

**MONROE COUNTY PUBLIC LIBRARY
BOARD OF TRUSTEES**

**WORK SESSION
Wednesday, August 08, 2012
5:45 p.m.
Meeting Room 1B**

AGENDA

1. Call to Order – Kari Isaacson, President
2. Authorization to Appeal for an Increase to the Maximum Levy, resulting from County Auditor Error in 2012 (page 1-6) – Gary Lettelleir
3. 2013 Budget (revised) (page 7-25) – Gary Lettelleir
4. Internet and Computer Use Policy (page 26-34) – Josh Wolf , Steve Backs and Ned Baugh
5. Public Comment
6. Adjournment

PETITION TO APPEAL FOR AN INCREASE TO THE MAXIMUM LEVY

The _____ **Board of Trustees** _____ of the **Monroe County Public Library** _____,
(Fiscal/Governing Body) (Taxing Unit)

___**Monroe**_____ County, State of Indiana, has determined to file for an excess levy appeal.

(Please check the appropriate excess levy appeal(s) and provide the dollar amount(s) requested:

- | | |
|---|------------------------|
| <input type="checkbox"/> Annexation (IC 6-1.1-18.5-13(1)) | \$ _____ |
| <input type="checkbox"/> Three Year Growth (IC 6-1.1-18.5-13(3)) | \$ _____ |
| <input type="checkbox"/> Emergency Levy Appeal (C-1.1-18.5-13(13)) | \$ _____ |
| <input checked="" type="checkbox"/> Property Tax Shortfall (IC 6-1.1-18.5-16) | \$ <u>42,975</u> _____ |
| <input type="checkbox"/> Correction of Error (IC 6-1.1-18.5-14) | \$ _____ |

The fiscal/governing body of **Monroe County Public Library, Monroe** County hereby resolves to proceed with a petition for an excess levy to the Department of Local Government Finance to increase the taxing unit's maximum levy.

Adopted this 19th day of September, 2012.

FOR

AGAINST

ATTEST: _____

FindLaw[®] FOR LEGAL PROFESSIONALS

Ind. Code § 6-1.1-18.5-16 : Indiana Code - Section 6-1.1-18.5-16: Civil taxing unit appeal to department of local government finance for relief from levy limits related to revenue shortfall related to erroneous assessed valuation

Search Ind. Code § 6-1.1-18.5-16 : Indiana Code - Section 6-1.1-18.5-16: Civil taxing unit appeal to department of local government finance for relief from levy limits related to revenue shortfall related to erroneous assessed valuation

- [Search by Keyword or Citation](#)

- (a) A civil taxing unit may request permission from the department to impose an ad valorem property tax levy that exceeds the limits imposed by section 3 of this chapter if:
- (1) the civil taxing unit experienced a property tax revenue shortfall that resulted from erroneous assessed valuation figures being provided to the civil taxing unit;
 - (2) the erroneous assessed valuation figures were used by the civil taxing unit in determining its total property tax rate; and
 - (3) the error in the assessed valuation figures was found after the civil taxing unit's property tax levy resulting from that total rate was finally approved by the department of local government finance.
- (b) A civil taxing unit may request permission from the department to impose an ad valorem property tax levy that exceeds the limits imposed by section 3 of this chapter if the civil taxing unit experienced a property tax revenue shortfall because of the payment of refunds that resulted from appeals under this article and IC 6-1.5.
- (c) If the department determines that a shortfall described in subsection (a) or (b) has occurred, the department of local government finance may find that the civil taxing unit should be allowed to impose a property tax levy exceeding the limit imposed by section 3 of this chapter. However, the maximum amount by which the civil taxing unit's levy may be increased over the limits imposed by section 3 of this chapter equals the remainder of the civil taxing unit's property tax levy for the particular calendar year as finally approved by the department of local government finance minus the actual property tax levy collected by the civil taxing unit for that particular calendar year.
- (d) Any property taxes collected by a civil taxing unit over the

limits imposed by section 3 of this chapter under the authority of this section may not be treated as a part of the civil taxing unit's maximum permissible ad valorem property tax levy for purposes of determining its maximum permissible ad valorem property tax levy for future years.

(e) If the department of local government finance authorizes an excess tax levy under this section, it shall take appropriate steps to insure that the proceeds are first used to repay any loan made to the civil taxing unit for the purpose of meeting its current expenses.

As added by P.L.73-1983, SEC.1. Amended by P.L.90-2002, SEC.171; P.L.1-2004, SEC.23 and P.L.23-2004, SEC.25; P.L.224-2007, SEC.30; P.L.146-2008, SEC.184; P.L.182-2009(ss), SEC.136.

[« Prev](#)

Department of
local government
finance correction
of certain levy
and rate errors

reserved.

[Up](#)

CIVIL
GOVERNMENT
PROPERTY TAX
CONTROLS

[Next »](#)

Civil taxing unit
levy excess fund;

Copyright © 2012 FindLaw, use of fund
a Thomson Reuters business. All rights

HeraldTimesOnline.com

Monroe auditor's office error costs local governmental units \$990,827

Problem figuring tax bills means Monroe County's taxing units will lose almost \$1 million

By Dawn Hewitt
April 19, 2012

331-4377 | dhewitt@heraldt.com

A mistake in calculating Monroe County property tax bills will mean a combined revenue loss of \$990,827 to Monroe County schools, the public library, the city of Bloomington, county government, townships and other taxing units.

Beleaguered county Auditor Amy Gerstman claims full responsibility for the error, although she said it was one of her employees who overlooked two parts of a spreadsheet used to calculate tax bills for all property owners in the county.

"We are in contact with the Department of Local Government Finance as to how to resolve this," Gerstman said via email. "The error did happen in my office with one of my deputies, I am responsible for it. We will decide as an office this week as to how to avoid this problem going forward."

She called the mistake "human error."

According to county Treasurer Cathy Smith, 257 tax-exempt entities, such as educational, religious or charity organizations, were erroneously sent bills for personal property taxes.

Tax bills for tax-exempt entities outside of Bloomington or Ellettsville town limits should reflect a newly imposed stormwater fee, but not taxes on medical or factory equipment, heavy machinery or other such personal property.

IU Health Bloomington Hospital received the biggest incorrect tax bill: for \$561,428 on an assessed value of \$28.95 million.

They won't have to pay that bill. New tax bills for all 257 affected parties are being prepared.

"It's confusing to taxpayers. We don't want to send them more than one tax bill," said Hans Huffman, Smith's chief deputy.

Property taxes are calculated on the total assessed value of all property in the county, and the assessed value of tax-exempt entities shouldn't have been included, but it was. That means that all the other property taxpayers in Monroe County got bills lower than they should have by \$990,827.

That amount is not recoverable, at least, not this year.

“The only thing we can do is appeal and collect the money next year,” Gerstman said via telephone. “We’ll start the appeal process next week.”

Overall, the lost income is about one percent of the expected tax revenue for all the taxing units in the county, Smith estimated. But the percentage of income lost will vary greatly from taxing unit to taxing unit, depending on which erroneously billed nonprofits are located within their taxing district.

For this year, Bloomington city government will receive \$377,930 less than the Indiana Department of Local Government Finance approved for it from property tax collections; Monroe County Community School Corp. will get \$338,055 less; Monroe County government will get \$178,558 less, and Monroe County Public Library \$42,975 less. Others affected include the Monroe County Solid Waste Management District, Ellettsville, Stinesville, Perry-Clear Creek Firefighters and the county’s 11 townships.

“This is so sickening,” county Assessor Judy Sharp said at a meeting Wednesday morning at The Herald-Times. Also present at the meeting were Sharp’s chief deputy, Lisa Surface, Smith and Huffman. Gerstman was invited to the meeting, but declined.

Sharp said her office staff was at work calling all 257 affected tax-exempt property owners, apologizing on behalf of the county for their unexpected tax bills, and telling them that corrected, lower tax bills will soon be sent to them.

“Frankly, the auditor’s office should have done it, but I’m not going to trust them to do it,” Sharp said.

Assessed values for county property originate in the assessor’s office, then are sent to the auditor’s office where the tax rates are calculated with input from the state DLGF. The treasurer’s office prints and mails the bills and collects payments.

“The auditor gives the treasurer big files. We generate the bills from their files,” Smith said.

“I gave them the option to check (reports on the bills), but the auditor’s office said they were not willing to do that,” Smith said. She said the check would have taken 10 minutes.

“They didn’t want to double check. That might have caught it,” she said.

Surface said she was surprised the DLGF didn’t catch the error, although noticing an overstatement of \$50 million (the erroneously included tax-exempt property) among \$9 billion in total assessed value for the county might not jump out.

“There were no red flags from the state,” Gerstman said later via telephone. “... We rely heavily on the state, and they missed it as well.”

Gerstman is not running for reelection.

Smith said that collaboration among the assessor, auditor and treasurer is essential to avoiding errors, and that isn’t happening in Monroe County right now.

“Whoever becomes auditor, this is an opportunity to become collaborative with all three of us,” Smith said.

Huffman is running to become the Democratic candidate for auditor in the primary election, as is Steve Saulter, first financial officer in Gerstman's office.

Revenue loss, by taxing unit

The top five taxing units affected by the Monroe County Auditor's Office's **\$990,827** property tax bill calculation error and the amount of tax revenue they will lose this year:

City of Bloomington: **\$377,930.**

Monroe County Community School Corp.: **\$338,055.**

Monroe County government: **\$178,558.**

Monroe County Public Library: **\$42,975.**

Monroe County Solid Waste Management District: **\$12,903.**

The remaining **\$40,406** in lost tax revenue is split among Stinesville, Ellettsville, Perry-Clear Creek Firefighters and the county's 11 townships.



Amy Gerstman, Monroe County auditor. Courtesy photo

Copyright: HeraldTimesOnline.com 2012

Monroe County Public Library 2013 Budget

The third draft of the 2013 budget reflects the following updates from the previous draft:

- Increase Information Services consulting fees expense – \$5,000
- Decrease Transfer to LIRF - \$5,000

The operating fund spending total (\$7,798,983) did not change.

The current year assessed valuation is about \$6.26 billion. According to a recent Herald Times article, “the gross assessed value of the county grew by about \$500 million”. That would be an increase of about 8% to put the total A.V. for 2013 at about \$6.75 billion. The good news for the library and other government units is that the A.V. increase will have a positive effect on the circuit breaker credit.

The proposed Notice to Taxpayers is included as the second page in this report. If it is approved at next week’s board meeting, it will be published twice in the Herald Times and Ellettsville Journal to let taxpayers know about the September 13 public hearing and the October 24 adoption meeting for the Library’s budget.

Accompanying Documents

Worksheet A shows estimated revenue, expense, and cash balances, by fund. **Worksheet B** includes 2013 line item expenditures for all five funds. **Worksheet C** shows line item expenditures in the Operating Fund, compared with 2011 actual expenditures and the 2012 budget. **Worksheet D** provides narrative explanations for lines that changed significantly in 2013. **Worksheet E** includes the capital spending plan for 2013 to 2015.

PRESCRIBED BY DEPT OF LOCAL GOVERNMENT
FINANCE

FORM APPROVED BY STATE BOARD OF ACCOUNTS



Budget Form No. 3

NOTICE TO TAXPAYERS

Complete details of budget estimates by fund and/or department may be seen in the office of this unit of government.

Notice is hereby given to taxpayers of Monroe County Public Library, Indiana that the proper officers of Monroe County Public Library at 5:45 PM on Wednesday, September 19 2012 at 303 East Kirkwood, Bloomington will conduct a public hearing on the year 2013 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of Monroe County Public Library within seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy that taxpayers object to. If a petition is filed, Monroe County Public Library shall adopt with its budget a finding concerning the objections filed and testimony presented. Following the aforementioned hearing, Monroe County Public Library will meet at 5:45 PM on Wednesday, October 24 2012 at 303 East Kirkwood, Bloomington to adopt the following budget:

| | |
|--|--|
| Date and Time of Public Hearing | Date: Wednesday, September 19 2012 Time: 5:45 PM |
| Date and Time of Adoption Mtg. | Date: Wednesday, October 24 2012 Time: 5:45 PM |
| Net Assessed Valuation | \$ 6,750,000,000 |
| Estimated Max Levy | \$ 5,163,373 |

| 1 Fund Name | 2 Budget Estimate | 3 Maximum Estimated Funds to be Raised (Including appeals and levies exempt from maximum levy limitations) | 4 Excessive Levy Appeals (Included in Column 3) | 5 Current Tax Levy |
|-------------------------------------|---|---|---|----------------------------|
| | Click Here to Insert Form 4b published amounts  | Click Here to Insert Form 4b published amounts  | | |
| 0061-RAINY DAY | \$ 400,000 | \$ 0 | \$ 0 | 0 |
| 0101-GENERAL | \$ 7,798,983 | \$ 5,163,373 | \$ 42,975 | 4,534,002 |
| 0180-DEBT SERVICE | \$ 600,000 | \$ 600,000 | \$ 0 | 150,298 |
| 1220-LIBRARY CAPITAL PROJECTS | \$ 0 | \$ 0 | \$ 0 | 488,470 |
| 2011-LIBRARY IMPROVEMENT RESERVE | \$ 350,000 | \$ 0 | \$ 0 | 0 |
| <i>Totals:</i> | <i>Total: \$ 9,148,983</i> | <i>Total: \$ 5,763,373</i> | <i>Total: \$ 42,975</i> | <i>Total: \$ 5,172,770</i> |

2013 Budget - estimated revenue, expense, and cash balances

| Worksheet A | | 2012 Budget after 1782 | 2013 Estimates |
|--|---------------------------------|---------------------------|---------------------|
| Operating Fund | | | |
| Asses. Val. | 2013 estimate plus 500 million | 6,262,434,138 | 6,750,000,000 |
| INCOME | | | |
| <i>Property Tax 2013 using growth quotient estimate 2.8%</i> | | | |
| | Property Tax | \$ 4,534,002 | 5,163,373 |
| | County Option Income Tax | \$ 1,980,075 | \$ 1,954,656 |
| | Commercial Vehicle Excise Tax | \$ 42,483 | \$ 37,000 |
| | Financial Institutions Tax | \$ 12,443 | \$ 10,500 |
| | License Excise | \$ 232,699 | \$ 330,000 |
| | Fines/Fees | \$ 175,000 | \$ 175,000 |
| | Other - misc per dlgr | | |
| | Other - meeting rooms/interest | \$ 15,000 | \$ 12,000 |
| | Other - copiers/PLAC | \$ 16,000 | \$ 20,000 |
| | TOTAL | \$ 7,007,702 | \$ 7,702,529 |
| EXPENSES | | | |
| | Personnel Services | \$ 5,151,056 | \$ 5,290,953 |
| | Supplies | \$ 176,260 | \$ 186,450 |
| | Other Services/Charges | \$ 1,112,730 | \$ 1,300,499 |
| | Capital | \$ 1,147,200 | \$ 1,021,081 |
| | TOTAL before encumbrance | \$7,587,246 | \$7,798,983 |
| | Encumbrance | \$ 54,098 | |
| | | \$ 7,641,344 | |
| FUND BALANCE | | | |
| | Beginning | \$ 1,380,902 | \$ 747,260 |
| | Encumbrance | \$ (54,098) | |
| | Income less exp. | \$ (579,544) | \$ (96,454) |
| | Ending balance | \$ 747,260 | \$ 650,806 |

2012 Budget after

Worksheet A

1782

2013 Estimates

Library Capital Projects Fund

INCOME

| | | | |
|--------------------------------------|----|---------|---------------|
| Property Tax | \$ | 488,470 | combined 2013 |
| 0.0074 Commercial Vehicle Excise Tax | | 4,579 | |
| 0.003 Financial Institutions Tax | | 1,341 | |
| 0.0874 License Excise | | 24,552 | |

TOTAL \$ 518,942

EXPENSES

Capital
Construction, Repair, Remodel
Computer Hardware-Software

TOTAL before encumbrance \$ 543,411

FUND BALANCE

| | | |
|------------------|----|--------------|
| Beginning | \$ | 27,227 |
| Encumbrance | | |
| Income less exp. | \$ | (24,469) |
| Ending balance | \$ | 2,758 |

Debt Service Fund

INCOME

| | | | | |
|--|----|---------|----|---------|
| Property Tax | \$ | 150,298 | \$ | 600,000 |
| Appeal 1782 - corrected levy \$150,298 | | | | |
| 0.0074 Commercial Vehicle Excise Tax | | 2,176 | | 2,000 |
| 0.003 Financial Institutions Tax | | 637 | | 500 |
| 0.0874 License Excise | | 11,666 | | 10,000 |

TOTAL \$ 164,777 \$ 612,500

EXPENSES

| | | | | |
|--------------|----|----------------|----|----------------|
| Bond Payment | \$ | 322,088 | \$ | 600,000 |
|--------------|----|----------------|----|----------------|

FUND BALANCE

| | | | | |
|------------------|----|-----------|----|--------|
| Beginning | \$ | 140,611 | \$ | - |
| Income less exp. | \$ | (157,311) | \$ | 12,500 |
| Ending balance | \$ | (16,700) | \$ | 12,500 |

2012 Budget after

Worksheet A

1782

2013 Estimates

Library Improvement Reserve Fund

| | | | |
|--------------------------------------|--------------|------------------|-------------------|
| INCOME | | | |
| Transfer | | \$ | 214,000 |
| | TOTAL | \$ | - |
| EXPENSES | | | |
| Personal Services | | | |
| Supplies | | | |
| Other Services/Charges | \$ | 100,000 | \$ 100,000 |
| Capital | \$ | 250,000 | \$ 250,000 |
| | TOTAL | \$350,000 | \$ 350,000 |
| FUND BALANCE | | | |
| Beginning | \$ | 1,130,287 | |
| Income less exp. | | | |
| Ending balance - contingency reserve | \$ | 1,130,287 | \$ 1,130,287 |
| Future Projects Balance | | | \$ 214,000 |

Rainy Day Fund

| | | | |
|------------------------|--------------|-------------------|------------------|
| INCOME | | | |
| Transfer | \$ | 200,000 | \$ - |
| EXPENSES | | | |
| Personal Services | \$ | 10,000 | |
| Supplies | | | |
| Other Services/Charges | \$ | 126,359 | \$ 200,000 |
| Capital | \$ | 200,000 | \$ 200,000 |
| | TOTAL | \$ 336,359 | \$400,000 |
| FUND BALANCE | | | |
| Beginning | \$ | 804,672 | \$ 944,672 |
| Income less exp. | \$ | 140,000 | |
| Ending balance | \$ | 944,672 | \$944,672 |

| 2013 BUDGET | | 2013 | 2013 | 2013 | | 2013 | 2013 |
|---|---------------------------------|------------------|------|-----------|------|--------------|------------------|
| Worksheet B | | OPERATING | LIRF | RAINY DAY | LCPF | DEBT SERVICE | TOTAL FUNDS |
| PERSONNEL SERVICES | | | | | | | |
| SALARIES | | | | | | | |
| | 1120 ADMINISTRATION | 177,208 | | | | | |
| | 1130 PROFESSIONAL/SUPERVISORS | 505,886 | | | | | |
| | 1140 PROFESSIONAL ASSISTANTS | 1,271,320 | | | | | |
| | 1150 SPECIALISTS & TECHNICIANS | 845,151 | | | | | |
| | 1160 CLERICAL ASSISTANTS | 434,725 | | | | | |
| | 1170 PAGES/MASTERCONTROLLERS | 240,720 | | | | | |
| | 1180 -see "Other Wages" below | | | | | | |
| | 1190 BUILDING MAINTENANCE | 368,746 | | | | | |
| TOTAL SALARIES | | 3,843,756 | | - | | - | 3,843,756 |
| EMPLOYEE BENEFITS | | | | | | | |
| | 1210 EMPLOYER CONTRIBUTION/FICA | 237,765 | | | | | |
| | 1220 UNEMPLOYMENT COMPENSATION | 10,000 | | | | | |
| | 1230 EMPLOYER CONTRIBUTION/PERF | 404,941 | | | | | |
| | 1240 EMPLOYER CONT/INSURANCE | 725,756 | | | | | |
| | 1250 EMPLOYER CONT/MEDICARE | 55,636 | | | | | |
| TOTAL EMPLOYEE BENEFITS | | 1,434,098 | | - | | | 1,434,098 |
| OTHER WAGES | | | | | | | |
| | 1310 WORKSTUDY | 3,100 | | | | | |
| | 1180 TEMPORARY STAFF | 10,000 | | | | | |
| | 1350 STIPEND | - | | | | | |
| TOTAL OTHER WAGES | | 13,100 | | | | | 13,100 |
| TOTAL PERSONNEL SERVICES (1000s) | | 5,290,953 | | - | | | 5,290,953 |
| SUPPLIES (2000s) | | | | | | | |
| OFFICE SUPPLIES | | | | | | | |
| | 2110 OFFICIAL RECORDS | 1,300 | | | | | |
| | 2120 STATIONERY & PRINTING | 950 | | | | | |
| | 2130 OFFICE SUPPLIES | 14,550 | | | | | |
| | 2140 DUPLICATING | 33,150 | | | | | |
| | 2150 PROMOTIONAL MATERIALS | - | | | | | |
| TOTAL OFFICE SUPPLIES | | 49,950 | | - | | | 49,950 |

| 2013 BUDGET | | 2013 | 2013 | 2013 | | 2013 | 2013 |
|--|--------------------------------------|----------------|------|-----------|------|--------------|----------------|
| Worksheet B | | OPERATING | LIRF | RAINY DAY | LCPF | DEBT SERVICE | TOTAL FUNDS |
| OPERATING SUPPLIES | | | | | | | |
| | 2210 CLEANING SUPPLIES | 37,200 | | | | | |
| | 2220 FUEL, OIL, & LUBRICANTS | 10,000 | | | | | |
| | 2230 CATALOGING SUPPLIES | 5,500 | | | | | |
| | 2240 AUDIO VISUAL SUPPLIES | 10,150 | | | | | |
| | 2250 CIRCULATION SUPPLIES | 37,750 | | | | | |
| | 2260 LIGHT BULBS | 4,500 | | | | | |
| | 2270 RECORDING MATERIALS - CATS | - | | | | | |
| | 2280 UNIFORMS | 1,700 | | | | | |
| | 2290 DISPLAY/EXHIBIT SUPPLIES | 5,900 | | | | | |
| TOTAL OPERATING SUPPLIES | | 112,700 | | - | | | 112,700 |
| REPAIR & MAINTENANCE SUPPLIES | | | | | | | |
| | 2300 IS SUPPLIES | 6,600 | | | | | |
| | 2310 BUILDING MATERIALS & SUPPLIES | 16,800 | | | | | |
| | 2315 ENERGY AUDIT SUPPLIES | - | | | | | |
| | 2320 PAINT & PAINTING SUPPLIES | 400 | | | | | |
| | 2340 OTHER REPAIR & BINDING | - | | | | | |
| | 2350 RECORDING EQUIP SUPPLIES - CATS | - | | | | | |
| TOTAL REPAIR & MAINTENANCE SUPPLIES | | 23,800 | | | | | 23,800 |
| TOTAL SUPPLIES (2000s) | | 186,450 | | - | | | 186,450 |
| OTHER SERVICES/CHARGES (3000s) | | | | | | | |
| PROFESSIONAL SERVICES | | | | | | | |
| | 3110 CONSULTING SERVICES | 12,000 | | 50,000 | | | |
| | 3120 ENGINEERING/ARCHITECTURAL | 10,000 | | | | | |
| | 3130 LEGAL SERVICES | 28,500 | | 50,000 | | | |
| | 3140 BUILDING SERVICES | 32,000 | | | | | |
| | 3150 MAINTENANCE CONTRACTS | 134,100 | | | | | |
| | 3160 OCLC & COMPUTER SERVICES | 66,500 | | | | | |
| | 3170 ADMIN/ACCOUNTING SERVICES | 44,100 | | | | | |
| | 3175 COLLECTION AGENCY SERVICE | 24,000 | | | | | |
| TOTAL PROFESSIONAL SERVICES | | 351,200 | - | 100,000 | | | 451,200 |

| 2013 BUDGET | | 2013 | 2013 | 2013 | | 2013 | 2013 |
|---|-----------------------------------|----------------|----------------|----------------|------|--------------|----------------|
| Worksheet B | | OPERATING | LIRF | RAINY DAY | LCPF | DEBT SERVICE | TOTAL FUNDS |
| OTHER SERVICES/CHARGES (3000s) CONTINUED | | | | | | | |
| COMMUNICATION & TRANSPORTATION | | | | | | | |
| | 3210 TELEPHONE | 30,900 | | | | | |
| | 3220 POSTAGE | 30,000 | | | | | |
| | 3230 TRAVEL EXPENSE | 10,000 | | | | | |
| | 3240 PROFESSIONAL MEETINGS | 10,000 | | | | | |
| | 3250 CONTINUING EDUCATION | 10,000 | | | | | |
| | 3260 FREIGHT & DELIVERY | 1,450 | | | | | |
| TOTAL COMMUNICATION & TRANSPORTATION | | 92,350 | | | | | 92,350 |
| PRINTING & ADVERTISING | | | | | | | |
| | 3310 ADVERTISING & PUBLICATION | 2,750 | | | | | |
| | 3320 PRINTING | 5,500 | | | | | |
| TOTAL PRINTING & ADVERTISING | | 8,250 | | | | | 8,250 |
| INSURANCE | | | | | | | |
| | 3410 OFFICIAL BOND | 700 | | | | | |
| | 3420 OTHER INSURANCE | 60,400 | | | | | |
| TOTAL INSURANCE | | 61,100 | | | | | 61,100 |
| UTILITIES | | | | | | | |
| | 3510 GAS | 3,100 | | | | | |
| | 3520 ELECTRICITY | 292,000 | | | | | |
| | 3530 WATER | 25,900 | | | | | |
| TOTAL UTILITIES | | 321,000 | | | | | 321,000 |
| REPAIR & MAINTENANCE | | | | | | | |
| | 3610 BUILDING REPAIR | 19,000 | 100,000 | 100,000 | | | |
| | 3630 OTHER REPAIR | 10,200 | | | | | |
| | 3640 VEHICLE REPAIR & MAINTENANCE | 8,300 | | | | | |
| | 3650 MATERIALS BINDING/REPAIR | 3,000 | | | | | |
| TOTAL REPAIR & MAINTENANCE | | 40,500 | 100,000 | 100,000 | | | 240,500 |
| RENTALS | | | | | | | |
| | 3710 REAL ESTATE RENTAL/BOND PMT. | 33,600 | | | | 600,000 | |
| | 3720 EQUIPMENT RENTAL | 100 | | | | | |

| 2013 BUDGET | | 2013 | 2013 | 2013 | | 2013 | 2013 |
|---|-------------------------------------|-----------|---------|-----------|------|--------------|-------------|
| Worksheet B | | OPERATING | LIRF | RAINY DAY | LCPF | DEBT SERVICE | TOTAL FUNDS |
| TOTAL RENTALS | | 33,700 | | | | 600,000 | 633,700 |
| OTHER SERVICES/CHARGES (3000s) CONTINUED | | | | | | | |
| OTHER CHARGES | | | | | | | |
| | 3845 ELEC. RECOURCES-DATABASES | 91,701 | | | | | |
| | 3846 E-BOOKS | 73,418 | | | | | |
| | 3910 DUES/INSTITUTIONAL | 7,380 | | | | | |
| | 3920 INTEREST/TEMPORARY LOAN | 2,500 | | | | | |
| | 3930 TAXES & ASSESSMENTS | - | | | | | |
| | 3940 TRANSFER TO LIRF | 214,000 | | | | | |
| | 3945 TRANSFER TO RAINY DAY | - | | | | | |
| | 3950 EDUCATIONAL LICENSING/SERVICES | 3,400 | | | | | |
| TOTAL OTHER CHARGES | | 392,399 | | | | | 392,399 |
| TOTAL OTHER SERVICES/CHARGES (3000s) | | 1,300,499 | 100,000 | 200,000 | | 600,000 | 2,200,499 |
| CAPITAL OUTLAY (4000s) | | | | | | | |
| FURNITURE & EQUIPMENT | | | | | | | |
| | 4410 FURNITURE | - | | 50,000 | | | |
| | 4420 AUDIO VISUAL EQUIPMENT | - | | | | | |
| | 4430 OTHER EQUIPMENT | 16,000 | 175,000 | 100,000 | | | |
| | 4440 LAND & BUILDINGS | - | | | | | |
| | 4450 BUILDING RENOVATION - | - | 75,000 | 50,000 | | | |
| | 4460 IS EQUIPMENT | - | | | | | |
| | 4465 IS SOFTWARE | - | | | | | |
| | 4470 EQUIPMENT - CATS | - | | | | | |
| | 4475 SOFTWARE - CATS | - | | | | | |
| TOTAL FURNITURE & EQUIPMENT | | 16,000 | 250,000 | 200,000 | | | 466,000 |
| OTHER CAPITAL OUTLAY | | | | | | | |
| | 4510 BOOKS | 594,454 | | | | | |
| | 4520 PERIODICALS & NEWSPAPERS | 41,042 | | | | | |
| | 4530 NONPRINT MATERIALS | 369,585 | | | | | |
| | to get to 15% | | | | | | |
| | 4540 ELECTRONIC RESOURCES | - | | | | | |
| TOTAL OTHER CAPITAL OUTLAY | | 1,005,081 | | | | | 1,005,081 |
| | | 12.89% | | | | | |

| | | 2013 | 2013 | 2013 | | 2013 | 2013 |
|--|--------------------------------|-----------|---------|-----------|---------|--------------|-------------|
| | 2013 BUDGET | OPERATING | LIRF | RAINY DAY | LCPF | DEBT SERVICE | TOTAL FUNDS |
| | Worksheet B | | | | | | |
| | TOTAL CAPITAL OUTLAY | 1,021,081 | 250,000 | 200,000 | | | 1,471,081 |
| | TOTAL EXPENDITURES 2013 | 7,798,984 | 350,000 | 400,000 | | 600,000 | 9,148,984 |
| | TOTAL BUDGET 2012 | 7,587,246 | 350,000 | 410,000 | 543,411 | 322,088 | 9,212,745 |
| | Increase from 2012 | 2.79% | 0.00% | -2.44% | | 86.28% | -0.69% |

2013 BUDGET COMPARISON

| Worksheet C | 2013 BUDGET | 2012 BUDGET | 2011 ACTUAL | 2010 ACTUAL |
|---------------------------------|---------------------|---------------------|----------------|----------------|
| PERSONNEL SERVICES (1000'S) | | | | |
| SALARIES | | | | |
| 1120 ADMINISTRATION | 177,208 | 164,792 | 94,376 | 135,206 |
| 1130 PROFESSIONAL/SUPERVISORS | 505,886 | 495,967 | 480,565 | 453,964 |
| 1140 PROFESSIONAL ASSISTANTS | 1,271,320 | 1,291,405 | 1,344,562 | 1,320,105 |
| 1150 SPECIALISTS & TECHNICIANS | 845,151 | 824,582 | 762,827 | 764,114 |
| 1160 CLERICAL ASSISTANTS | 434,725 | 455,807 | 428,505 | 478,551 |
| 1170 PAGES | 240,720 | 268,545 | 235,085 | 226,989 |
| 1180 -see "Other Wages" below | | | | |
| 1190 BUILDING MAINTENANCE | 368,746 | 348,460 | 343,525 | 335,649 |
| TOTAL SALARIES | 3,843,756 | 3,849,558 | 3,689,445 | 3,714,578 |
| EMPLOYEE BENEFITS | | | | |
| 1210 EMPLOYER CONTRIBUTION/FICA | 237,765 | 239,861 | 217,866 | 222,333 |
| 1220 UNEMPLOYMENT COMPENSATION | 10,000 | | - | - |
| 1230 EMPLOYER CONTRIBUTION/PERF | 404,941 | 386,771 | 359,295 | 353,612 |
| 1240 EMPLOYER CONT/INSURANCE | 725,756 | 608,875 | 591,871 | 514,096 |
| 1250 EMPLOYER CONT/MEDICARE | 55,636 | 56,691 | 50,941 | 51,997 |
| TOTAL EMPLOYEE BENEFITS | 1,434,098 | 1,292,198 | 1,219,972 | 1,142,038 |
| OTHER WAGES | | | | |
| 1310 WORKSTUDY | 3,100 | 4,300 | 2,961 | 103 |
| 1180 TEMPORARY STAFF | 10,000 | 5,000 | 8,868 | 52,914 |
| 1350 STIPEND/RECLASSIFICATION | | | - | - |
| TOTAL OTHER WAGES | 13,100 | 9,300 | 11,829 | 53,017 |
| TOTAL PERSONNEL SERVICES | 5,290,953 67.84% | 5,151,056 67.89% | 4,921,246 | 4,909,632 |
| SUPPLIES (2000'S) | | | | |
| OFFICE SUPPLIES | | | | |

Worksheet C

| | 2013 BUDGET | 2012 BUDGET | 2011 ACTUAL | 2010 ACTUAL |
|--|----------------|----------------|----------------|----------------|
| 2110 OFFICIAL RECORDS | 1,300 | 1,000 | 1,613 | 148 |
| 2120 STATIONERY & PRINTING | 950 | 2,760 | 302 | 2,388 |
| 2130 OFFICE SUPPLIES | 14,550 | 21,300 | 10,758 | 14,794 |
| 2140 DUPLICATING | 33,150 | 24,100 | 27,874 | 19,173 |
| 2150 PROMOTIONAL MATERIALS | | | - | - |
| TOTAL OFFICE SUPPLIES | 49,950 | 49,160 | 40,546 | 36,504 |
| OPERATING SUPPLIES | | | | |
| 2210 CLEANING SUPPLIES | 37,200 | 30,650 | 34,906 | 28,578 |
| 2220 FUEL, OIL, & LUBRICANTS | 10,000 | 11,000 | 7,818 | 7,532 |
| 2230 CATALOGING SUPPLIES-BOOKS | 5,500 | 5,500 | 3,652 | 4,842 |
| 2240 A/V SUPPLIES-CATALOGING | 10,150 | 10,950 | 7,730 | 9,439 |
| 2250 CIRCULATION SUPPLIES | 37,750 | 33,000 | 22,609 | 190,890 |
| 2260 LIGHT BULBS | 4,500 | 3,000 | 3,763 | 4,566 |
| 2270 VIDEOTAPE - CATS | | | - | - |
| 2280 UNIFORMS | 1,700 | 1,900 | 1,261 | - |
| 2290 DISPLAY/EXHIBIT SUPPLIES | 5,900 | 5,400 | 459 | 1,226 |
| TOTAL OPERATING SUPPLIES | 112,700 | 101,400 | 82,197 | 247,074 |
| REPAIR & MAINTENANCE SUPPLIES | | | | |
| 2300 IS SUPPLIES | 6,600 | 6,600 | 4,725 | 6,313 |
| 2310 BUILDING MATERIALS & SUPPLIES | 16,800 | 15,800 | 14,093 | 12,814 |
| 2315 ENERGY AUDIT MATERIALS | | 2,000 | 1,490 | |
| 2320 PAINT & PAINTING SUPPLIES | 400 | 300 | 127 | 234 |
| 2340 OTHER REPAIR & BINDING | | 1,000 | - | 38 |
| 2350 VIDEO MATERIALS - CATS | | | - | - |
| TOTAL REPAIR & MAINTENANCE SUPPLIES | 23,800 | 25,700 | 20,436 | 19,399 |
| TOTAL SUPPLIES | 186,450 | 176,260 | 143,179 | 302,976 |
| OTHER SERVICES/CHARGES (3000'S) | | | | |
| PROFESSIONAL SERVICES | | | | |
| 3110 CONSULTING SERVICES | 12,000 | 3,000 | 250 | 8,360 |

Worksheet C

| | 2013 BUDGET | 2012 BUDGET | 2011 ACTUAL | 2010 ACTUAL |
|---|----------------|----------------|----------------|----------------|
| 3120 ENGINEERING/ARCHITECTURAL | 10,000 | 40,000 | 2,863 | 19,007 |
| 3130 LEGAL SERVICES | 28,500 | 15,500 | 14,674 | 11,333 |
| 3140 BUILDING SERVICES | 32,000 | 40,000 | 21,786 | 32,618 |
| 3150 MAINTENANCE CONTRACTS | 134,100 | 139,840 | 94,571 | 80,244 |
| 3160 COMPUTER SERVICES (OCLC) | 66,500 | 51,300 | 49,343 | 44,579 |
| 3170 ADMIN/ACCOUNTING SERVICES | 44,100 | 36,500 | 43,488 | 61,194 |
| 3175 COLLECTION AGENCY SERVICES | 24,000 | 24,000 | 44,204 | |
| TOTAL PROFESSIONAL SERVICES | 351,200 | 350,140 | 271,179 | 257,336 |
| COMMUNICATION & TRANSPORTATION | | | | |
| 3210 TELEPHONE | 30,900 | 30,600 | 27,523 | 29,963 |
| 3220 POSTAGE | 30,000 | 30,000 | 23,045 | 27,049 |
| 3230 TRAVEL EXPENSE | 10,000 | 10,000 | 3,809 | 1,226 |
| 3240 PROFESSIONAL MTG. (OFF-SITE) | 10,000 | 10,000 | 779 | 862 |
| 3250 CONTINUING ED. (ON-SITE) | 10,000 | 10,000 | 9,390 | 1,193 |
| 3260 FREIGHT & DELIVERY | 1,450 | 1,000 | 1,235 | 708 |
| TOTAL COMMUNICATION & TRANSPORTATION | 92,350 | 91,600 | 65,781 | 61,001 |
| PRINTING & ADVERTISING | | | | |
| 3310 ADVERTISING & PUBLICATION | 2,750 | 2,900 | 1,064 | 2,567 |
| 3320 PRINTING | 5,500 | 5,900 | 3,018 | 1,817 |
| TOTAL PRINTING & ADVERTISING | 8,250 | 8,800 | 4,082 | 4,384 |
| INSURANCE | | | | |
| 3410 OFFICIAL BOND | 700 | 700 | 450 | 660 |
| 3420 OTHER INSURANCE | 60,400 | 55,400 | 52,797 | 47,405 |
| TOTAL INSURANCE | 61,100 | 56,100 | 53,247 | 48,065 |
| UTILITIES | | | | |
| 3510 GAS | 3,100 | 3,800 | 2,227 | 2,465 |
| 3520 ELECTRICITY | 292,000 | 290,500 | 270,576 | 275,462 |
| 3530 WATER | 25,900 | 17,900 | 15,685 | 16,521 |

| Worksheet C | 2013 BUDGET | 2012 BUDGET | 2011 ACTUAL | 2010 ACTUAL |
|------------------------------------|----------------|----------------|----------------|----------------|
| TOTAL UTILITIES | 321,000 | 312,200 | 288,488 | 294,448 |
| REPAIR & MAINTENANCE | | | | |
| 3610 BUILDING REPAIR | 19,000 | 22,000 | 3,937 | 16,277 |
| 3630 OTHER EQUIP/FURNITURE REPAIRS | 10,200 | 13,800 | 21,393 | 28,448 |
| 3640 VEHICLE REPAIR & MAINTENANCE | 8,300 | 6,000 | 6,055 | 10,575 |
| 3650 MATERIAL BINDING/REPAIR SERV. | 3,000 | 3,000 | 1,788 | 2,065 |
| TOTAL REPAIR & MAINTENANCE | 40,500 | 44,800 | 33,173 | 57,365 |
| RENTALS | | | | |
| 3710 REAL ESTATE RENTAL/BOND PMT. | 33,600 | 33,600 | 31,262 | 31,405 |
| 3720 EQUIPMENT RENTAL | 100 | 100 | - | 7,062 |
| TOTAL RENTALS | 33,700 | 33,700 | 31,262 | 38,467 |
| OTHER CHARGES | | | | |
| 3845 ELEC. REOURCES-DATABASES | 91,701 | | | |
| 3846 E-BOOKS | 73,418 | | | |
| 3910 DUES/INSTITUTIONAL | 7,380 | 7,590 | 7,326 | 1,303 |
| 1004 MISCELLANEOUS | | | 1,651 | |
| 3920 INTEREST/TEMPORARY LOAN | 2,500 | 2,500 | - | - |
| 3930 TAXES & ASSESSMENTS | | | - | - |
| 3940 TRANSFER TO LIRF | 214,000 | | 200,000 | 150,000 |
| 3945 TRANSFER TO RAINY DAY | | 200,000 | | |
| 3950 EDUCATIONAL SERV/LICENSING | 3,400 | 5,300 | 2,404 | 4,620 |
| TOTAL OTHER CHARGES | 392,399 | 215,390 | 211,381 | 155,923 |
| TOTAL OTHER SERVICES/CHARGES | 1,300,499 | 1,112,730 | 958,593 | 916,989 |
| CAPITAL OUTLAY (4000'S) | | | | |
| FURNITURE & EQUIPMENT | | | | |
| 4410 FURNITURE | | 1,000 | 1,400 | 59,331 |
| 44105 ENCUMBERED FURNITURE | | | 1,388 | |
| 4420 AUDIO VISUAL EQUIPMENT | | - | - | - |
| 4430 OTHER EQUIPMENT | 16,000 | 8,300 | 9,434 | 2,956 |

Worksheet C

| | 2013 BUDGET | 2012 BUDGET | 2011 ACTUAL | 2010 ACTUAL |
|-------------------------------|----------------|----------------|----------------|----------------|
| 4440 LAND & BUILDINGS | | | - | - |
| 4450 BUILDING RENOVATIONS | | | 5,830 | 155,474 |
| 4460 IS EQUIPMENT | | | - | - |
| 4465 IS SOFTWARE | | | - | 3,307 |
| 4470 EQUIPMENT - CATS | | | - | - |
| 4475 SOFTWARE - CATS | | | - | - |
| | <hr/> | | | |
| TOTAL FURNITURE & EQUIPMENT | 16,000 | 9,300 | 18,051 | 221,067 |
| OTHER CAPITAL OUTLAY | | | | |
| 4510 BOOKS | 594,454 | 595,008 | 585,377 | 586,780 |
| 4520 PERIODICALS & NEWSPAPERS | 41,042 | 45,971 | 38,779 | 42,489 |
| 4530 NONPRINT MATERIALS | 369,585 | 368,338 | 385,644 | 376,471 |
| to get to 15% | - | - | | |
| 4540 ELECTRONIC RESOURCES | - | 128,583 | 79,194 | 54,862 |
| | <hr/> | | | |
| TOTAL OTHER CAPITAL OUTLAY | 1,005,081 | 1,137,900 | 1,088,994 | 1,060,602 |
| | 15.00% | 15.00% | | |
| TOTAL CAPITAL OUTLAY | 1,021,081 | 1,147,200 | 1,107,045 | 1,281,669 |
| | <hr/> | | | |
| TOTAL OPERATING EXPENDITURES | 7,798,984 | 7,587,246 | 7,130,064 | 7,411,266 |
| | <hr/> <hr/> | | | |

Monroe County Public Library
2013 Budget: Line Item Detail Narrative
Updated July 26, 2012

OPERATING FUND

(Income for this fund comes from a property tax levy, County Option Income Tax (COIT), Financial Institutions Tax, License Excise Tax, Commercial Vehicle Excise Tax, and non-tax revenue from copiers, fines, fees, Public Library Access Card reimbursements.)

| <u>Line</u> | <u>Comment</u> |
|--------------------|---|
| 1120-1190 | <p>Changes from the 2012 budget resulting in <u>decreased</u> wage cost include: Two 25-hour professional assistants and one reference assistant who retired or resigned after the 2012 budget was completed in mid-2011 were not replaced. Circulation Clerk expenditure is reduced by about \$16,000 in 2013 and Page expenditure is reduced by about \$28,000, based on the actual wage costs for 2011 and efficiencies resulting from automated materials handling.</p> <p>Changes from the 2012 budget resulting in <u>increased</u> wage cost include: Annual 2% wage increase for employees. This could change depending on health insurance cost (1240). A reference assistant position has been added (about \$41,000). An additional 20-hour security position was added in response to increased efforts to promote positive behavior and a welcoming environment.</p> |
| 1180 | Small reserve fund set aside in order to address temporary staffing shortages. |
| 1210 | FICA = 6.2% of total wages |
| 1220 | The library is self-insuring for unemployment insurance. This amount is appropriated to cover any claims during 2013. Previously budgeted in the Rainy Day Fund, this amount is moved to the Operating Fund budget at the direction of the State Board of Accounts. |
| 1230 | The library contributes 13% of wages for full-time employees to the Indiana Public Employees Retirement System. |
| 1240 | Employer contribution to health insurance estimated at 10% increase. We have also budgeted \$30,000 to allow for new employees to be added to the plan as a result of employee turnover during the year. Once we know how the group's claims experience impacts the 2013 premium rates we will be able to finalize this estimate along with the annual wage increase estimate. |
| 1310-1350 | Wages for temporary staff, including work-study students. |
| 2210 | Cleaning supplies increase reflects increased cost of maintenance for second floor tile areas. |

WORKSHEET D: 2013 LINE ITEM DETAIL NARRATIVE: ALL FUNDS

- 2250 Anticipated costs of RFID tags, after lower-than-expected cost in 2011 due to use of remaining tags from initial purchase in 2010.
- 3110-3120 Consulting fees are in the budget as a placeholder. The I.S. department allocation of \$5,000 is new for 2013 and it is related to expected assistance with network configuration and increased capacity for data storage. The main roof addition is planned for 2013 and could possibly involve consulting or engineering services.
- 3160 Additional \$15,000 estimated for cost related to increase internet band-width to allow for increase in wireless access to internet service outside the Main and Ellettsville branch.
- 3845-3846 Electronic Resources – Databases and E-books: The State Board of Accounts changed the classification from “Capital Outlay” to “Other Services and Charges,” so we have moved expenditures here. In addition, allocation for e-resources reflects \$36,155 increase. Expenditures in these two lines continue to count toward 15% of budget required to meet State Standards at enhanced level.
- 3940 Transfer \$214,000 to LIRF Fund for emergency needs and future projects.
- 4510-4540 Collection materials expenditures equal 15% of Operating Fund budget (including 3845 and 3846) to continue to meet State Standards for materials expenditures at the enhanced level.

LIBRARY IMPROVEMENT RESERVE FUND (LIRF)

(This fund derives income from end-of-year transfers from the Operating Fund and can only be used for capital expenditures.)

- 3610 Appropriated in case of emergency building repairs exceeding amount appropriated in Operating Fund.
- 4430 Appropriated in case equipment replacement expenditures or new equipment related to the renovation exceed the amount appropriated in Operating Fund.
- 4450 Appropriated in case emergency building renovations are needed.

RAINY DAY FUND

(This fund derives income from unanticipated revenue from COIT and can be spent on any category allowed by the Operating Fund.)

- 3110 Appropriated to cover unexpected need for consultant services.

WORKSHEET D: 2013 LINE ITEM DETAIL NARRATIVE: ALL FUNDS

- 3130 Appropriated in case Operating Funds are insufficient to cover legal costs.
- 3610 Appropriated to cover emergency building repairs exceeding amount appropriated in Operating Fund.
- 4410 - 4430 Appropriated in case of unanticipated need for furniture or equipment.
- 4450 Appropriated for unanticipated need for building renovation.
-

LIBRARY CAPITAL PROJECTS FUND

(This fund was used in the 2012 budget. In 2013 the levy amount for this fund was combined with the general fund levy to make up for the loss of COIT revenue when pre-2005 debt was paid off.)

DEBT SERVICE FUND

(This fund derives its income from a separate property tax levy and can only be spent to pay off bond indebtedness.)

- 3710 First payment on 2013-2015 general obligation bond.

| MCPL CAPITAL SPENDING PLAN SUMMARY | | | | |
|---|------------------|--|------------------|------------------|
| Worksheet E | | | | |
| | LCPF | General Obligation Bond 2013-2015 | | |
| | 2012 | 2013 | 2014 | 2015 |
| Expenditures | | | | |
| Main Renovation Phase III and IV | \$418,411 | \$0 | \$0 | |
| Roof - Main Addition | \$0 | \$400,000 | \$0 | |
| Chillers - Main HVAC | \$0 | \$0 | \$300,000 | |
| Ellettsville Circ. And reference desk area renov. | \$0 | \$25,000 | \$0 | |
| Ellettsville Yellow House Demolished in 2011 - cost \$18,096 (LIRF) | | | | |
| Ellettsville Garden / Courtyard | \$0 | \$0 | \$50,000 | |
| I.S. Equipment | \$50,000 | \$58,000 | \$50,000 | \$50,000 |
| I.S. Software | \$25,000 | \$25,000 | \$25,000 | \$25,000 |
| CATS Equipment | \$45,000 | \$45,000 | \$45,000 | \$45,000 |
| CATS Software | \$5,000 | \$5,000 | \$5,000 | \$5,000 |
| New Phone System | | | \$25,000 | \$25,000 |
| Landscaping Main Library - Landscaping Main Library - to be done in 2012 | | \$17,000 | | |
| Replace Cobbled Sidewalks at Kirkwood and Parking Lot | | | | \$25,000 |
| Replace 1993 Van | | \$25,000 | | |
| Replace Elevator Controls - Main | | | \$100,000 | |
| Auditorium Renovation | | | | \$150,000 |
| Renovate Third Floor - I.S. dept., security, graphics, floor covering | | | | \$225,000 |
| Frequency Drives - Air Handler replacement - HVAC system | | | | \$50,000 |
| | | | | |
| Sub Total of Expenditures | \$543,411 | \$600,000 | \$600,000 | \$600,000 |
| rev 6-4-12 | | | | |

Internet and Computer Use Policy

INTRODUCTION

This is a library-wide policy for the management of computer data networks and the resources they make available, as well as stand-alone computers that are owned and administered by the Monroe County Public Library (MCPL). The policy reflects the principles of MCPL. It specifies the Library's objectives in providing computing resources for public use, and the responsibilities assumed by the users of such resources.

In accord with the Indiana Code (IC 36-12-1-12), MCPL performs a public review of this Internet and Computer Use Policy annually.

OBJECTIVES

MCPL provides computers which allow public access to a variety of electronic resources, including in-house databases (the library catalog, magazine indexes, and business directories), productivity software (word processors, spreadsheets, etc.), and the Internet (primarily through Web browsers). While MCPL does not provide email accounts, patrons may send and receive email if they have an account accessible through the World Wide Web.

In keeping with our general policies, MCPL protects patrons' rights to privacy and confidentiality. MCPL keeps any communications that reside on its computer network confidential. However, in general, electronic communication is not secure and networks are sometimes susceptible to outside intervention. As part of normal system maintenance, network administrators do monitor system activity, but the library does not reveal information about an individual's use of computer resources unless compelled to do so by a court order.

To promote equitable access to computer resources, MCPL utilizes time management software. To access the Internet, an individual must use his or her own library card number or guest pass number. Staff may also take other measures to manage Internet time including (but not restricted to) reserving terminals for individuals or groups with specific needs.

USER RESPONSIBILITIES

To ensure fair and proper use of library computing resources, users must follow the legal and cooperative rules listed below.

Legal Responsibilities:

Computing resources may only be used for legal purposes. Examples of illegal use include, but are not limited to, the following:

- Attempting to alter or damage computer equipment, software configurations, or files belonging to MCPL, other users, or external networks
- Attempting unauthorized entry to MCPL's network or external networks
- Intentional propagation of computer viruses, trojans, etc.
- Violation of copyright or communications laws
- Violation of software license agreements
- Transmission of speech not protected by the First Amendment, such as libel and obscenity

Cooperative Responsibilities:

MCPL strives to balance the rights of users to access different information resources with the rights of users to work in a public environment free from harassing sounds and visuals. We ask all our library users to remain sensitive to the fact that they are working in a public environment shared by people of all ages, with a variety of information interests and needs. In order to ensure an efficient, productive computing environment, the Library insists on the practice of cooperative computing. This includes:

- Respecting the privacy of other users
- Not using computer accounts, access codes, or network identification codes assigned to others
- Refraining from overuse of connect time, information storage space, printing facilities, processing capacities, or bandwidth capacities
- Refraining from the use of sounds and visuals which might disrupt the ability of other library patrons to use the library and its resources

SANCTIONS

MCPL relies on the cooperation of its users in order to efficiently and effectively provide shared resources and ensure community access to a wide range of information. If individuals break these acceptable use rules in any way, their right to use networked resources may be suspended for a specified time, depending on the damage caused by their actions. They will be notified of the length of and reason for the suspension. Individuals using library computing resources for illegal purposes may also be subject to prosecution.

COMPUTER USE AT MCPL INCLUDES PUBLIC ACCESS TO THE INTERNET

MCPL aims to develop collections, resources, and services that meet the cultural, educational, informational and recreational needs of its diverse community, and which respond to advances in technology. With this goal in mind, and as part of its mission to meet the changing needs of the community, MCPL offers access to the Internet.

A global network of computers, the Internet provides access to a wide variety of educational, recreational and reference resources, many of which are not available in print, but there is no central control over its content or users. The Internet contains a diverse range of information, some of which may be objectionable or offensive.

MCPL cannot protect users from offensive Internet content, but librarians can offer advice and suggestions to help ensure effective Internet searching.

MCPL has investigated filters designed to restrict access to various online content, but has found them to be both overly broad (restricting access to materials that no one would find objectionable) and not fully effective (allowing access to a considerable number of sites of the sort they purport to block). Given these limitations, MCPL has not installed such software. In order to provide alternatives for minors, MCPL does provide links through the Children's site to search engines with filters.

DISCLAIMERS

Except for the Web pages produced by the Library, MCPL does not control Internet content and makes no general effort to limit Internet access. However, when informed of a violation of MCPL's Internet and Computer Use Policy, library staff will enforce the legal and cooperative responsibilities outlined above.

As with other materials, parents and guardians of minor children – not the library nor its staff – are responsible for supervising their children's use of Internet resources at the library.

MCPL cannot ensure the availability nor the accuracy of external electronic resources. Like print materials, not all electronic sources provide accurate, complete or current information. Users need to be good information consumers, questioning the validity of information.

LIMITATION OF LIABILITY

MCPL assumes no liability for any loss or damage to users' data or devices, nor for any personal damage or injury incurred as a result of using MCPL's computing resources. This includes damage or injury sustained from invasions of the user's privacy.

Adopted by the Board of Trustees of the Monroe County Public Library on June 20, 2007. MCPL thanks the [Saint Joseph County Public Library](#) for allowing us to adapt their Computer Usage Policy as well as the many public libraries across the country who have shared information and made their policies accessible.

Reaffirmed by [Board of Trustees](#), June 17, 2009 and September 15, 2010.

Internet Filtering Recommendation

from the Encouraging Positive Patron Behavior Committee

The Indiana Public Library Standards require that the Board of Trustees adopt an Internet and Computer Use Policy and review it annually. The following report details the Library's 2012 review of the principles of open access, effectiveness of filters, and behavioral issues related to unfiltered access to the Internet and the Library's processes for reducing them.

The committee recommends that the Board make no changes in the current Internet and Computer Use Policy.

1. Intellectual Freedom and Open Access Are Core Principles of the Library.

Certain core principles underscore the policies and practices at Monroe County Public Library. One of the most deeply held is intellectual freedom. We reference it in many key policy documents:

Our Circulation Policy states: *Individual patrons determine for themselves what library materials are appropriate for personal checkout or viewing. [...] The Monroe County Public Library endorses and defends the concepts of intellectual freedom, as protected by the United States Constitution and as described in the Library Bill of Rights.*

Our Collection Development Policy, most recently approved in March, 2012, includes the following: *The library recognizes some materials may be considered controversial and may offend some users. [...] The Board of Trustees of Monroe County Public Library adopts and declares that the American Library Association's Intellectual Freedom Statements will guide the development of the Library's collections. Specifically the library will adhere to and support the American Library Association's "Library Bill of Rights" ([Appendix A](#)), "Freedom to Read" ([Appendix B](#)), "Freedom to View" ([Appendix C](#)), and "Interpretations of the Library Bill of Rights" ([Appendix D](#)).*

Our Internet and Computer Use Policy states: *The Internet contains a diverse range of information, some of which may be objectionable or offensive. MCPL cannot protect users from offensive Internet content, but librarians can offer advice and suggestions to help ensure effective Internet searching.*

The Library Bill of Rights states, among other relevant passages: *Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.*

Filtering in the Children's Services Department

Unlike the schools, we do not act *in loco parentis* (in place of the parents). Knowing this, we would rather continue to expect civil behavior from our patrons and allow them to choose for themselves what is appropriate for their children.

Because of smart phones, tablets, and a host of other mobile devices, the Internet is now ubiquitous. Not only information gathering, but basic communication is evolving at a phenomenal rate. The ability to find, use, evaluate, and create information is critical in education, in the workplace, and in individual's personal lives. Increasingly, children, teens, and adults use personal devices such as cell phones and tablets for Internet connectivity that would be completely unaffected by our filters. When the library provides free and unfettered Internet access, we are helping patrons, including young people, gain crucial information literacy skills necessary to function in our society. Having been asked to review this issue, the committee believes that the matter of civil behavior and use of the Internet in a public place go hand in hand and therefore the library plays an important role in educating patrons about the need for responsible behavior in public places.

Filtering computers in the children's department could be perceived as "promising safety" when in fact, we should be educating children about how to be more savvy Internet users.

Employing filters in the Children's Department would directly violate our policy of providing free and equal access to information, regardless of age. According to the American Library Association's Intellectual Freedom brochure:

- Over-blocking legal content affects minors' First Amendment right to access constitutionally protected material in the library.
- Under-blocking may cause students to view inappropriate images and text.
- Filtering de-emphasizes education as the best means of teaching children to be smart and safe while using the Internet, and it gives adults a false sense of security.

2. Filtering Technology Is Not Reliable

In 2008, San Jose Public Library conducted its own tests of Internet filters in order to answer questions from their Board. Filter testing conducted by professional librarians from San José city libraries and SJSU library staff, aided by City IT staff, concluded that filters over-block and under-block keyword searches by 15-20%.

For example, using filters, test searchers were able to access pornography 15-20% of the time. On the other hand, they were blocked access to medical information, or even literary sites, that contain keywords that were on blocked lists.

The San Jose library also gathered feedback from city and county agencies and the general public.

The San Jose Library Commission reported that:

“Filtering remains a challenge as it can create embarrassing situations for those who search for answers to specific medical conditions or other personal information requests. Legitimate history and art sites and photographs useful for research can also be blocked. Many library users won’t ask for help now and would certainly find it impossible to ask for a site to be unblocked.

Filters are no substitute for parental supervision and a conscious awareness by both patrons and library staff of events that go on in the library. Current staff is trained to appropriately handle situations as they arise.

With so few incidences or complaints system-wide, library patrons should enjoy the freedom to gather information without City intervention.”

We at MCPL have searched for research articles that might detail the effectiveness of filters since the 2008 study and have not found anything indicating improvement. *(In fact, it seems researchers have largely moved away from analyzing the effectiveness of filtering, possibly because the state of the art has not changed recently.)* We used several research and citation databases from the information science disciplines, and we found no recent research. Opinion pieces continue to be written. We did learn that some researchers are working on filtering based on other technologies, such as image filtering, but none of these are beyond initial stages and are far from the marketplace as of this report.

We also interviewed a sample of peer Indiana libraries and found a range of filter policies in place, from open access (no Internet filter) to very aggressive filters (no chat, social media, etc).

Filtering technology available to libraries for purchase has not changed significantly in the last five years; it still works by blocking words and/or sites. The overall effectiveness of filtering software depends on the settings which will block more or less content, and those settings, in turn, relate directly to the “false hits” problem identified in research on filtering: the more effective a filter is, the more likely it is to block information that would otherwise be deemed appropriate in a public library setting. This committee was asked to look at the effectiveness of filtering and we have concluded that the issues surrounding Internet filters have not changed significantly since the library first adopted its Internet and Computer Use Policy in 1997.

3. **The Library's Processes Minimize The Behavioral Issues Related to Computer Use and are Being Improved**

The Encouraging Positive Behavior Committee has been charged to:

“Develop a comprehensive strategy involving staff, patrons, and community stakeholders to address negative patron behavior and its impact in and around the library buildings and Outreach sites.”

The issue of objectionable information on library computers is not new. Obviously, information available on the Internet is sometimes objectionable. Complaints of improper Internet use are few when compared to the number of complaints about noise from headphones and loud conversations at the computers or violations of other library behavioral rules.

The committee believes this is an opportunity to address the perception issue that corresponds with not implementing Internet filtering. The library is an important cultural and civic resource in the community and occupies the unique place of being able to speak with authority on the topic of information use in a time of what we believe to be nearly total access to all types of content, regardless of attempts to filter. There is responsible and civil behavior with respect to the Internet, and there can sometimes be inappropriate behavior that should not be tolerated in an atmosphere of research, learning and knowledge. Behavior that is obviously uncivil and that may result in the disruption of other patrons' use of the library should not be tolerated. We believe library values, as expressed in MCPL policies (*Internet and Computer Use Policy* and *Behavioral Rules*) grant the library the ability and the powers necessary to ensure a high degree of acceptable and civil Internet viewing.

To ensure the best possible behavior, we employ three strategies:

- a) Zero tolerance for inappropriate behavior: Patrons are expected to monitor their own viewing in our shared computer environment. No viewing of inappropriate material should be visible to other patrons. This rule is outlined in the computer use policy that patrons have to accept in order to access public computers

- b) Recessed monitors for public computing: The library already has recessed monitors available on approximately one-third of public computers. Patrons using these computers have a reasonable expectation of privacy and may use them for viewing potentially sensitive content, e.g., online banking, medical information, etc.

- c) Staff monitoring and enforcement: Occasionally, patrons complain about content they've viewed on another public computer. Staff members report that it is often difficult to monitor inappropriate Internet content because offending patrons often "click away" from the content, or they click to another open window to hide it. Nevertheless, if the effect is that patrons will self-monitor as a result of staff members being out among the computers, we recommend that public service staff implement more frequent roving in the computer areas.

Children's Services staff vigilantly watches for a variety of threats to the comfort and safety of children in the library. On a daily basis, we provide better and more nuanced protection than any filter. (In general, we view unaccompanied adults as a much greater threat than inappropriate use of the Internet.)

We continue to provide links to a variety of child-friendly web sites including filtered search engines, and children and adults are instructed by staff, through our web site, and in our handouts, on how to use the Internet safely.

Improvements

- a) More frequent roving in computer areas: We believe that a higher staffing presence will help to improve the overall behavioral environment in the public computing areas, while simultaneously improving overall customer service.

Behavioral policy enforcement should be sufficiently strict to deter infractions. **The committee recommends a six-month ban for patrons who, after one warning, continue to disrupt others use of the library while using public computers.**

- b) New signage and branding to reinforce cooperative computing and civil behavior: Both patrons and staff expressed surprise and gratitude at the effect of making library property 100% tobacco free. Behaviors changed in and outside of the library, and the atmosphere improved dramatically. The actual policy change made by the Board in January, 2012 was minor, but it benefited us by drawing community-wide attention to our efforts. We followed that with enforcement by all levels of staff and newly designed signage and branding.

The committee recommends changing the current lengthy computer use acceptance required by patrons logging on with the attached reminder that they are in a shared computing environment and there will be consequences if they disrupt others use of the library. Patrons will be required to acknowledge this simple reminder before being granted access to computers.

Additionally, Internet browsers at public computers will reinforce our message of civil responsibility before directing patrons to the library home page.

We believe that all of these changes will replicate the success of our work to make the library property 100% tobacco-free, and address negative perceptions of the library while also honoring MCPL's historic commitment to intellectual freedom.