Proposed Fiscal Year 2014 Town Library Budget

January 4, 2013

Prepared by:

Sharon A. Sharry, Library Director
Austin Sarat, President, Board of Trustees
Chris Hoffmann, Vice President
Tamson Ely, Secretary
Carl Erikson, Treasurer
Robert Pam, Vice Treasurer
Michael Wolff
January 4, 2013

TO: Town of Amherst Finance Committee
Town of Amherst Selectboard
John Musante, Town Manager
Sandy Pooler, Finance Director

FROM: Sharon A. Sharry, Library Director
SharryS@JonesLibrary.org

RE: Proposed FY2014 Town Library Budget

On behalf of the Trustees of The Jones Library, Inc., I submit to you
the proposed FY2014 Town Library Budget.

Enclosed, please find the following:
- Vision Statement/Mission Statement/Long Range Goals/
  Key Objectives
- Accomplishments/Challenges
- Value of The Jones Library, Inc.
- Comparison Graphs of Circulated Materials
- Jones Library FY14 Budget Summary
- Organizational Chart
- Impacts of a 3% Increase
- FY2014 Budget Concerns
- Relationships With Other Town Departments

I look forward to meeting with you and answering any questions you
may have.

Thank you for your time and consideration.
VISION STATEMENT

We believe in the freedom to read, learn, discover, and change lives.

MISSION STATEMENT

We serve and inspire people of all ages by providing multi-cultural resources for lifelong learning. We welcome everyone to our historic buildings. We celebrate Amherst history and literary heritage, including local poets Emily Dickinson and Robert Frost.

LONG RANGE GOALS

- Goal I. Create a welcoming and safe environment where all members of the community connect.
- Goal II. Provide public access to the widest possible array of materials and learning opportunities.
- Goal III. Promote innovative, community-tailored technological resources.
- Goal IV. Develop a friendly, skilled staff committed to serving the regions’ diverse population.
- Goal V. Enhance communication, dialogue, and partnerships within the community.
- Goal VI. Expand funding sources and reduce operating costs without affecting services.

ONGOING KEY OBJECTIVES

- Develop a plan to use Library space to accommodate present and future needs; implement as funding permits.
- Propose to the Town an Assistant Library Director position which has development responsibilities.
- Increase and restore the Library’s open hours schedule for service to the public.
- Increase the amount of money coming from Library resources for circulating materials.
- Provide opportunities for technological assistance and training for the public.
- Expand public access to electronic and digital materials.
- Enhance customer service at all Library locations.
- Design a feedback mechanism to monitor changing community needs.
- Seek new public and private partnerships that will expand the Library’s budget.
- Evaluate new technologies and software to enable reduced operating costs, greater efficiency, new revenue streams, and more efficient fundraising and sales.
RECENT ACCOMPLISHMENTS

• Personnel.
  o For over one year while the Adult Services position was vacant, several staff members took on an intense load of extra duties at The Jones as well as at the branches. (Editor’s note: we have hired a new Head of Collections, Technical Services Assistant, and Circulation Assistant as well as upgraded the Head of Programming and Outreach position.)

• Programming.
  o The Jones Library’s first-ever book discussion group met monthly.
  o “Sisters in Crime” awarded $1,000 to The Jones as part of their “I Love libraries” campaign.
  o We hosted a series of monthly sings.
  o Many youth programs continued including Sing With Your Baby, The Children’s Music Series, the Chess Club, an American Girl Party and a Spanish Story Time.
  o Munson Memorial staff prepared 180 Summer Reading Club packets, featuring details from the Reading Clubs of all three Amherst libraries, which were presented to Crocker Farm Elementary students during their class time.
  o Munson Memorial staff represented The Jones Library at the Crocker Farm open house.
  o The beautiful North Amherst Branch Library garden, maintained by a group of volunteers, appeared as a stop on the Amherst Garden Tour.
  o Every Monday, the North Amherst Branch is visited by two Headstart classrooms.
  o The Jones participated in several community events including “World book Night,” the Amherst Educational Foundation’s “Trivia Bee,” and “Kids’ Day at the Mullins Center.”
  o Seven English as a Second Language (ESL) students who had been tutored at The Jones were granted citizenship.
  o The ESL program received a $5,000 grant from the Xeric Foundation in support of designated students for citizenship and driver’s license work.
  o Organized and implemented Jones Library participation in the Massachusetts Board of Library Commissioner’s (MBLC) Snapshot Day.
  o Hosted a free concert by the Bay State Winds, the clarinet trio of the Air Force Band of Liberty.
  o Hosted several tours of The Jones for several community groups including the Pioneer Valley Chinese Immersion Charter School, the Montessori School and Round the World Women.
  o The Library and its Trustees are excited to be a member of the Business Improvement District.

• The Buildings.
  o The foundation of the North Amherst Branch Library has been repaired.
  o The Friends of The Jones Library System approved using Woodbury funds to renovate the Large Meeting Room and rename it the Woodbury Room.
  o Completion of a new HVAC system for Special Collections.
- Instituted new safety procedures (incident reporting, trespassing and closing procedures) to improve and maintain the safety of our Library buildings.

- Technology.
  - Launched an E-Reader Lending Program at The Jones. Over 125 patrons have experienced using an E-Reader thanks to this program, and now know if they are interested in owning one.
  - The Jones Library, Inc. migrated to a new open source integrated library system called Evergreen. Benefits to using the new software include: significantly lower total cost for managing and operating the system; one search interface for both western and central regions; greater flexibility in the design and customization of the catalog; and greater ability to add additional services to the catalog such as further integration with services like Overdrive for eBooks.

- Special Collections.
  - Initiated restoration work on Library paintings as part of an Amherst Community Preservation Act grant.
  - Engaged three Smith College student interns to process materials including the Amherst Writers and Artists Collection, the Ray Stannard Baker Collections and the Civil War Collection.
  - Built solid relationships with the Five Colleges by hosting students from Smith College.

### CURRENT CHALLENGES

- The Buildings.
  - Too many unsupervised nooks and crannies provide a high level of safety and security issues.
  - The children's room of The Jones is not large enough to house its collection (the collection is located on three different floors of the Library), nor technology (there is not enough room to house the number of computers necessary to meet the demand of the youth). Patrons and staff have to vie for space because the Children's Librarian's desk is located in "prime real estate."
  - The entrance to the children's Room of The Jones is almost hidden.
  - The Jones needs a separate teen/young adult space.
  - The Jones' adult circulation desk is confusing because there are three service points and it is hard to recognize as the service desk.
  - Due to poor architectural design, patrons are not greeted upon entering The Jones Library. Consequently, patrons are unsure of which staircase/elevator to take to get to the upper floors.
  - The Audio Visual Office needs to be located next to the circulation desk.
  - Inadequate signage at The Jones often frustrates patrons.
  - The Jones is in need of new HVAC software because there are environmental issues, such as too hot or too cold, throughout the building.
  - We need more space at The Jones to receive our daily Massachusetts Library System InterLibrary Loan deliveries.
  - The InterLibrary Loan Office is not climate controlled and there is not enough space for the delivery bins to be stored at waist-level height.
Insufficient space at The Jones for group ESL tutoring sessions.
- The Amherst Room of The Jones needs renovation and installation of up-to-date technology.
- Patrons have trouble locating the public restrooms, which are located on the lower level.
- Patrons have trouble locating Special Collections.
- Special Collections lacks sufficient storage space at The Jones for new manuscripts and other additions.
- Patrons have trouble finding their way out of the building once they are at Special Collections/the Burnett Gallery.
- There is no place set aside for consumption of food and drink at The Jones.
- Most of the carpeting at The Jones needs to be replaced.
- The top floor office spaces are used inefficiently.
- Insufficient parking at The Jones.
- The North Amherst Library Branch is not handicapped accessible.
- The North Amherst Library Branch does not have a public bathroom.

Funding.
- The Jones Library remains closed on Monday mornings due to budget cuts. (This also affects the number of evening programs the Library can offer.)
- The North Branch remains closed on Thursdays due to budget cuts.
- The Munson Memorial Branch remains closed on Fridays due to budget cuts.
- The shrinking Endowment provides fewer operational funds.
- Shrinking State Aid funds require that the Town pay more towards salaries.

Personnel.
- Several key positions have been vacant for long periods of time.
- Insufficient funds for staff development.
- Lack of funds for a Volunteer Coordinator.
- Lack of funds for an Assistant Library Director.
- Lack of funds for additional building maintenance hours.
- Lack of funds for another Information Technology person.

Programming.
- Insufficient funds for youth, teen, adult and senior programming.

Technology.
- The website needs to be professionally updated.
- Staff continue to work with Evergreen, including the need to keep staff and patrons informed of updates and search tips as well as documenting bugs and proposing solutions.
- Lack of technical support for the Special Collections’ Digital Amherst website.
The Value of The Jones Library, Inc. Services, Programs and Materials Provided in Fiscal Year 2012 was:

**Over $7.5 Million**

<table>
<thead>
<tr>
<th>Quantity of Use</th>
<th>Library Service</th>
<th>Value of Service Per Item</th>
<th>Based On</th>
<th>Total Saved</th>
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<td>174,458</td>
<td>Adult Books Borrowed</td>
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<td>42,664</td>
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<td>52,000</td>
<td>Computer Usage</td>
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<td>FedEx/Kinko's price per hour</td>
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<td>5,113</td>
<td>Adult/Teen Programs Attended</td>
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<td>4,434</td>
<td>Youth Programs Attended</td>
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<td>32,264</td>
<td>Reference Questions Answered</td>
<td>$7.00</td>
<td>Average library cost</td>
<td>$225,848</td>
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</table>

**TOTAL VALUE OF SERVICES:**  $7,755,345

In Fiscal Year 2012, the Town of Amherst appropriated $1,644,736 for The Jones Library, Inc.

In return, The Jones Library, Inc. delivered over $7.5 million worth of services to the residents of Amherst and the surrounding towns.

If you would like to see how much you personally save by using The Jones Library, please go to [http://www.joneslibrary.org/budget/libraryvalue.html](http://www.joneslibrary.org/budget/libraryvalue.html)
These charts illustrate that The Jones is accomplishing a great deal of work, thus it is imperative to maintain staffing levels.
# Jones Library FY14 Budget Summary

<table>
<thead>
<tr>
<th></th>
<th>FY 09</th>
<th>FY 10</th>
<th>FY 11</th>
<th>FY 12</th>
<th>FY 13</th>
<th>FY14</th>
<th>Change FY 14-13</th>
<th>Percent Change</th>
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<tr>
<td>Personnel Services</td>
<td>$ 1,340,263</td>
<td>$ 1,385,560</td>
<td>$ 1,367,861</td>
<td>$ 1,431,896</td>
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<td>$ 1,465,230</td>
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<td>Employee Benefits</td>
<td>$ 252,276</td>
<td>$ 245,981</td>
<td>$ 245,981</td>
<td>$ 253,445</td>
<td>$ 253,445</td>
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<td>$ 284,796</td>
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<td>Circulating Materials</td>
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<td>$ 167,300</td>
<td>$ 172,824</td>
<td>$ 173,800</td>
<td>$ 186,211</td>
<td>$ 173,300</td>
<td>$ 187,105</td>
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<td>Operations</td>
<td>$ 233,046</td>
<td>$ 302,565</td>
<td>$ 279,796</td>
<td>$ 322,276</td>
<td>$ 411,302</td>
<td>$ 316,926</td>
<td>$ 285,059</td>
<td>$ 402,541</td>
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<td><strong>TOTAL</strong></td>
<td>$ 2,121,480</td>
<td>$ 2,101,406</td>
<td>$ 2,066,462</td>
<td>$ 2,181,417</td>
<td>$ 2,276,854</td>
<td>$ 2,192,736</td>
<td>$ 2,106,963</td>
<td>$ 2,272,830</td>
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### SOURCE OF FUNDS

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<th>FY 09</th>
<th>FY 10</th>
<th>FY 11</th>
<th>FY 12</th>
<th>FY 13</th>
<th>FY14</th>
<th>Change FY 14-13</th>
<th>Percent Change</th>
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<tr>
<td>Town Appropriation</td>
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<td>$ 1,685,841</td>
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<td>Library State Aid</td>
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<td>$ 85,229</td>
<td>$ 53,229</td>
<td>$ 101,451</td>
<td>$ 67,330</td>
<td>$ 63,865</td>
<td>$ 63,000</td>
<td>$ 83,000</td>
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<td>Jones Library, Inc. Endowment</td>
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<td>$ 390,961</td>
<td>$ 430,230</td>
<td>$ 430,229</td>
<td>$ 412,000</td>
<td>$ 404,436</td>
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<td>Woodbury Funds</td>
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<td>Building Expansion and Renovation</td>
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<td>Special Collections</td>
<td>2,001</td>
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<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>-</td>
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<td>Annual Fund Drive and Lost Books</td>
<td>$ 53,700</td>
<td>$ 53,000</td>
<td>$ 58,075</td>
<td>$ 60,000</td>
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<td>-</td>
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<td>Replacements/Lost Books</td>
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<td>Jones Friends’ Donation (Books)</td>
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<td>Gift, Grants, Reserves, Etc.</td>
<td>$ 17,350</td>
<td>$ 32,822</td>
<td>$ 41,240</td>
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<td>$ 35,945</td>
<td>$ 6,000</td>
<td>$ 8,566</td>
<td>$ 40,000</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$ 2,143,347</td>
<td>$ 2,101,406</td>
<td>$ 2,065,536</td>
<td>$ 2,181,417</td>
<td>$ 2,276,854</td>
<td>$ 2,191,601</td>
<td>$ 2,106,963</td>
<td>$ 2,272,830</td>
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### POSITIONS

<table>
<thead>
<tr>
<th></th>
<th>FY 09</th>
<th>FY 10</th>
<th>FY 11</th>
<th>FY 12</th>
<th>FY 13</th>
<th>FY14</th>
<th>Change FY 14-13</th>
<th>Percent Change</th>
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<td>Full Time</td>
<td>16</td>
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<td>Part Time with Benefits</td>
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<td>Full Time Equivalents</td>
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<td>Part Time with no Benefits</td>
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Endowment Spend Rate

5.40%

plus $10,000
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<tr>
<th>Category</th>
<th>FY12 Expenses</th>
<th>FY12 Sources</th>
<th>FY13 Expenses</th>
<th>FY13 Sources</th>
<th>FY14 Expenses</th>
<th>FY14 Sources</th>
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<td>Personnel Services</td>
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<td>Circulating</td>
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<td>Materials</td>
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<td>TOTALS</td>
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<td><strong>$2,272,830.00</strong></td>
<td></td>
<td><strong>$2,339,757.00</strong></td>
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</table>
LIMITATIONS OF A 3% INCREASE

- Less money for temporary, fill-in staff who are used regularly to staff the circulation desks as well as when permanent staff use sick, vacation and personal time.
- Monday morning open hours at the Main Library will not be restored, despite increased open hours being the number one patron request.
- Meeting room space on Monday mornings will not be restored at The Jones.
- Thursday open hours will not be restored at the North Amherst Branch.
- Friday open hours will not be restored at the Munson Memorial Library.
- Insufficient maintenance staff coverage, whose responsibility for cleaning 67,600 square feet at the Main Library (including four public bathrooms, three staff bathrooms, and three public meeting rooms) and 1,500 square feet at the North Amherst Branch (including one staff bathroom). Maintenance Staff are also responsible for exterior maintenance as well as daily deliveries between the three Library buildings.
- Special Collections is only open half-time on Saturdays and not at all on Sundays (i.e., missing tourist traffic as well as families and working people).
- Retains a $75,000 per year cut to books and materials budget (i.e., 5,000 fewer books, music CD's and DVD's will be purchased).
- The Municipal Appropriation Requirement (MAR), which applies only to the Town's appropriation to the Library, will be met, however tightening will have to continue.

IMPACT OF FUNDING ABOVE A 3% INCREASE

- Ability to increase temporary, part-time staff to permanent full-time status in the form of a Volunteer Coordinator, an Assistant Library Director and additional Circulation Assistants.
- MORE OPEN HOURS.
- MORE PROGRAMS.
- MORE BOOKS, DVD'S, MAGAZINES, MUSIC CD'S, ETC.
Anticipated Outside Funding Sources

In order to receive a full State Aid award, The Jones Library, Inc. must spend 13% of its municipal appropriation (minus fringe benefits) on circulating materials. To meet this requirement, the Library must supplement the Town’s appropriation with funds from several other sources. The breakdown for FY13 and FY14 is as follows:

<table>
<thead>
<tr>
<th>Account</th>
<th>FY13 Amount to Spend</th>
<th>FY14 Amount to Spend</th>
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<tr>
<td>Endowment</td>
<td>$138,191</td>
<td>$114,534</td>
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<td>Annual Fund Drive</td>
<td>$ 17,500</td>
<td>$ 37,500</td>
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<td>Friends</td>
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<td>$ 15,000</td>
</tr>
<tr>
<td>Gifts, Grants, etc.</td>
<td>$ 15,309</td>
<td>$ 24,966</td>
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<td><strong>TOTAL:</strong></td>
<td><strong>$186,000</strong></td>
<td><strong>$192,000</strong></td>
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</table>

Comments:

1. Endowment money available for expenditure varies from year to year. In the past four years, the Endowment has depreciated by $2.5 million due to the vagaries of the market and the high endowment draw rates. Decreasing the Endowment principal limits the amount of money available for Library operations. In FY10, $416,699 was withdrawn; in FY14, only $372,779 will be available (a difference of $43,920). The Trustees of The Jones Library, Inc. have worked to develop a sound management strategy for the Endowment because the Library’s Investment Managers advise a spending rate of no more than 4% per year to assure the Endowment’s viability in perpetuity. In FY14, the Library will, however, spend 5%, with 4% being the goal by FY16.

2. The Library is collecting far less from its Annual Fund Drive than in past years. For FY10, $53,000 was raised; for FY13, only $44,000 was raised (a difference of $9,000).

3. The Library relies heavily on funds from the Friends of the Library. On the whole, donations from the Friends provide programs requested by staff. However, restricted donations such as the “Beds for Books” funds, which total approximately $8,000 annually, must be used for books.

*Anticipated funds are based on historical amounts.*
*Any or all funds may not meet anticipated levels.*
SERVICES PROVIDED BY THE JONES LIBRARY, INC.

- The Library actively advertises and promotes LSSE Camp programs in the lobby and sells tickets to LSSE musicals.
- The Children’s Room co-sponsors the teen improve group, ACTSMART, which uses drama to address relevant teen issues such as bullying, peer pressure and social and emotional issues.
- Through the “Every Child a Reader” program, two hundred and fifty second graders from the Amherst and Pelham schools visit The Jones to receive a Library card, a free book donated by the Friends of the Library, a tour of The Jones, a story time, and an Emily Dickinson poem.
- The Library hosts information tables at community events including the Schools’ First Day Celebration and Latino Night Celebration.
- The Reference Department provides access to Town reports and other documents made available for public review.
- The Reference Department assists the schools in the selection of textbooks by making potential selections available for public review and comment.
- The Reference Department provides voter registration forms.
- The Reference Department is available to assist Town Departments and officials with research projects.
- The Library supports Town-wide surveys (e.g., Waste and Recycling Survey) by providing print copies to residents upon request and by assisting residents in completing online surveys.
- The Library’s ESL Department works with the Cambodian Social Services Coordinator in sharing naturalization information to ensure that elderly disabled refugees can become citizens.
- The Library’s ESL Department works with the ESL Department at the High School to make sure families have access to services.
- The Library helps to promote Health Department seasonal information such as encouraging residents to get flu shots.
- The Library collaborates with the Kanegasaki Sister City Committee, for example the Special Collections Department participated in the tenth anniversary celebration of the Emily Dickinson Archive Center, located in Kanegasaki, Japan.
- The Special Collections staff provides support to Amherst High School students, as they conduct research on Amherst buildings, as part of a long standing cooperative effort.
- The Library provides meeting room space to other town departments.
- As the Munson Memorial Library building is the voting location for precinct 8, Library staff are able to help the Town Clerk’s office during elections.
- Munson Memorial staff provide security for the building and inform the Town’s Facilities Supervisor of maintenance issues.
- The Jones Library, Inc. also collaborates annually with Amherst College and the Frost Library, Amherst Community Connections, Business Improvement District, Chamber of Commerce, Cultural Council, Emily Dickinson Museum, Garden Club, Historical Society,
League of Women Voters, Public Arts Council, Survival Center, Sustainability Committee, and the University of Massachusetts and the UMass Library.

**Services Received by The Jones Library, Inc.**

- The Town funds the majority of the Library’s personnel costs.
- The DPW provides lawn and snow-removal service for the North Amherst branch. They also perform some general maintenance on the Library’s van and assist with tree-trimming and removal.
- The DPW provides lawn and snow-removal service for the Munson Memorial Library branch.
- The Fire and Police Departments play an active role in helping to keep the Library safe. We interact regularly with the police for their help in dealing with problem patrons. The Fire Department has always been helpful in answering inquiries about various building and fire codes.
- The Town maintains the building and grounds for the Munson Memorial Library.
- The IT Department works very closely with the Library overseeing its technological needs, both current and future.
- The Accounting Department provides the Library with MUNIS accounting reports as well as generating payroll and other accounting support services.
- The Human Resources Department provides the Library with support services.
- The Community Preservation Act Committee provides financial support to the Library’s Special Collections department.