraries in 60 locations; the WFL local area network (LAN) which enables file and print sharing for staff, internet connectivity and printing for wireless users; and the town network (2 computers within WFL) which allows the library department to access MUNIS, Town email and Wellesley’s integrated financial software package.

## **FY24 Priorities**

The FY24 priorities for the WFL arise from the 2019-2023 Library Strategic Plan (which can be found on the WFL website). The primary goals this year are to reassess and improve staffing given the changing post-pandemic employment realities and to meet the needs of the community with a focus on Children’s and Information Services. Like other employers, the Library has struggled to hire and retain part-time workers: one way to address this issue is by combining equivalent part-time hours into full-time positions even though the Library expense budget is negatively affected by \$20,000 for each new full-time position.

WFL also strives to meet the growing technology needs of patrons and staff. Technology priorities for FY24 include an in-depth cyber-security audit and managing its new IT advancements, including the new meeting room online reservation system and Office 365 integration. The Library is working to settle its open contract with the Association Staff and Supervisor Units. Development of the Library’s Five-Year Strategic Plan is currently underway, with the goal of approving the plan at the May 2023 Trustee Meeting.

## **Tax Impact Budget**

The WFL base operating budget currently meets the 3% guideline established by the Select Board for FY24, though without a settled contract, finalized budget numbers are not possible. The tax-impact WFL budget provides funding for all core services, including staffing, materials, and technology. Enhancements to the library – such as the English as a Second Language (ESL) program, educational and cultural events, museum passes, collection additions (e.g., Overdrive Advantage<sup>1</sup>, specialty items like the Short Story Dispenser), technology and innovation initiatives like digitizing the Wellesley Townsman – are funded outside of the tax-impact budget, primarily through the Wellesley Free Library Foundation and the Friends of the Wellesley Free Library.

The WFL collects fees for lost and damaged materials and late fines for overdue materials. Monies received from late fines (\$16,061 in FY22) go directly to the Town's General Fund, rather than the WFL. In FY22, the WFL also turned back \$62,982 from its operating budget to the General Fund, largely because of reduced hiring during Covid.

Personal services comprise 76% of the FY24 tax-impact library budget while the remaining 24% is allocated for expenses. The FY24 operating base budget does not include any increase for Library Association members per the guidance of the Finance Department. The increase in personal services reflects the known FY24 pay scale; step increases and longevity for union staff (including part-time steps gained for each 1,820 hours of work); and HR-compliant guideline increases for the four non-union administrative and management staff members. Also included are shift differentials for employees working after 5 pm and on weekends and earned longevity payments. As recommended by the Human Resources Board, the WFL's FY24 budget includes a 3% increase for all 40 Series employees and a 2% COLA increase for all 50 and 60 Series employees. (Additional merit pay for the 50/60 employees will be appropriated by the HR Department outside the Library operating budget.) The FY24 operating budget includes two full-time benefited positions which have been created by combining four existing part-time positions. The total number of FTEs is unchanged from FY23 and there is no budgeted overtime. In FY24, there will be 31.9 benefitted FTE and 5.8 non-benefitted FTE library employees. The addition of the two new benefited positions impacts the Library Expense budget by \$40,000 (\$20,000 per position) and this expense is likely to bring the operating budget out of guideline after the contract is settled and the Library Association increases are included.

The Materials Expenditure Requirement is a state stipulation for library certification which necessitates that 13% of the total tax-impact library budget be spent on library materials.<sup>2</sup> The state requirement ensures that all cities and towns fund their libraries at a minimum level and prevents municipalities underfunding their own libraries to take advantage of their neighbors'

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<sup>1</sup> Overdrive Advantage adds more copies of popular titles to the basic (tax-funded) Overdrive plan, decreasing wait times for e-books and audiobooks.

<sup>2</sup> Note that the 13% materials requirement means that every dollar added to the budget for either personal services or expenses requires an additional  $13/87 = \$0.15$  appropriation to be spent on materials.

services.<sup>3</sup> In FY24, Wellesley's materials budget exceeds 60% of the Library's operating expense budget.

The IT expense budget, comprising 24.6% of library expenses, is the other significant driver of non-personal services, with an increase of \$7,189 (4.3%) over FY23. The largest component of the IT expense budget is the \$85,725 (+3.3%) which covers Wellesley's membership in the Minuteman Library Network. IT expenses also include the local PC-based software as well as cloud-based and subscription services but not physical hardware like PCs, iMacs and servers which are included in the cash capital budget. Service contracts and non-capital hardware and software expenses account for the most significant increases in the FY24 IT budget. The service contract for maintenance of the library's self-check machines, credit card terminals, and RFID gates will no longer include discounts and prorated amounts applied by the vendor in prior years. Replacement of aging RFID equipment and barcode scanners not covered by service contracts are also projected to increase expenditures.

Administration expense increases include the \$40,000 fee for creating two full-time positions but the remainder of the administration expense budget is flat or negative; without the \$40,000 expense, this budget would decrease by 9%.

#### **FY24 Goals**

Goal A is to continue to meet all state requirements including 13% materials expenditures

Goal B is to maintain library services within budgetary limitations by reassessing and improving staffing, and to meet the needs of the community with a focus on Children's and Information Services

Goal C is to strengthen internet and electronic security by completing a cyber-security audit

Goal D is to continue to optimize operations for the newly-renovated facilities

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<sup>3</sup> Based on recommendations by the State Aid Review Committee, the Massachusetts Board of Library Commissioners has approved changes which eliminate municipally authorized revolving funds from the MAR calculation starting in FY19.

## Wellesley Free Library FY24 Operating Budget

	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	FY23-24 Change
Personal services*	\$1,947,332	\$1,980,774	\$2,052,446	\$2,210,207	\$2,238,157	1.26%
Expenses	569,248	624,113	648,019	671,627	717,201	6.49%
Total	<b>\$2,516,580</b>	<b>\$2,604,886</b>	<b>\$2,700,465</b>	<b>\$2,881,844</b>	<b>\$2,953,358</b>	<b>2.48%</b>

\*Includes a 3% increase for Series 40 and 2% COLA increase for Series 50 and 60 employees and 0% for the Staff Association

## Wellesley Free Library Five Year FTEs

Permanent Staffing (FTEs)	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Budget
Management	3.0	3.0	3.0	3.0	3.0
Supervisors	5.0	5.0	5.0	5.0	5.0
Librarians	8.4	8.4	8.4	8.6	9.1
Office Administration	1.9	1.9	1.9	1.9	1.9
Assistants	16.4	16.9	17.5	17.4	17.3
On Call/Pages	2.5	2.5	1.9	1.8	1.4
<b>Total Number of Positions</b>	<b>37.2</b>	<b>37.2</b>	<b>37.7</b>	<b>37.7</b>	<b>37.7</b>

Library Operating Request

Department: 610  
Department Head: Jamie Jurgensen, Library Director

DEPARTMENT EXPENDITURES	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24
Personal Services							
Salaries	\$ 1,940,857	\$ 1,974,674	\$ 2,047,221	\$ 2,204,882	\$ 2,232,607	\$ 27,725	1.26%
Longevity	6,475	6,100	5,225	5,325	5,550	\$ 225	4.23%
<b>Subtotal, Personal Services</b>	<b>1,947,332</b>	<b>1,980,774</b>	<b>2,052,446</b>	<b>2,210,207</b>	<b>2,238,157</b>	<b>\$ 27,950</b>	<b>1.26%</b>
Expenses	569,248	624,113	648,019	671,627	715,201	\$ 43,574	6.49%
<b>Subtotal, Expenses</b>	<b>569,248</b>	<b>624,113</b>	<b>648,019</b>	<b>671,627</b>	<b>715,201</b>	<b>\$ 43,574</b>	<b>6.49%</b>
<b>Subtotal, Benefit Penalty</b>						<b>40,000.00</b>	
						<b>2,993,358</b>	<b>3.87%</b>
<b>TOTAL</b>	<b>\$ 2,516,580</b>	<b>\$ 2,604,886</b>	<b>\$ 2,700,465</b>	<b>\$ 2,881,834</b>	<b>\$ 2,953,358</b>	<b>\$ 71,524</b>	<b>2.48%</b>

**Board of Library Trustees**

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**Library Operating Request**

Org	Object	Account # 01-610 Account Title	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24
<b>Personal Services</b>									
01610110	511140	Supervisor	\$ 124,466	\$ 134,648	\$ 141,388	\$ 132,932	\$ 132,423	\$ (509)	-0.38%
01610110	511420	Circulation Support Staff	368,545	381,746	407,966	429,333	431,172	\$ 1,839	0.43%
01610110	512010	Circulation Pages	16,536	7,623	4,849	28,710	28,860	\$ 150	0.52%
01610110	515050	Longevity	2,250	1,750	1,750	1,750	1,875	\$ 125	7.14%
01610120	511140	Children's Supervisor	70,914	78,314	81,982	79,584	79,279	\$ (305)	-0.38%
01610120	511160	Children's Librarian	166,022	157,371	170,073	196,348	219,844	\$ 23,497	11.97%
01610120	511420	Other Support Staff	25,760	22,755	23,121	27,509	27,425	\$ (84)	-0.31%
01610120	515050	Longevity	750	750	750	750	750	\$ -	0.00%
01610130	511140	Information Services Supervisor	74,552	76,496	78,031	79,584	79,279	\$ (305)	-0.38%
01610130	511160	Information Services Librarians	307,184	305,685	307,061	349,659	334,110	\$ (15,549)	-4.45%
01610130	511420	Information Services Support Staff	19,357	23,541	24,107	20,649	20,569	\$ (80)	-0.39%
01610130	515050	Information Services Longevity	1,725	1,850	1,850	1,950	2,050	\$ 100	5.13%
01610140	511140	Acquisitions and Cataloging Supervisor	68,922	73,518	79,120	79,584	79,279	\$ (305)	-0.38%
01610140	511420	Acquisitions and Cataloging Support Staff	230,095	216,670	205,382	210,220	210,232	\$ 12	0.01%
01610140	515050	Acquisitions and Cataloging Longevity	1,750	1,750	875	875	875	\$ -	0.00%
01610160	511160	Sunday Openings Librarian	15,909	18,709	22,111	30,173	30,175	\$ 2	0.01%
01610160	511420	Sunday Openings Support Staff	19,024	13,661	16,234	26,855	26,857	\$ 3	0.01%
01610180	511010	Administration Director	212,544	226,428	221,198	226,400	230,042	\$ 3,642	1.61%
01610180	511320	Administration Secretary	47,111	41,817	51,282	50,441	54,081	\$ 3,640	7.22%
01610180	511420	Administration Support Staff	46,077	49,727	49,944	53,384	54,665	\$ 1,281	2.40%
01610180	514010	Administration Shift Diff	5,068	4,493	4,886	6,000	6,000	\$ -	0.00%
01610185	511010	Senior Administrators- IT Director	83,182	85,794	81,915	84,782	86,146	\$ 1,364	1.61%
01610185	511420	Other Support Staff	39,592	55,676	76,571	92,737	102,169	\$ 9,432	10.17%
		<b>Personal Services Subtotal</b>	<b>1,947,332</b>	<b>1,980,774</b>	<b>2,052,446</b>	<b>2,210,207</b>	<b>2,238,157</b>	<b>\$ 27,950</b>	<b>1.26%</b>
<b>Expenses</b>									
01610220	555010	Children's Bound Books	92,548	122,960	117,457	126,500	114,825	\$ (11,675)	-9.23%
01610220	555020	Children's Periodicals/Newsprs	665	764	780	900	850	\$ (50)	-5.56%
01610220	555040	Compact Disks	159	100	282	300	300	\$ -	0.00%
01610220	555050	Children's Audio Tapes	23,683	13,945	19,086	17,000	14,500	\$ (2,500)	-14.71%
01610220	555080	Children's Reference	3,570	3,825	3,630	4,000	4,000	\$ -	0.00%
01610220	555070	Video Media	15,633	14,197	6,325	6,900	11,900	\$ 5,000	72.46%
01610220	555260	Library of Things-Juvenile	2,220	1,695	2,965	3,000	3,000	\$ -	0.00%
01610230	555010	Reference Bound Books	105,190	136,336	160,292	165,219	175,684	\$ 10,465	6.33%
01610230	555020	Reference Periodicals/Newspr	15,916	15,604	8,014	8,500	15,850	\$ 7,350	86.47%
01610230	555030	Reference Microforms/Microfilm	330	311	267	350	350	\$ -	0.00%
01610230	555040	Reference Compact Discs	1,145	763	936	750	1,000	\$ 250	33.33%
01610230	555050	Reference Audio Tapes	48,463	26,250	26,564	23,500	15,850	\$ (7,650)	-32.55%
01610230	555080	Reference	9,883	5,019	2,110	-	5,200	\$ 5,200	0.00%
01610230	555070	Reference Video Media	27,307	24,703	24,530	27,000	26,800	\$ (200)	-0.74%
01610230	555080	Reference Standing Orders	42,359	38,985	40,571	41,000	40,000	\$ (1,000)	-2.44%
01610230	555090	Business Reference	6,508	6,841	7,239	7,500	7,000	\$ (500)	-6.67%
01610230	555250	Library of Things-Adult	2,032	3,705	4,696	5,000	4,000	\$ (1,000)	-20.00%
01610240	555130	Acquisitions & Cataloging Supp	13,000	13,000	12,656	13,000	10,000	\$ (3,000)	-23.08%
01610280	524030	Administration Equipmt Maint	-	-	500	500	500	\$ -	0.00%
01610280	534010	Administration Postage	2,311	1,060	1,405	3,000	3,000	\$ -	0.00%

Board of Library Trustees

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534020	Administration Telephone	-	58	-	-	-	\$ -	0.00%
542010	Administration Office Supplies	10,948	11,528	13,282	9,200	9,200	\$ -	0.00%
555190	Administration Other Supplies	5,239	5,670	6,007	6,719	6,719	\$ -	0.00%
571010	Administration Travel Mileage	65	-	573	200	200	\$ -	0.00%
571110	Administration Conf/Mtgs	-	3,300	5,303	7,000	7,000	\$ -	0.00%
571120	Administration Conf/Mtgs Staff	3,522	374	2,475	2,500	2,500	\$ -	0.00%
573090	Administration Dues-Other	750	750	750	750	750	\$ -	0.00%
578090	Administration Unclass Expense	-	-	-	500	40,500	\$ 40,000	8000.00%
583020	Office Machines/Equipment	-	-	-	2,000	2,000	\$ -	0.00%
595535	Delivery Fee	1,000	750	500	1,000	1,000	\$ -	0.00%
583110	Furniture Replacement	-	20,667	12,990	15,000	10,695	\$ (4,305)	-28.70%
524030	Equipment(Computer) Maintenance	21,244	20,075	30,591	29,124	33,123	\$ 3,999	13.73%
524050	Computer Equipment Maintenance	7,952	28,227	12,964	11,629	12,327	\$ 698	6.00%
530400	Network & Information Services	78,724	77,565	78,801	82,969	85,725	\$ 2,756	3.32%
530410	Network&Information-Website	7,350	3,850	8,100	4,285	-	\$ (4,285)	-100.00%
530420	Network&Information-Software	10,332	11,215	23,459	34,153	-	\$ (34,153)	-100.00%
534055	Cable and Internet	3,948	5,274	5,269	6,704	7,039	\$ 335	5.00%
530800	Computer software serives	-	-	-	-	37,838	\$ 37,838	0.00%
521020	Natural Gas	-	-	982	-	-	\$ -	0.00%
524020	Maintenance Vehicle Maint	2,133	480	1,413	200	200	\$ -	0.00%
524031	Maintenance - Paint	-	-	3,090	-	-	\$ -	0.00%
524033	Maintenance - Carpet	2,000	-	-	-	-	\$ -	0.00%
524033	Maintenance - Windows	-	-	-	-	-	\$ -	0.00%
541010	Gasoline	265	161	239	600	600	\$ -	0.00%
543010	Maintenance Building Supplies	-	3,100	-	-	-	\$ -	0.00%
543060	Maintenance Custodial Supplies	855	1,005	925	3,175	3,175	\$ -	0.00%
<b>Expenses Subtotal</b>		<b>569,248</b>	<b>624,113</b>	<b>648,019</b>	<b>671,627</b>	<b>715,201</b>	<b>43,574</b>	<b>6.49%</b>
<b>DEPARTMENT TOTAL</b>		<b>2,516,580</b>	<b>2,604,886</b>	<b>2,700,465</b>	<b>2,881,834</b>	<b>2,953,358</b>	<b>71,524</b>	<b>2.48%</b>