

# Best Practice in Data Collection

Report of a benchmarking exercise for  
Leicestershire Library Services and  
Warwickshire Library and Information Service

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Occasional Paper no. 36

March 2006

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Loughborough: LISU, March 2006

LISU Occasional Paper no. 36

ISBN 13: 978-1-905499-07-6

ISBN 10: 1-905499-07-8

Originally published for participating authorities in September 2005

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*Published and distributed by*

LISU

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This report presents a snapshot of data and supporting information for 2002-03 (unless stated otherwise), which is anonymised at the request of participating authorities. More information may be available. For details contact:

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## Executive summary

### Background

LISU have worked with Leicestershire, Warwickshire and five similar library authorities primarily to investigate the relative cost of their library services. Authorities similar to Leicestershire, both in terms of geographical characteristics and library output measures, were identified by means of a statistical exercise. By exploring, during interviews, how each authority compiles the data it submits to CIPFA, light has been shed on differences in the figures between authorities, particularly in terms of financial data and key library use indicators. The exercise was based on CIPFA data for 2002-03 – the most current available at the time of the investigation.

In undertaking this exercise, areas for potential exchange of good practice were identified, and these were then investigated in more detail during a seminar in the final stage of the project. The focus was on underlying differences in staffing structures and staff expenditure; areas where there is a large disparity between authorities. Variations in the provision of ICT and related expenditure, and procedures for visitor counting were also investigated.

### Key findings

There is considerable variation in the methods used to compile figures for the CIPFA return, and many of the figures are not truly comparable between authorities. Reasons for disparities in the data include:

- Organisational differences
- Difficulties in apportioning costs to the library service from wider units/departments
- Different accounting protocol
- Insufficient guidance from CIPFA
- Lack of respondents' notes to accompany returns

Some of the most significant differences were found in miscellaneous and other income and expenditure categories, and in support services expenditure. This is perhaps not surprising, as these are somewhat 'catch-all' categories. However, whilst there will inevitably be genuine differences in the figures between authorities, in the absence of accompanying notes, it is unclear what is being included in each of the categories. **It is therefore important to look at how money is spent, rather than simply the amount spent in the CIPFA categories**, and to consider the service as a whole, not just financial measures. A key area relates to the apportionment of corporate overheads, which vary considerably between authorities, but over which library services have no control.

### Staffing

Although authorities are providing broadly the same service, there are significant differences in staffing structures and deployment. A key issue is central/support staff, and where they feature in the CIPFA return, in terms of both staff numbers and expenditure. Whilst organisational differences are inherent between authorities, **it would be useful to identify various models of organisational structure, for meaningful comparisons to be made**. Further investigation is now being conducted within the group, focusing on staff deployment, the extent to which support services are centralised and the impact of having centralised support services.

### *ICT provision*

There are broad similarities in the provision of ICT within the group, with all authorities having a combination of local and central support. However, the way in which the related costs are dealt with varies considerably, and it was found that the same type of expenditure could be found in any one of three categories in the CIPFA return. **A consistent approach to the breakdown of ICT-related statistics is seen to be essential**, and the group is now investigating how this can be achieved. Sustainability of ICT infrastructure was raised as an area of concern, as was the difficulty in evaluating the use of electronic services.

### *Visit figures*

Visit figures, being subject to much public scrutiny, are an important consideration for all authorities. Within the group, there is variation in how visitors are defined and counted, and which figures are reported to CIPFA; largely dependent on whether automatic counting equipment is in place. There is concern that there are no standard guidelines for checking/calibrating automatic counters, especially as an increasing number of authorities rely on these. **A standard definition and procedure were called for by the group**, to achieve consistency, both between authorities and over time.

### **Identifying good practice**

During the seminar discussion some areas for the potential exchange of good practice were identified. **Such examples should now be investigated in more detail** within the group.

- Staff deployment models, including use of para-professionals and structured use of volunteers
- Centralised administrative support, and associated efficiency gains
- Strong library branding, with marketing and promotion to increase library awareness and use
- Use of community profiling to identify the needs of users
- Use of short loan collections of popular stock, to increase issues.

## Investigation of data collection methods of the benchmarking group

### Introduction

This report details the findings of the second stage of the benchmarking project undertaken for Leicestershire County Library Service and Warwickshire Library and Information Service. The aim has been to collect information about the methods used to arrive at figures included in the CIPFA Actuals. The exercise has been based on data for 2002-03, which were the most current available at the time of the investigations, which were undertaken in late 2004. With this in mind, respondents were asked to supply answers that reflect figures for that year.

The first stage of the project recommended a group of comparators, with similar population distribution characteristics to Leicestershire (*Appendix A*). This group was extended to include two additional authorities of particular interest to the clients. Of the nine authorities identified, six have participated in the benchmarking stage, bringing the total group size to seven. The authorities are:

Leicestershire	Cambridgeshire
Derbyshire	Nottinghamshire
Gloucestershire	Staffordshire
Warwickshire.	

For the purpose this public version of the report, the authorities have been given fictitious names: Allshire, Boothshire, Cromshire, Drumshire, Eastshire, Fulfordshire and Glenshire.

Each authority was asked a series of questions covering library use, service provision and financial data. It proved challenging for the participating authorities to collate all of the necessary information, and inevitably, in some cases, information is lacking.

In order to compare authorities, much of the data referred to is quoted per thousand population, which is the standard presentation used by CIPFA. However, it is worth underlining that such measures take no account of population density or distribution, or the geographical size of each county. It is therefore important to consider, for example, that the per 1,000 population figures of counties with smaller populations may appear to be ‘inflated’, because of costs associated with providing library services irrespective of the population served. Similarly, in counties with a lower population density, the expenditure per 1,000 population figures may be relatively higher than in other authorities, because of the resource implications of serving dispersed communities.

CIPFA provides overall population density data for whole counties, but the distribution of population within the county cannot be inferred from this. Notwithstanding these limitations, a range of criteria has been used to select the benchmarking group in this exercise, in terms of similarities in both geography and library outputs (*Appendix A*).

## Visits

**Figure 1 Visits and issue figures for 2002-03**

Authority	Visits per 1,000 pop	Rank	Method	Book issues per 1,000 pop	Rank
Allshire	4,401	6	Manual sample	5,863	7
Boothshire	5,726	1	People counters	6,321	1
Cromshire	5,362	2	Manual sample	6,094	5
Drumshire	4,285	7	Manual sample	5,918	6
Eastshire	4,796	4	PC & manual sample	6,211	2
Fulfodshire	5,013	3	People counters	6,191	4
Glenshire	4,665	5	People counters	6,196	3

Of the group, Boothshire has the highest number of visits per 1,000 population. The authority has automatic people counters in all of their static libraries, whereas many of the other authorities were still using manual counts in 2002-03. Visit figures are also high for Cromshire, which reported sample manual counts (for four, week-long periods), and Fulfodshire and Glenshire, where people counter figures were submitted. Of the authorities with the lowest figures, Allshire and Drumshire reported manual sample counts (for four, week-long periods) to CIPFA, although Allshire does have people counters in 11 of its busiest libraries, out of a total of 54. Eastshire has automatic counting in around 60% of their libraries, through a combination of people counters and stock security equipment. In the remaining libraries, visitors are counted manually on a sample basis. Eastshire reports an aggregation of these figures to CIPFA.

### Accuracy of visitor figures

It is widely accepted that people counters tend to over-count, and it may not be a coincidence that of the group, those authorities reporting automatic counts tend to have higher visit figures than those reporting manual counts. However, Allshire suspects, from manual checks of its people counters, that visits tend to be under-counted by automatic counters. In addition, manual sample counts may be inflated because the grossing methodology does not take into account closures and other variations.

Of the group, Drumshire is the only authority without any automatic counting of visits. In Allshire, Boothshire, Eastshire, Fulfodshire and Glenshire, automatic counters are checked/calibrated, although this process appears to be most frequent in Allshire. This said, in the authorities reporting people counter data, no authority mentioned any routine adjustments being made in light of manual checks, although all authorities claimed that any anomalies would be looked into.

Possible causes of under-estimation of visit numbers include:

- High reliance on manual counts, with inevitable degree of human error, especially at busy times – this is an issue for all authorities relying on manual samples.
- Visitors to library events out of opening hours do not tend to be counted unless there is a people counter.

- People counters missing visits – e.g. in Allshire, research has indicated that some 17% of visitors to the busiest library are not counted by the people counter, mainly owing to the location of the counter, which only registers people entering the main collections in the library, not those just entering the building to return or renew books. Another source of inaccuracy is children being missed by the beam.

Sources of over-counting include:

- The counting of visitors to other services located in libraries. This does not appear to be an important consideration for the libraries involved in this exercise, but is likely to become more of an issue as the number of multi-agency services increases. In Allshire, it is felt that most of these visitors are not counted, as other entrances are in place, and where this is not the case, the numbers involved are negligible. In Boothshire, there is only one library where this issue applies. Drumshire and Glenshire felt that this was not an issue for them, since none of their premises operate as single entrance multi-service centres.
- Counting of visitors to non-library events held in libraries. In all cases, such people would be counted, as there is no way of distinguishing them from library users. In Allshire, this is mainly an issue for the main library, but the numbers involved are thought to be negligible.
- Inherent problems with the location of counters, such as reflection on detectors or people triggering the counter more than once.

### Issue figures

Issues figures were not discussed during the interviews, but they have been included in Figure 1 for reference and to provide an indicator of the level of library use in each of the authorities.

### Premises

**Figure 2 Premises costs and tenure details**

Authority	Premises costs per 1,000 pop	Rank	Proportion rented	% rented	No of libs in shared premises	% shared	Division of costs (see below)
Allshire	1,567	3	c.15/54	c. 28%	8	15%	Varies
Boothshire	1,644	1	7/33	21%	8	24%	Varies
Cromshire	1,484	4	19/41	46%	12 see below	29%	Resource charges
Drumshire	1,623	2	14/45	31%	10	22%	By floorspace
Eastshire	1,452	5	13/61	21%	14 see below	23%	By floorspace
Fulfodshire	1,319	6	4/43	9%	9	21%	Agreed formula
Glenshire	1,160	7	7/40	18%	2	5%	Equal share

In all authorities, a proportion of premises are rented/leased or shared with other agencies. The implications of this, in terms of both premises expenditure and the division of costs, were explored during the interviews with authorities.

### Definition of premises costs

CIPFA guidance notes state that premises costs associated with offices in separate local authority accommodation for multi-service directorates should not be included under premises. In

Boothshire, however, such offices have been included in the figures supplied to CIPFA, so the quoted figure is not directly comparable with those of other authorities. This perhaps contributes to the authority's high level of premises expenditure. No other authorities reported this to be the case.

### **Multiple occupation**

The above table illustrates that all authorities have shared buildings, although to varying extents. The majority of buildings are shared with only one other agency, although this is now beginning to change with multi-service centres.

Arrangements for the apportionment of costs vary. In Allshire, utilities are metered separately for each agency, except those buildings shared with Education, where a recharge is made at the end of year, based on an agreement (which is not based on floorspace). Allshire is of the opinion that, on balance, they benefit from shared buildings, in terms of economies of scale. In Boothshire, there is no standard apportionment of costs between agencies, which have to be negotiated in each case. In terms of the main library, which is in a shared building, the library pays a charge to the county council, for the premises and utilities, which, it is felt, is somewhat inflated.

In Cromshire there are approximately 10 learning centres, which are not funded directly from the library budget, but are viewed as an integral part of library business. There is no charge for rent, but there are charges for resources. Two library buildings also accommodate outside agencies, which are charged a rent (which includes utilities) by the library service.

In Drumshire, the library entrance is separate in all shared buildings. Where the building is owned by the authority, the premises costs are charged to a single cost centre and then recharged to the occupying agencies, based on the floorspace occupied.

In Eastshire, there are 14 dual-use buildings and 11 others that share sites. Proportionate costs in shared buildings are calculated according to the floorspace occupied.

In Fulfodshire, costs are divided based on an agreed formula, which it is felt gives a fair division. The arrangement varies between premises.

In Glenshire, one library is in the same premises as a museum, and the associated costs are divided equally between the two. Another building is shared with a parish council, although it is not known how costs are apportioned in this case.

### **Tenure**

In all authorities, the majority of buildings are owned, although the proportions vary. Allshire does not feel that renting of some properties has significant implications for the costs reported to CIPFA, except in terms of capital assets. Both Boothshire and Drumshire feel that renting can be both advantageous and disadvantageous, somewhat depending on the terms of the lease and suitability of the building. Cromshire expressed the opinion that the library service tends to benefit from renting properties, as some of them are below market rent.

There does not appear to be a relationship between the proportion of rented buildings and overall premises costs.

### Types of premises costs

In owned buildings, Allshire and Boothshire work on the basis that ‘tenant’ costs, such as internal ‘wear and tear’ repairs are paid for by the library service (and appear in the CIPFA return in premises costs), and ‘landlord’ costs, such as external maintenance, are covered by the county council. These are recharged to the library and included under premises costs in Boothshire (a considerable sum), but under support services in Allshire (negligible for 2002-03). In addition, in Boothshire, a considerable charge is received for accommodation in the Shire Hall complex and for other management/administrative aspects of the library service, and this is included in premises costs in the CIPFA return.

In Drumshire, Eastshire, Fulfodshire and Glenshire all premises costs seem to fall directly to the library service, and presumably appear under premises costs in CIPFA. Cromshire mentioned that longer-term, planned maintenance, such as library refurbishment would be included under capital expenditure. In Glenshire, with shared buildings, the arrangements vary depending on each of the partnerships, ranging from the library covering all running costs, to a ‘tenant’ and ‘landlord’ situation, as outlined above. In Eastshire, the library service instigates maintenance in collaboration with their environment department. The service has special dispensation to choose their own repairers – they do not have to use county council services.

Only Drumshire mentioned the premises costs associated with support departments, which they include under support services expenditure in the CIPFA return. It is not known whether other authorities are apportioned these costs.

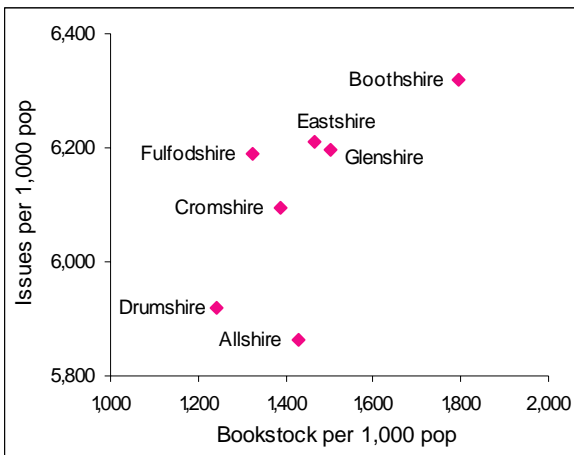
### Stock

**Figure 3a Bookstock and acquisitions for 2002-03**

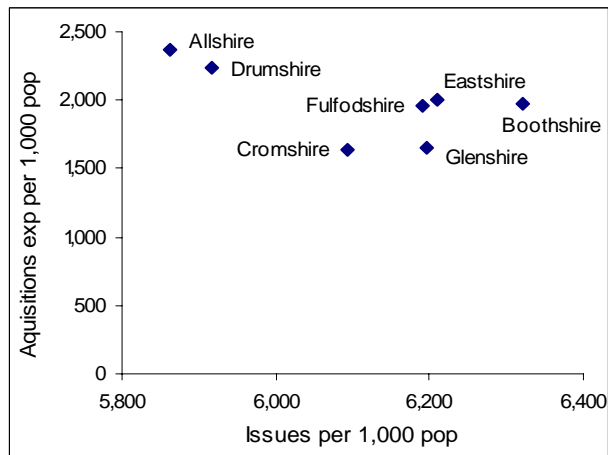
Authority	Bookstock per 1,000 pop	Rank	Book acquisitions per 1,000 pop	Rank	Total materials acquisition exp per 1,000 pop	Rank	Av. cost per book	Rank
Allshire	1,427	4	223	2	2,373	1	7.56	4
Boothshire	1,794	1	232	1	1,976	4	7.52	5
Cromshire	1,387	5	117	7	1,639	7	9.94	1
Drumshire	1,244	7	170	5	2,241	2	8.83	3
Eastshire	1,465	3	223	2	2,002	3	6.89	7
Fulfodshire	1,322	6	187	4	1,953	5	7.47	6
Glenshire	1,503	2	127	6	1,651	6	9.13	2

Within the benchmarking group, there is a relationship between book acquisitions and total acquisitions expenditure, as we would expect. However, there is no clear relationship between total bookstock and acquisitions rate, and bookstock and acquisitions expenditure, which is somewhat surprising. Looking back at Figure 1, there does not appear to be a link between book issues and acquisitions, but, with the exception of Allshire, there is a relationship between book issues and bookstock (Fig 3b). There is no relationship between book issues and acquisitions expenditure, which again, is surprising (Fig 3c). However, one of the participating authorities has suggested that this finding may be explained by authorities with low issue figures increasing their expenditure on books. The cost per book data lends some support to this suggestion, in that the authorities with lower issues tend to have higher cost per book figures.

**Figure 3b Bookstock against issues**



**Figure 3c Issues against acquisitions expenditure**



**Stock counts**

In Allshire, Cromshire and Drumshire, a full manual count is undertaken on an annual basis and items on loan are counted using the library catalogue. Whilst Cromshire felt that these figures are reasonably reliable and consistent, with anomalies being checked, Drumshire raised the issue of long overdue (and unlikely to be returned) stock being counted as on loan. Whilst Allshire takes into account stock not recovered after being overdue and stock exchanges, it is felt that the manual approach to counting stock is not particularly satisfactory, and stock counts could be provided by the library management system in the future.

Boothshire, Eastshire and Fulfodshire’s figures reported to CIPFA originate from library management systems. Boothshire no longer conducts manual stock counts and no account is currently taken of stock shrinkage. Fulfodshire carry out a manual stock count, but this is not checked against the catalogue. In Glenshire, annual manual counts are used to update the LMS data.

Apart from the concerns raised by Drumshire regarding the accuracy of LMS stock records, no authorities raised concern regarding the reliability of their stock data, beyond inherent human error in the counting of stock.

None of the authorities interviewed conducts a stock census, above and beyond checking specific areas/anomalies, e.g. books not issued for a specific period of time.

**Types of stock**

Allshire does not hold any special collections, but they do have an extensive reserve stock, which is included in the CIPFA stock figure. The majority of fiction is purchased by standing order with suppliers, and fiction, non-fiction and audiovisual acquisitions are linked to top ten ratings. They are beginning to reduce non-fiction holdings in smaller libraries.

In Boothshire, there is a policy to stock paperbacks in preference to hardbacks and approximately 60% of stock is in paperback. This has implications for book spend (ranked fourth in this group), acquisitions (ranked highest of the group), and average cost per book (which is the third lowest of the group).

Cromshire has a significant local history collection, which requires special preservation. They are beginning to stock paperbacks in preference to hardbacks in smaller libraries, but their average cost per book was the highest of the group in 2002-03.

In Drumshire, the policy is to buy 55% of fiction by volume in paperback, and it is thought that this threshold is probably being exceeded. The authority holds a number of special collections, largely local history.

Fulfodshire does not have any special collections. A move towards purchasing more paperbacks has brought down the average cost per book (second lowest in the group).

Glenshire has a 'Fastback' collection, usually special stock in hardback, e.g. bestsellers, which may be borrowed for one week only. It is possible that these collections help to increase the authority's issue figures, which are the highest of the benchmarking group. They also have a 'Quick Choice' range, which largely comprises modern fiction and new authors in paperback, but also includes CDs, DVDs, videos and graphic novels.

### **Allocation of bookfunds**

In all the participating authorities except Fulfodshire, the overall book fund is largely dictated by funds for previous years, and, in Allshire, the cost of maintaining contracts with suppliers. In Fulfodshire, the budget is reviewed annually and is largely based on issues.

In terms of allocation to types of stock, in Boothshire and Fulfodshire, this is based on issue figures, and for children's books, there is a commitment to spend at least the equivalent proportion of the budget on children's stock, as the proportion of children in the population. This is also the case in Glenshire, and 20% goes towards stock to enable social inclusion, again based on population percentages. In Fulfodshire, a proportion is held centrally for meeting standing orders. In Eastshire, an 'optimum stock' approach is taken, which is calculated on the basis of issues and lifetime of stock.

In terms of AV stock, in Boothshire, the budget is controlled by the income generated. This has implications for the type of AV stock purchased. In Glenshire, some AV stock (videos, DVDs) was initially bought from a start-up fund; this is now self-funding and generates income, which is put back into service development.

### **Stock selection**

In the majority of authorities, stock selection is centralised, although the number of staff involved varies.

In Allshire, in 2002-03, there were three teams (one per district), and each team comprised four librarians. (There is now one team of three and a review team for children's acquisitions). A large proportion of stock is purchased through standing orders with suppliers.

In Boothshire, there are six teams, each with three or four members of staff. No stock selection is outsourced to suppliers. This is perceived to be an efficient, cost-effective system because stock selection is co-ordinated county-wide, duplication is avoided and members of the teams are frontline staff with links to customers.

In Cromshire, stock selection involves 3.3 FTEs for adult stock and 4 FTEs for junior stock. No stock selection is outsourced to suppliers, but some stock is received on standing order, notably reference titles.

In Drumshire, new stock is selected by teams. Each team covers a specific area of stock, such as adult fiction, and involves 3-4 people.

In Eastshire, local stock selection teams feed into county level teams. There is a strong co-ordination of stock buying, with a trend towards more stock centralisation. There is no out-sourcing of stock selection to suppliers.

In Fulfodshire, stock selection is not centralised in the sense of being undertaken by Bibliographic Services, but it involves three teams, led by a county specialist. No stock selection is outsourced to suppliers.

In Glenshire, stock selection is centralised at library headquarters, and involves six members of staff each for adult and children's stock. Very limited stock selection is outsourced to suppliers – only really spoken word and large print. Some stock is received by standing order, mainly reference titles.

### **Local freedom to purchase stock**

The facility to purchase stock locally varies.

In Allshire, there is no local freedom to purchase stock, except newspapers and periodicals, which are locally managed, and for some projects.

In Boothshire, there is some ability to buy books locally, in line with council policy to support local communities, but this is very limited, at an estimated 2-3% of acquisitions, concentrated in the area of local studies.

In Drumshire, the majority of stock is purchased centrally, but some replacement stock, e.g. purchased as a result of stock revision, is bought at district level.

In Eastshire, materials funds are devolved to the five library groups or divisions. Whilst materials funds are not, as such, allocated to individual libraries, library staff can have an input to the stock purchased.

In Fulfodshire, bookfunds are devolved to portals (of which there are five, rather like divisions). Branch libraries are able to make suggestions regarding acquisitions.

In Glenshire, there is no local freedom to purchase books, except for local studies material, but again, branches can make suggestions.

### **Stock purchased from funds other than bookfunds**

In all but one authority, stock is sometimes purchased from funds other than the stock budget. Examples include:

In Allshire, stock is sometimes purchased from donations and other funds. Such expenditure has been included in the CIPFA return as materials expenditure.

In Boothshire, stock purchased for new libraries (a negligible amount) appears in the CIPFA return either as capital expenditure, or in revenue expenditure. Some stock may be funded through planning gain, but this would not have featured in the CIPFA return in 2002-03. In terms of stock acquired in addition to the bookfund (e.g. from capital projects), Boothshire does not include this expenditure under materials, but as capital spending.

In Cromshire and Drumshire, stock is sometimes purchased from partnership funding such as Sure Start, and Cromshire added that initial core stock for their new libraries came from capital funds.

In Eastshire, the authority's Medium-term Financial Strategy has provided a major investment for stock. Stock is also sometimes purchased through external funds, such as the Babies Need Books scheme.

In Fulfodshire, additional money was acquired in 2002-03 for library stock (shown under materials expenditure figures in CIPFA), and some stock was purchased from VAT rebates.

### **Stock policies with implications for transport**

All participating authorities, except Drumshire, have a 'return anywhere' policy, whereby books, and frequently AV materials may be returned to any library, and are then transported to their 'home' library. This has implications for the volume and frequency of stock movement. A 'return anywhere' policy was subsequently implemented in Drumshire in 2003-4.

Boothshire's policy is known as *Not at Home*. In addition, most new stock enters an automated stock rotation system, which again adds to the amount of stock moved around the county.

Allshire has a similar return anywhere policy, but it is not publicised, and it is not felt to have significant implications for the volume of stock movement. Customers are encouraged to return income-generating stock to the issuing library. An estimated 95% of stock is rotated, but as yet, this is not automated.

Cromshire's policy, which includes income-generating stock, is estimated to have a significant impact on the van delivery service. Fulfodshire's policy also includes income-generating stock, and they actively promote the facility to return stock to any library. The authority has a large programme of stock rotation involving all libraries.

Drumshire did not have a return anywhere policy in 2002-03. The level of stock transfer is dictated by the stock rotation policy of an optimum of 13% per year.

Eastshire has a policy of 'whole network borrowing'. Stock rotation is based on rotas, which are currently under review.

Glenshire's stock circulation programme involves rotation within groups of similar libraries.

### **Stock distribution**

In all authorities, new stock distribution is managed centrally, and in all but one case, stock originates from one central point. Allshire is slightly different from the rest of the group, in that principle suppliers deliver to the six main libraries, which then act as distribution points. This does not include AV stock, however, which is delivered directly to libraries and is not rotated.

In Allshire, there are daily deliveries to all major libraries (34 out of 59), and deliveries twice a week for smaller libraries.

In Boothshire, there are daily deliveries to libraries (if open), via three transport routes. The service is provided via a centralised hub where stock and other items are re-sorted for delivery the next day.

In Cromshire, there are three vans, each covering a different area. Deliveries are made daily to larger libraries and at least three times per week to smaller libraries. It is felt that whilst this system works reasonably well, there is an increasing amount of stock in transit, which has implications for transport costs and request satisfaction times.

In Drumshire, stock distribution is carried out from two central points, and deliveries are made daily to larger libraries and 2-3 times per week at smaller libraries.

In Eastshire, major libraries receive 5 deliveries per week, large and medium 4 deliveries per week, and the smallest, 2 deliveries each week.

In Fulfodshire, there are three delivery routes and all libraries receive daily deliveries, which has helped to improve request times. New stock is distributed from a central point (Bibliographic Services), although the possibility of delivering directly to libraries is being investigated.

In Glenshire, deliveries are made daily to the main libraries and 2-3 times per week to the smaller libraries. Like Cromshire, this authority also raised the issue of the length of time stock spends in transit.

## Transport

**Figure 4 Transport expenditure and vehicles operated**

Authority	Transport exp per 1,000 pop	Rank	Mobiles	Delivery vans
Allshire	250	4	9 (inc. reserve vehicle)	3
Boothshire	322	3	5 + 1 community services vehicle* + 1 trailer	7
Cromshire	233	5	7 (inc 2 for residential homes)	3 + 1 spare
Drumshire	613	1	13	3
Eastshire	213	7	8 (inc. relief vehicle)	6
Fulfodshire	351	2	13 (inc. relief vehicle & SLS mobile)	3 + 1 gen. purpose vehicle
Glenshire	225	6	7 (of which 4 = traditional)	2

\* The community services vehicle serves housebound clients.

Of the group, Drumshire's spending on transport stands out from the rest of the group. Although this authority operates an extensive mobile library service, it is not clear why their expenditure is twice that of most of the other authorities. Fulfodshire has the second highest transport expenditure, and like Drumshire, is operating a relatively large mobile fleet. In addition, Fulfodshire makes daily deliveries to all their libraries, which will contribute to the higher level of expenditure. The provision of transport varies between authorities, although all have a mobile

library service and operate a van delivery service for stock. It would be useful to have a measure of the area over which transport provision extends, but this would be difficult to calculate. Some of the counties in the benchmarking group are considerably larger than others, which must, in turn have a bearing on transport provision and costs.

In addition to mobile libraries and stock delivery:

Allshire also operates transport to bring clients to libraries, provides services to housebound readers (individuals, and residential homes via the Link Service), and makes deliveries on behalf of museums. All of the associated expenditure is included in transport expenditure supplied to CIPFA for 2002-03. (This is no longer the case, as delivery vehicle expenditure is now included under support services.)

In Boothshire, transport is provided for Heritage services, services to housebound readers (using the community service vehicle), and occasionally, the library service hires minibuses to transport clients to libraries. Library vehicles also transport equipment and post for the directorate as a whole (Libraries, Heritage and Trading Standards). It should be noted that in Boothshire, the costs associated with leasing mobiles are managed at directorate level, and (contravening CIPFA guidelines) are not included in the return for the library service.

In Cromshire, a doorstep service is provided to housebound readers, and very occasionally community education materials are transported. Eastshire also provides a housebound service, but this uses private transport.

In Drumshire, deliveries are also made to deposit collections at residential homes, and to one museum and the County Record Office. A housebound service is operated by staff and volunteers, but this uses private transport and hire cars.

Fulfodshire makes deliveries on behalf of museums and the Directorate IT unit, and offers a housebound service staffed with volunteers (who receive mileage payments) and using mobiles for delivery to some housebound readers. In 2002-03, the authority had two special vehicles to serve the housebound, but these are now coming out of service. The authority also makes deliveries of deposit collections to various agencies.

Glenshire does not operate any additional transport, although one of their mobiles is a Home Link service, providing loans to residential homes, and the Share-a-Book mobile provides a service targeted to support social exclusion needs for families and children.

### **Mobile library services**

All authorities felt that their mobile library service has a good coverage of the county, and primarily covers rural areas. In addition, in Allshire, one mobile primarily covers urban areas, although 280 villages are also served, each with 1-5 stops. Of the seven mobiles in Glenshire, four are rural mobiles. In all of the authorities, the vast majority of routes are operated on a fortnightly basis.

**Figure 5** Details of mobile library services

Authority	No of routes	No of stops	Duration	Frequency of route reviews	Visits	Issues
Allshire	93	973	10 mins	When needed	109,885	469, 771
Boothshire	36	440	Varies	Continuous	66,235	265,413
Cromshire	91	568	20-30 mins*	When needed	89,115	313,840
Drumshire	110	1700	5 mins +	Continuous	c. 180,000	c. 840,000
Eastshire	63	c. 1400	5 mins –3hrs	Annual	101,972	488,072
Fulfodshire	103	965	Varies	Ongoing	163,140	854,383
Glenshire	40	649^	Varies	Annual	46,474	279,988

\* Calculated by a formula, and is dependent on the level of business.

\*\* Figures for 2003-04.

^ Excludes SLS.

### Shared transport

Several of the authorities included in this exercise make deliveries on behalf of other agencies, although the extent of this provision varies considerably, as outlined above. In Allshire, transport (delivery vans and transport for Library Services for Education) is provided to a neighbouring county, under a joint arrangement, but all of the associated costs are included in the CIPFA return for Allshire. In Boothshire, the Schools Library Service and Heritage buy into library transport services, which totals around 90 days per year. Income from this work is shown under miscellaneous corporate income in the CIPFA return, whilst the associated expenditure is included under agency services. Transport is also provided for Babies Need Books deliveries. Fulfodshire makes deliveries for museums (for which income is received), and for IT, countryside and property services. The full cost of this transport is borne by the library service, and included in transport costs.

In Cromshire, Drumshire, Eastshire, and Glenshire there is no significant provision of transport to any other service for the year 2002-03.

### Transport costs

For Allshire in 2002-03, transport costs included the direct costs associated with the mobile libraries and delivery vans (now part of directorate transport, so delivery van costs are now included under support services expenditure).

In Boothshire, there is a directorate transport service, which the library manages. Fleet management is provided centrally by the authority, and the charge is included in the transport expenditure reported to CIPFA. The costs of providing services for SLS appear under agency services, and income under miscellaneous corporate income.

In Cromshire, the county council handles very little fleet management. The library service is responsible for (and includes in transport expenditure in the CIPFA return) research and development, vehicle purchasing and maintenance. Insurance is handled separately and appears under support service costs. They have worked with a neighbouring county for research and development support and to take advantage of economies of scale, which has proved successful.

In Drumshire, fleet management and vehicle maintenance is provided by the county council through the Environmental Services department, but costs are recharged to the library service and appear within transport costs in the CIPFA return. Travel and subsistence paid to library staff for any reason also feature within transport costs. Travel allowance costs amount to one quarter of travel expenditure, and a further 3% is accounted for by the cost of deliveries on behalf of another authority. This may help to explain the high rate of transport expenditure in Drumshire, although in the absence of details regarding the breakdown of transport expenditure from other authorities, it is not possible to confirm this.

In Eastshire, transport provision is managed by the environment department, which handles fleet management for the entire county council. This includes, the commissioning and design of new vehicles and vehicle maintenance. The associated costs are included under transport costs in the CIPFA return.

In Fulfodshire, fleet management is handled by the county council. The lease includes vehicles, maintenance and replacement costs, which totals approx £1,000 per month for each large vehicle. The library service has a transport manager, whose costs appears in employee costs. The transport manager also manages the county's 'Jobs Bus' on behalf of the county council.

## Staff

**Figure 6 Staffing and staff expenditure in 2002-03**

Authority	Staff per 1,000 pop	Rank	Staff exp per 1,000 pop	Rank	FTEs : staff number	Ratio	% prof staff
Allshire	0.36	6	7,765	3	230 : 400	0.58	24.7
Boothshire	0.48	1	8,894	1	c.250 : 420	0.60	22.3
Cromshire	0.30	7	7,219	6	182 : 338	0.54	23.9
Drumshire	0.44	2	7,802	2	326 : 716	0.46	24.9
Eastshire	0.40	3	7,466	5			24.5
Fulfodshire	0.39	4	6,789	7	316 : 540	0.58	18.0
Glenshire	0.38	5	7,627	4	218 : 374*	0.58*	20.8

Note: The lower the ratio of FTEs to staff numbers, the higher the proportion of part-time staff.

\* For 2004-05.

Looking at the rankings, with the exception of Fulfodshire and Allshire, there is a clear relationship between staff per 1,000 population and staff expenditure, as we would expect. In Fulfodshire, there is perhaps a link between low staff expenditure and the relatively low proportion of professional staff. However, without more information, assumptions such as this cannot be relied upon. It is very difficult to compare authorities on the basis of staff and pay structures, as there is considerable variation between them, and several authorities have undergone staff reorganisation in recent years. In addition, it seems likely that the definition of 'professional' staff varies between authorities. During interviews, few authorities were able to supply detailed information for this part of the exercise. However, it is apparent that there are differences in the way in which staff costs are included in the CIPFA return, so the above figures should be treated with caution. Such differences were explored further in a seminar in the final stage of the project (p30-34).

### **Support staff**

In 2002-03, in Allshire, the library operated as a stand-alone department, having its own Human Resources (HR), administration and marketing, and the associated costs appeared in staff costs. This perhaps helps to explain the relatively high level of staff expenditure, although the figure for staff per 1,000 population does not support this. Central costs, such as ICT and Chief Executive appeared under support services expenditure in CIPFA. This is no longer the case, as the library receives an apportionment of departmental (Community Services) total for support services.

Boothshire has the highest staffing levels and staff expenditure. In this authority, in common with Eastshire, Fulfodshire and Glenshire, the costs associated with central/support staff, such as HR and administration (beyond core library headquarters staff, which appear in staff costs) are accounted for centrally, and do not appear in staff figures in the CIPFA return, but are included in support services. In Boothshire, it should be noted that the head of the library service, who also manages the customer service centre, has not been included in the staff expenditure figures, nor has any staff training expenditure. This is perhaps surprising, in view of the high level of expenditure.

In Cromshire, the library service is part of Education, Libraries and Heritage, which has its own human resources unit and finance advisor. The library service has its own administration and budget team, and the associated costs feature under staff costs. Above and beyond this, any other support provided by the county council is charged as central support costs.

In Drumshire, central staff which provide support to all services are recharged based on usage of staff time, or number of units processed. The cost of this support (including overheads) is shown under support services.

In Fulfodshire, support such as finance and HR is provided centrally and is included in support services. Each portal (or division) has its own member of administration staff, and there is a senior library managers' support team. The costs associated with these staff (around 10 people) are included in employee expenditure.

In Glenshire, support service expenditure includes executive costs, but does not include the staff costs of HR, administration and ICT.

### **Shift patterns and out of hours working**

In all authorities a significant number of libraries are open evenings and Saturdays, and in Boothshire and Fulfodshire also on Sundays. In Allshire, Boothshire, Cromshire, Drumshire and Glenshire, Saturday working attracts an enhanced rate of pay of 50%. In Drumshire, this may be subject to change during job evaluation, which is currently in progress. In Boothshire, Sunday working attracts special pay rates. Boothshire, Cromshire, Fulfodshire and Glenshire all have Saturday/weekend assistants, who tend to be paid a flat rate. No allowance is made for evening working in any of the authorities interviewed (before 8pm in Drumshire).

### **Other staffing issues**

All but one of the authorities interviewed raised the issue of the cost implications of staffing libraries based in more than one room or over several floors. In addition, Allshire raised the issue of staff costs associated with providing enquiry desks in their larger libraries. The authority is now reducing this provision.

Lone working presents a challenge for all authorities, and across the benchmarking group attempts are being made to keep it to a minimum. All of the authorities interviewed have a degree of lone working, although in Allshire, it is normal practice to double-staff such sites in winter evenings.

### Training costs

In all the participating authorities except Boothshire, training costs are incorporated into employee costs. In Boothshire they have not been included in the CIPFA return for 2002-03, as the training budget (to which the library service makes a contribution) is held centrally. Boothshire also noted that library staff are involved in the provision of training.

### Contribution to corporate objectives

All authorities interviewed said that library staff, particularly senior management, contribute to wider corporate objectives, but the extent is difficult to quantify. In all cases, contributions to wider corporate objectives are absorbed by the library service, and hence, the associated expenditure is reflected in employee expenditure in the CIPFA return.

Examples include:

In Allshire – Strategic management, enquiry staff in large libraries.

In Boothshire – Contribution to community and service plans, overview and scrutiny committees, external groups, projects, partnerships and area committees.

In Drumshire, all staff contribute to wider corporate objectives, but the level of involvement varies. It is estimated that 20 senior managers are heavily involved, ranging from the Director and Senior Management Team.

Eastshire estimates that at least 10 staff serve on departmental/corporate groups.

In Fulfodshire, staff are occasionally seconded for specific projects and partnerships.

In Glenshire, it is estimated that around 3 library staff contribute to Directorate work, such as performance management.

## Services

### Agency services

Figure 7 Agency services provided by each authority

Authority	Schools	Prisons	Hospitals	Other
Allshire	✓	✓		
Boothshire	✓			
Cromshire		✓		
Drumshire	✓	✓		
Eastshire	✓	✓	✓	✓
Fulfodshire	✓	✓		✓
Glenshire	✓	✓		

In Allshire, there is a joint arrangement with the Prison Service for the provision of library services. The library service pays for staff and receives a capitation from the Prison Service for stock, which it matches from its bookfund. The associated costs are only shown under agency services in the CIPFA return and do not, therefore, feature in revenue expenditure. Library Services for Education (LSE) operates as a break-even trading unit, which relies on subscriptions from schools and the library service also makes a contribution. Income from the provision of LSE is included in miscellaneous corporate income. Schools in the county are not obliged to buy in to the service.

In Boothshire, the Schools Library Service is managed by the library service and there is a budget to cover overheads and the cost of premises, amounting to around £43,000. Staff and materials costs are recovered from charges made to schools. In effect, this activity is cost-neutral. (The county also now provides SLS to part of another county, but this was not operating in 2002-03).

In Cromshire, the library provides services to two prisons. The library service provides staff and stock, but these are refunded by the Home Office. The costs appear under agency services expenditure in the CIPFA return. Services to schools are not currently covered by the library service, but this is likely to change in the future.

In Drumshire, library services to prisons are provided under contract to the Home Office, and the SLS is operated jointly with the city library service, on a fee-paying basis. Secondary schools in the county have delegated arrangements for SLS, such that they do not have to buy in to the service, whereas primary schools have devolved arrangements, whereby any money not spent on SLS is reclaimed.

Eastshire provides a prison library service on the same basis as Allshire, except that the Prison Service finances some staff. It also provides library services to a large hospital, again on a similar basis.

In Fulfodshire, the Schools Library Service is self-financing. Primary schools have to buy in to the county's SLS, but secondary schools are not obliged to. School library services are also provided for the neighbouring unitary, and to some private schools. Library services are provided to six prisons, for which a capitation is received for stock. The library service invoices the prison service for staffing, although neither income or expenditure associated with providing services to prisons are shown in the CIPFA return, as the net effect is nil. The authority also operates RNIB Reading Services for Social Services, for which income is received.

In Glenshire, the schools library service (LSE) is operated on a self-funding basis, although the senior manager of the service is a member of library staff. Regarding services to prisons, the library service provides a prison librarian, for which income is received from the prison. The prison is responsible for overheads and makes a contribution towards stock.

### **Special services**

Special services provided by Allshire include:

- Housebound Service (with WRVS) – costs covered under transport
- Link vehicle – provides services to residential homes, and is staffed by library staff
- Videophones – library service pays for line charges for seven videophones around the county

- The library service also makes a contribution to the Omni service – which brings housebound people to libraries—the associated costs are shown under transport in CIPFA
- Support for Workers Educational Association (WEA) – does not involve costs
- Provision of collections for reading groups.

In Boothshire, special services include a rural housebound service (partly staffed by volunteers and run in partnership with Age Concern) and a community services vehicle (KCS). The provision of special services is covered by a separate cost centre, managed at HQ, but the cost is largely charged to the library service and appears in CIPFA under relevant headings within revenue expenditure. The breakdown of these costs is not available.

Cromshire operates a housebound service, for which the staff costs are absorbed by the library service. This is mainly staffed by volunteers.

Drumshire offers a housebound service and deposit collections to homes and other institutions. The housebound service involves a combination of library staff, volunteers and some mobile library staff. The staff costs are included in employee expenditure in CIPFA. Other costs include mileage claims for volunteers and vehicle hire for library staff, both of which are reported to CIPFA in transport expenditure. Special services are also provided at the main library for visually impaired and disabled people. Staff costs are not distinguished, and special facilities are covered in other supplies and services expenditure.

Fulfodshire provides housebound services and services to residential homes. In 2002-03, there were two special accessible vehicles to provide services to residential homes, but these are now being replaced with deposit collections. As with other authorities, the housebound service involves library staff, but is mainly provided by volunteers.

Glenshire also provides a housebound service on much the same basis. In addition, a Home Link vehicle serves residential homes. Compared to the other authorities, Glenshire has a considerable number of housebound readers. At several of their libraries, each month there is a library club for housebound people, whereby clients are brought into the library (on a closed day) by volunteers or community transport.

### **Volunteers**

All of the authorities interviewed are assisted by volunteers, particularly in relation to housebound services. Although few authorities supplied numbers of volunteers, Fulfodshire felt that they have more volunteers than many authorities, Cromshire has in the region of 250 and Boothshire has over 100. In Drumshire, around 70 WRVS volunteers staff the housebound service, in addition to volunteers in other areas.

Although there are no salary costs associated with volunteers, there are potentially costs associated with management, training, subsistence and transport. In general, such costs are absorbed by library services, and included under the relevant heading in the CIPFA return.

### **Joint arrangements**

Aside from joint arrangements already discussed in relation to agency services and special services, the following joint arrangements were mentioned in relation to 2002-03.

In Allshire, there are joint arrangements with a neighbouring county, by which Allshire provides transport (delivery vans), prison services, ICT (library management system) and bibliographic services. The library service also provides prison and school library services on behalf of the city (unitary) council. With the exception of prison and school services, the associated costs are included in CIPFA expenditure figures. Other arrangements include a joint arrangement with the city council for a basic skills partnership (externally funded, but involving library staff costs and input from the bookfund) and a partnership with East Midlands Arts for the provision of a literary development officer, (partly externally funded, and half salary costs met by the library service).

In Cromshire, a number of community-based projects were mentioned such as Sure Start, for which grant income was received, and the library service contributed staff time, which was absorbed into employee costs.

In Drumshire, a number of joint arrangements exist between the county council and the city council. Costs are apportioned on an agreed basis. The lead party recovers the element of shared cost, plus an allowance for overheads. For joint arrangements led by the county, the costs are shown under the relevant areas in CIPFA. The recovery of costs is shown under provision of library services to other local authorities. Where the city leads the arrangement, the recharge to the county is shown under third party payments.

In Eastshire, there are a number of Service Level Agreements for the provision of van deliveries, bibliographic support and the library management system, to the neighbouring unitary. Conversely, the unitary provides services on behalf of the county, in terms of special collections at the central library. It is thought that each authority funds the operation within its own areas of responsibility, (there is no third party payments expenditure in CIPFA, for instance). This contrasts with Drumshire's handling of income and expenditure generated on a similar basis.

In Fulfodshire, there are a number of joint arrangements in place. These include the provision of a range of surgeries – pensions, victim support, community police; nine partnerships with district councils to provide one-stop-shops, and several learning partnerships with local colleges and schools. There is also a Neighbourhood Management Initiative in part of the county, which enables additional mobile library time in the area, and funding for a neighbourhood worker, although this was not in place in 2002-03.

### **Contribution to services provided by county council**

In 2002-03 in Allshire, there were service shops in the larger libraries, for which income was received from the district council and chief executive (miscellaneous corporate income). However, one of these units provided county council information, so the library service had to pay a contribution to the overall cost. This is shown under salary costs in the CIPFA figures.

In Boothshire, the library service provides a customer service centre on behalf of the county council, which is funded at corporate level. It is thought that the costs of providing this service are absorbed into the direct running costs of the library.

Drumshire has a call centre run by the county council, for which the library service receives a charge (accounted for under other supplies and services).

In Eastshire, the library service provides county contact centres, which supply county council service information. These are staffed by library staff, and the associated costs are included in employee costs in the CIPFA return.

For Cromshire, Fulfodshire and Glenshire, this question was not applicable for the year 2002-03.

### Enquiries

It is difficult to achieve consistency in the counting of enquiries, particularly in terms of the definition of an enquiry. CIPFA provides a definition, but several authorities said that this remains a difficult area, and called for a more appropriate, comprehensive definition. It seems likely that authorities will be under-counting enquiries owing to other work pressures, although no authority felt that their figures would be particularly inaccurate.

In all authorities, enquiries are logged manually, but there are differences in the methods of counting, as detailed below.

**Figure 8 Methods of counting enquiries**

Authority	Full count / sample	'Phone enquiries included?	E-mail enquiries included?	Enquiries per 1,000 population	Rank
Allshire	Full	✓	✗	478	7
Boothshire	Full	✗	✗	895	2
Cromshire	Full	✓	✓	566	4
Drumshire	Sample	✓	✓	516	6
Eastshire	Full	n/k	n/k	509	5
Fulfodshire	Sample	✗	✗	708	3
Glenshire	Full	✓	✓	1,005	1

Notes: In Boothshire, web-based e-mails are included in the enquiry count. Customer service centre enquiries are excluded.

Sample counts are conducted according to CIPFA guidelines.

### Requests/reservations

Only Fulfodshire counts requests manually, based on a sample week. Allshire, Drumshire and Glenshire count requests manually on an ongoing basis, and record them on their library management system (except mobile library requests in Drumshire, which are included in the count, but not placed on the computer system). The remaining authorities use their library management systems to log requests on a continuous basis. None of the authorities raised any concern over the accuracy of these figures.

### ICT

In Allshire, ICT provision is managed centrally. Direct costs to the library service include the library management system, licences, maintenance and networks. Costs from the corporate centre, e.g. systems analyst and IT support, are included in support services. Consumables fall into the stationery budget (in other supplies and services in CIPFA). Research and development is part of the planning process and falls below the line in support services expenditure.

In Boothshire, the ICT budget is held by the Directorate and the cost to the library service has not been apportioned or included in the CIPFA figures. Thus, the figure for non-financial computing costs has been recorded as nil.

In Cromshire, the library holds its own IT budget. Procurement is carried out through the corporate IT department, for which the library service pays the actual costs. This unit also provides support, for which the cost is dependent upon the number of PCs.

In Drumshire, in 2002-03, the department had a dedicated ICT unit comprising a team of three full-time specialists covering libraries and heritage staff and users. The team worked closely with the corporate ICT management and technical support infrastructure.

In Fulfodshire, there is a senior member of library staff responsible for ICT and also a TALIS manager. IT support and procurement is provided from the Joint IT unit within Education, and the central IT unit handles lines and similar charges. Both of these costs are apportioned to the library service, and are included in the CIPFA return under computing costs. Consumables fall under the stationery budget and feature under other supplies and services.

In Glenshire, ICT is provided by the central IT unit, which is part of the resources department, and handles procurement, maintenance and support.

### **Equipment replacement cycle**

In Allshire, Boothshire and Glenshire the policy for replacement of IT equipment is 4 years, although in Boothshire, the policy differs between staff and public machines, the latter having additional funding from the county council. In Cromshire, there is no set policy, and in Drumshire, there is no set replacement rate either, but a five-year replacement rate had been established by 2002-03 (not as a policy, but as a successful outcome of bidding for funds to renew equipment). There is no guaranteed replacement rate for future years in Drumshire. In Fulfodshire, there is a rolling programme of equipment replacement, although the average replacement period was not specified.

### **Services available online**

All authorities now offer the ability to search the library catalogue, make requests and renew books online. In addition:

In Allshire, online services include checking ticket details, membership application, submission of book reviews, online booking of PCs, access to parish registers and census holdings.

In Boothshire, membership applications also can be made online.

In Drumshire, it is possible for library users to view their ticket details and use the *Ask a Librarian* service online.

In Fulfodshire, it is possible to make an application to join, send an enquiry, make online subscriptions, and check if items are awaiting collection.

In Glenshire, some reference material has been made available online, and may be accessed remotely. It is also possible to join online.

Few authorities were able to quantify the percentage of traditional services that have now been automated, but none of the participating authorities could think of an example of where a service has been completely automated.

Where possible, authorities are measuring the usage of services available electronically. In Boothshire, Drumshire and Fulfodshire, library management systems provide details of the percentages of renewals transacted over the internet and through call centres (where applicable), and requests made via the internet. Allshire records web hits using *Webtrends*, and overall usage of the web OPAC is also measured (although it is not currently possible to differentiate between the range of online services).

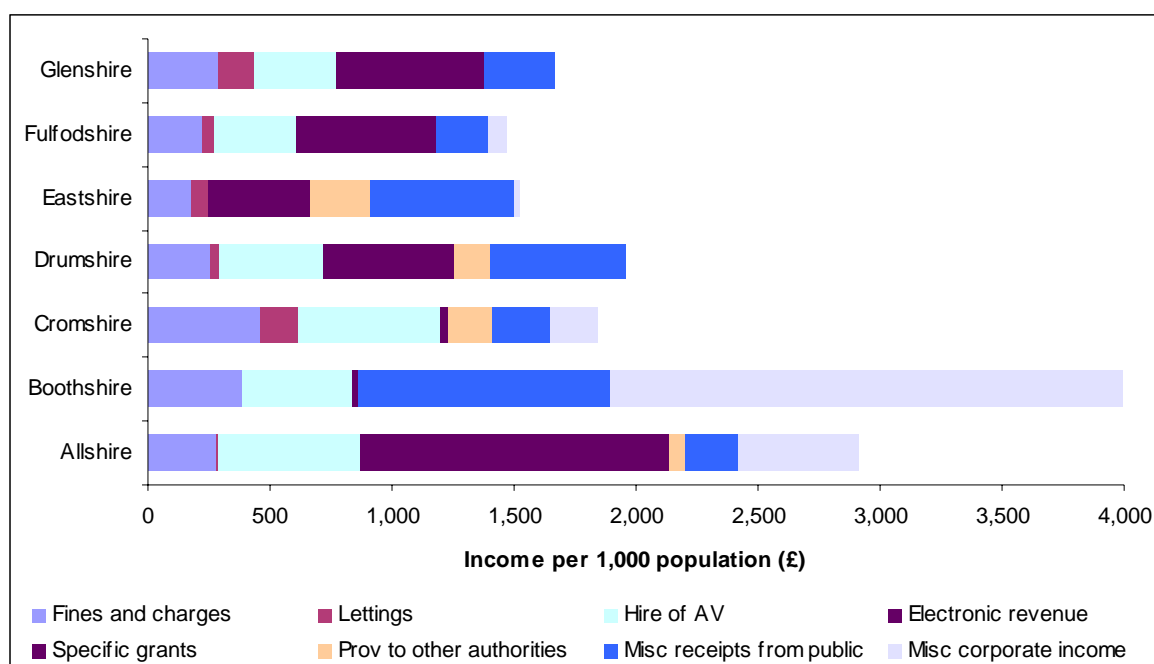
In Cromshire, Eastshire and Glenshire, usage of online services is being monitored, but details were not available.

### Income

In all authorities, the vast majority of income accrues to the library service. In Allshire and Cromshire, no income is ring-fenced for a specific purpose, but in all other authorities some income will have been ring-fenced for the year in question, typically income from AV materials. In Boothshire, Drumshire, Glenshire and Fulfodshire, income-generating AV material is self-financing, although in Glenshire and Fulfodshire, all associated income has not necessarily been ring-fenced – in Glenshire, for instance, profit is not ring-fenced. Similarly, in Eastshire, the AV budget is offset by income, although it is completely self-financing. Eastshire also had ‘incentive bonuses’ for individual libraries generating a certain level of income from room lettings, although this is no longer the case.

Other examples include: In Boothshire, income from fines stays within the library service. In Fulfodshire, the ‘Jobs Bus’ provided on behalf of the county council is self-financing, and in Drumshire, surplus income in respect of the Schools Library Service is retained in the service for future development.

**Figure 9 Breakdown of income per 1,000 population, for 2002-03**



Notes: In Eastshire, income from the hire of AV materials is included in miscellaneous receipts from the public. Boothshire’s grant income has been included in miscellaneous corporate income.

### **Grant income**

Four authorities recorded income from specific grants for 2002-03. Of these, Allshire's was considerably higher than the other authorities. For the year in question, this has been attributed to New Opportunities funding for the People's Network.

Drumshire has included receipts from the Prison Service for library services to prisons, amounting to 8% of total grant income, which other authorities may be including under miscellaneous corporate income.

Fulfodshire's grant income largely comprises New Opportunities funding and funding for Sure Start.

### **Miscellaneous corporate income**

Most authorities found it difficult to identify exactly what miscellaneous corporate income comprised in 2002-03. Of the group, five out of seven authorities reported having miscellaneous corporate income (Eastshire's is too negligible to be shown in Fig 9). Of these, Boothshire's income is particularly high. In this figure has been included: contributions from the county council for the SLS; contributions to Babies Need Books from the Education Department; and two large sums, one for the development of the People's Network and one for the provision of a customer service centre. Conversely, the county's figure for grant income is nil. This situation has arisen because of difficulties in separating grant income and reimbursement income. That is to say, the figure given is not directly comparable with other authorities, where at least some of the above components would appear as grant income.

Allshire's miscellaneous corporate income is also relatively high. Included in this figure are charges to Library Services for Education for accommodation and towards staffing, funding from the Education Department for initiatives, such as homework clubs, and some grant income for small projects. Income from the sale of furniture and vehicles also contributes to this figure.

In Cromshire, miscellaneous corporate income comprised county council funding for the provision of a local government information service at Shire Hall. (This no longer exists).

### **Income from fines and charges**

Fines and charges for all English and Welsh library authorities are detailed in a report by the Sheffield Information Organisation (SINTO)<sup>1</sup>. For comparison, selected charges are outlined in the following table, together with income generated from fines and reservation charges.

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<sup>1</sup> **SINTO** (The Sheffield Information Organisation) 2003 *Fines and Charges in Public Libraries in England and Wales*, 16<sup>th</sup> Edition, June 2003.

**Figure 10 Income from fines and charges and selected charges, for 2002-03**

Authority	Income per 1,000 pop		Reservation charges	Overdue book charges	Loan concessions	Fine concessions
	Fines	Res				
Allshire	244	31	£1 adult 55p child	15p adult 2p child	Spoken word (SW): Free to OAPs, UB40, children, f/t students, disabled, VIPs, learning difficulties	None
Boothshire	337	49	90p adult 50p child	12p adult 6p child	SW & cassettes: Free to HB, reg. blind and disabled	Books: OAPs 6p per day. HB free
Cromshire	402	59	75p adult 30p child	Adult: 10p, up to £4.80 Child: 3p, up to £1.44	SW, CD, cass, videos: Free to HB, disabled & 60+	SW, CD, cass, videos: Free HB & disabled. SW: 60+ free
Drumshire	196	54	80p adult Child free	Adult: 10p + post., up to £4.23 12-17: 5p, up to £2.43	SW: Free HB & U12's CD: Free to HB SW, CD, DVD, videos: Reductions for benefits and 60+	Books & SW: U12's HB & VIP free. CD's: HB free
Eastshire	182 inc reservs		80p adult Child free	Varies	SW, CDs, videos: Free Under 16's and disabled	Books, SW, CD & DVD: Concessions for 60+, people with disabilities, U16's
Fulfodshire	189	35	80p adult Child free	Adult: 10p, up to £3.60 Child free	Books: Free to home readers and community services mobile free. Some concessions for benefits. SW, cassettes & CDs: Half price to above, free to VIPs	Books, SW, cassettes & CDs: Home reader service members, mobile users, adult literacy students.
Glenshire	289 inc reservs		70p adult Child free	1 <sup>st</sup> week 10p, 50p per week thereafter. Child: 5p per week, up to 50p	Books, SW, cassettes & CDs VIPs, hearing impaired, housebound, learning difficulties, disabled	Books: VIPs, hearing impaired, HB, learning difficulties, disabled

The above table illustrates that, of the group, Cromshire and Boothshire have particularly high income from fines and charges, and Eastshire has particularly low income. Boothshire has amongst the highest overdue charges and relatively few concessions, but the corresponding figures for Cromshire are about average for the group and their loan charges are relatively low (40p for spoken word for 3 weeks, 80p for CDs), compared to some other counties, (e.g. Boothshire, SW: 70p-£1.10 per week, CDs: 90p-£1.35).

During interviews, comments were invited from respondents regarding income generation from fines and charges. Allshire perceived that their income generation might be high compared to other authorities, given that they have fewer concessions and high reservation costs. The above table, however, indicates that Allshire does not stand out from the rest of the group. Conversely, Eastshire assessed themselves as being relatively low chargers, as reflected by the income generated. However, looking at Figure 10, Eastshire’s fines and charges are moderate compared to the rest of the group. Fulfodshire identified themselves as having relatively low income generation, which they attributed to changes in the scale of charges to promote social inclusion. There are reduced borrowing charges for concessions and no fines for children.

In Drumshire, charges are regularly reviewed by comparison with other authorities, and in Glenshire charges are reviewed on an annual basis.

**Other income**

Although it was not discussed during interviews, looking at Figure 9, there is considerable variation in the level of ‘miscellaneous receipts from the public’ across the group, which perhaps warrants further investigation. Eastshire included income from the hire of AV in this figure, but it is not known what has been included by other authorities.

**Expenditure**

**Figure 11 Breakdown of revenue expenditure per 1,000 population, for 2002-03**

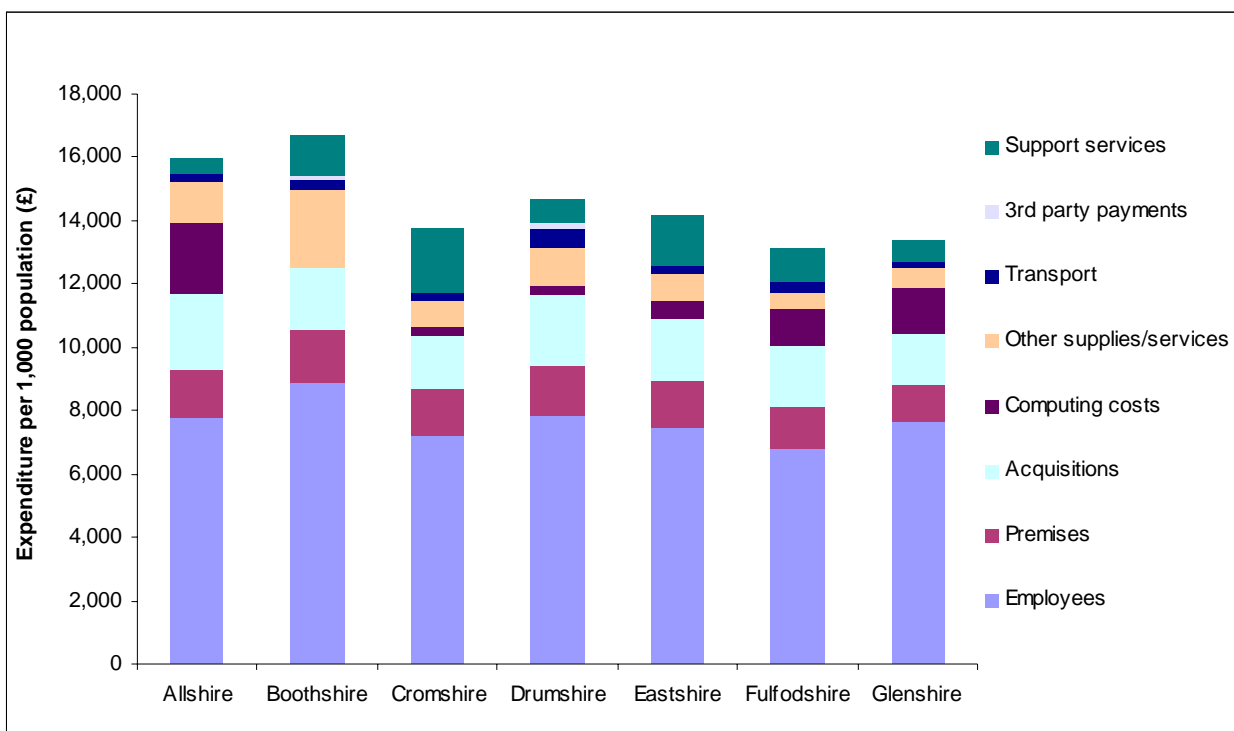


Figure 11 illustrates that, per 1,000 population, authorities Boothshire and Allshire appear to be the highest spending of the group, with both the highest spending on employees, and on other supplies and services. The spending of Boothshire on the latter is particularly high, and this figure contains elements accounted for elsewhere by other authorities (see below). Allshire has very high computing costs (non-financial), but in 2002-03, spending on the People's Network contributed heavily to this.

Fulfodshire's spending appears to be the lowest overall, and in terms of employee expenditure. The latter may be affected by the relatively low proportion of professional staff, as discussed earlier. In the absence of detailed staffing information, it is not possible to shed light on staff expenditure for any of the authorities at this point of the exercise.

### **Support services expenditure**

All authorities record a considerable amount of expenditure for support services. In the majority of cases, this includes an apportionment for corporate support, for example legal services, treasury and chief executive. Whether departmental central support is included here, or largely under staff costs, varies between authorities.

In Allshire, concern was raised at the apportionment of some of these central costs, which can be considerable. However, the figure for support services is low compared to the rest of the group. This can probably be accounted for by the inclusion of administrative support and some financial staff directly within library costs. For reference, this is no longer the case, and there is now a departmental charge, which would be included under support services expenditure.

In Boothshire, some corporate support has not been included in the CIPFA figures for 2002-03, so the figure largely reflects departmental central costs.

In Cromshire, human resources, health and safety and financial advice are covered in central support costs, whereas items such as vehicle maintenance are direct costs to the library service and are shown under the relevant area of the CIPFA return.

In Drumshire, the county council apportions the cost of central support to the library service, on the basis of time or work processed.

In Glenshire, support services expenditure includes executive costs, but excludes staffing costs for HR, administration and IT.

### **Other supplies and services**

This is somewhat of a 'catch-all' category. However, only one authority reported including anything beyond the CIPFA guidelines. The figure for Boothshire is particularly high, and it is thought that this reflects expenditure for the provision of the People's Network. It should be noted that this authority's computing expenditure is recorded as nil, in contrast to the rest of the group. In addition, it has been suggested that other supplies and services expenditure is so high in Boothshire because the service has to meet the full cost of other supplies and services, whereas in other authorities, these costs may be handled differently. This would warrant further investigation.

### **Impact of capital programme on service costs**

In Allshire, Cromshire and Glenshire, it is felt that the capital programme does not really impact on service costs, as the services are able to bid for money from the county council for capital projects (and associated ongoing revenue costs in Cromshire).

Both Boothshire and Fulfodshire said that capital financing charges are topsliced from their budgets and hence not included in revenue expenditure in the CIPFA return (which adheres to the CIPFA definition).

### **Overview**

This exercise has underlined the lack of consistency in figures reported to CIPFA. There are various reasons for this, including differences in interpretation, inability to isolate figures for the library service, and insufficient notes from respondents to qualify responses. Furthermore, CIPFA guidelines allow a degree of flexibility in the reporting of figures, such that, for example, a library authority may sample visits in busy weeks to ensure a 'good' visit count. This report highlights the need for standardisation in the compilation of data for submission to CIPFA, so that valid comparisons may be drawn between authorities and across years.

Of the group, three authorities report sample manual counts to CIPFA, three report people counter data and one reports a combination. It may not be a coincidence that the two authorities with the lowest visit figures both report manual sample counts, as it is widely acknowledged that automatic counters tend to over-count. However, this is not the finding of one authority in this group where manual checks of people counters have been undertaken. One authority suggested that it could be of interest for CIPFA to include visits per hour open, to indicate how efficient a library service is as a whole, irrespective of population distribution and the number of libraries.

All of the participating authorities have some rented and shared premises. There does not appear to be a clear link between premises costs and the proportions of rented and shared buildings, and it is generally felt that there are both advantages and disadvantages to renting and sharing premises. The way in which premises costs are apportioned appear to vary, although this warrants further investigation.

Preliminary analysis of bookstock and acquisition data revealed some interesting findings. Whilst there is a relationship between book acquisitions and expenditure, as we would expect, there is no clear link between bookstock and acquisitions and bookstock and acquisitions expenditure. Methods of counting stock vary, with some authorities reporting manual counts and some using library management system data (with no manual checking in two cases). The overall materials budget tends to be based on funds for previous years. Stock selection is largely centralised, and very little is outsourced to suppliers. There is very limited freedom to purchase stock locally.

Expenditure on transport varies considerably within the group, from £213 to £613 per 1,000 population in 2002-03. There are several models of transport provision, ranging from the library service being entirely responsible for its own transport, to transport being provided by the county council. Half of the group make deliveries on behalf of other agencies, but the associated costs are borne by the library service and are included in the CIPFA figures. Population distribution is an important consideration in terms of its implications for the provision of transport (and indeed library services as a whole), but such information is not readily available.

Regarding staff provision, the number of staff varies from 0.30 to 0.48 staff per 1,000 population, and staff expenditure also varies considerably. There is also considerable variation in the relative proportions of part time and full time staff, and, to some extent, the proportion of professional staff. Some of the findings related to staffing were not as we would expect. In one authority, for example, expenditure on staff appears to be high relative to the number of staff per 1,000 population, and in another authority, the reverse seems to be the case. However, there are differences in the classification of core library staff and central support staff between authorities, which may help to explain some of the variation in figures across the group. Investigation of staff structures, classification and pay scales during the seminar in the final stage of the project helps to shed light on this finding (p30-41).

All of the authorities involved in this exercise offer a range of services in addition to what could be considered their core service. In the case of joint arrangements whereby authorities are providing services on behalf of other agencies, the costs borne by the library service are often included in the CIPFA figures, giving rise to 'inflated' expenditure and staffing figures, relative to some other authorities. The handling of income from the provision of such services varies between authorities, and this undoubtedly contributes to the differences in overall income, since some authorities are not including such income anywhere on the CIPFA return.

The way in which ICT provision is managed varies between authorities, as does the way the associated costs have been reported to CIPFA. In some cases, central IT support has been included in computing costs, but in others it appears in the CIPFA return under support services expenditure. All the participating authorities offer a range of online services, and the majority are monitoring the usage of these services.

Looking more generally at income and expenditure, the main disparities between authorities found were in 'miscellaneous' and 'catch-all' categories in the CIPFA return. In terms of income, miscellaneous corporate income and receipts from the public vary considerably, and also grant income, which was reported to have been included under several different headings. In terms of expenditure, there is a large degree of variation in other supplies and services expenditure, which is perhaps not surprising given that it is a broadly defined category, and in support services spending.

## Benchmarking seminar

The final stage of the project was based around a seminar held in May 2005, to explore staffing, ICT and visitor management in more detail. Prior to the meeting, templates to collect information about staffing and ICT provision and expenditure were given to authorities to complete (*Appendices B and C*). Information relating to visit counting had already been supplied during the interview stage, and it was hoped that the seminar would highlight other factors influencing the number of visits. The seminar was facilitated by Leicestershire Library Services and attended by representatives from Warwickshire, Staffordshire and Cambridgeshire.

### Staffing

Authorities were asked to divide staff into direct services to the public, indirect support to frontline services and indirect support to the library service as a whole, and to supply FTE numbers, average and total salary costs. Authorities were also asked to supply details of salary grades and post holders with library qualifications. This information confirmed that there are a number of differences in the distinction between core staff and staff included under support services or other supplies and services in the CIPFA return, and that it is very difficult to compare posts between authorities. Whilst Allshire has the highest average salary cost, Boothshire has the highest salary cost per 1,000 population, per service point, and per hour open. However, it is important to note that Boothshire also has the lowest population, fewest service points and hours open, and that many of Allshire's support staff are not included in these figures.

### Summary of interview findings

- Of the seminar group, Fulfodshire has the lowest staff expenditure, the lowest proportion of professional staff, but the second highest number of staff per 1,000 population. In contrast, Allshire has a low staff per 1,000 population figure, but relatively high staff expenditure and the highest proportion of professional staff.
- However, there are clear differences between authorities in the counting of core library staff and support staff, and the associated expenditure. For example, in 2002-03 in Boothshire and Fulfodshire, support staff such as HR and, in Boothshire, administration were included in support services expenditure, but in Allshire and Cromshire, some elements of support services e.g. administration, featured under staff costs in the CIPFA return.
- It also seems likely that the definition of 'professional staff' differs between authorities. The CIPFA definition leaves room for interpretation.

### Seminar discussion

The seminar proved a useful forum for discussing the organisational differences which lead to variations in the apportionment of staff-related costs. At the seminar, each authority briefly described their staff structure and any important issues relating to staffing, with the aim of evaluating the extent to which valid comparisons can be drawn from the CIPFA statistics. Various factors affecting staffing and costs emerged from this discussion, and these are summarised below, as a possible basis for further investigation.

### Description of services

In **Allshire**, library services is part of the Community Services Directorate. The authority has undergone job evaluation and restructuring in the last three years, which has seen librarians and library assistants move to higher grades. Library development officer posts were also identified.

Salaries are banded according to HAY, but it is important to recognise that the HAY bands are not comparable across authorities. Since restructuring, some senior posts are now held by non-professionals, but there is still a relatively high proportion of professional staff at present. It is felt that these factors contribute to the county's high staff costs relative to the rest of the group. The authority has 15 multi-staffed libraries (which handle an estimated three quarters of business) and 38 largely single-staffed libraries (except in the evenings from September to March).

In **Boothshire**, the library and information service is part of the Libraries, Heritage and Trading Standards Directorate, and has 32 static libraries and five mobiles. The library leads the corporate customer service centre (which gives rise to a high level of miscellaneous corporate income). The authority has high staff costs, but also high issue and visitor figures. Boothshire suspects that one of the reasons for their high staff expenditure is because of the apportionment of staff costs, i.e. which posts are regarded as core library staff and support staff for the purpose of the CIPFA return. Also, the authority has very few single-staffed branches (most smaller libraries are double-staffed). A number of their library staff are involved in other activities for the County Council, and such work is currently absorbed into staffing figures in the CIPFA return. The authority is particularly interested to investigate staff deployment.

In **Fulfordshire**, the library service sits within the Education Directorate. The authority has a large number of service points - 44 static libraries and 11 mobiles, very few of which are single-staffed. There are five main (portal) libraries, each with a portal librarian. On a daily basis, the majority of libraries are run by senior library supervisors, who do not necessarily hold a library qualification. Restructuring several years ago led to a much more level staffing structure than some other authorities. There are now fewer senior managers and Chartered librarians, and the authority has a number of staff in senior posts who are non-professionals. This perhaps helps to explain the relatively low staff expenditure figures for the county, as well as the low proportion of professional staff (*Fig 6, p15*). Major elements of support, such as ICT and financial support are provided centrally by the Directorate, and do not feature in staff costs in the CIPFA return.

**Cromshire** has 32 static libraries, comprising one central library (currently undergoing refurbishment), six district and 25 community libraries. The authority also has nine mobiles and eleven Library Access Points (LAPs), which were set up about a year ago following library closures. They are run by volunteers and largely use library stock. Issue and visit figures for the LAPs are included in the figures reported to CIPFA. Until March 2005, the library service was part of Education, Libraries and Heritage, but is now part of Environmental and Community Services (largely transport services), within the Community and Learning Division (including heritage, archives and archaeology). This will impact on the recharges reported in the CIPFA figures. The last restructuring, which took place four years ago, led to professional librarians being taken out of libraries (except in several reference libraries), to work in project teams across the county. Administrative staff were also centralised and rationalised, enabling resources to be reinvested in frontline staff.

## **Factors affecting staff costs**

### *Proportion of part-time staff*

The group perceived that high levels of part-time working contribute to high staff costs, because of the overheads associated with each staff member (particularly training and management). In Boothshire, for instance, almost half of staff employed in the Directorate are part-time. However,

there is the consideration that part-time staff tend to be on lower salaries, and in fact, analysis for the first stage of this report (*Fig 6, p15*) showed that Boothshire has the lowest proportion of part-time staff, but the highest staff expenditure per 1,000 population. Conversely, Cromshire has the highest proportion of part-time staff but the second lowest staff expenditure.

### *Salary scales*

Salary scales differ between authorities, and it is difficult to compare across various levels of staff. It is important to note that even when the same banding system is used, comparisons cannot be drawn between the bands used in different authorities. There is considerable variation in average salary cost, ranging from £19,979 in Allshire to £16,776 in Fulfodshire.

### *Apportionment of overheads*

This particularly pertains to the way in which organisational differences affect how support service costs are handled, as regards the CIPFA return. The templates (*Appendices B and C*) completed by authorities prior to the seminar confirmed that there are differences in the distinction between 'core' library and central/departamental/corporate staff. For example, Boothshire and Fulfodshire include drivers in their employee costs, but in Allshire delivery drivers are included in support services. Similarly, in Cromshire and Allshire, administrative support is a feature of support services expenditure, but in Boothshire and Fulfodshire, some administrative staff are included in employee costs. Differences relating to ICT support staff are discussed on page 35.

### *Range of services delivered*

There is an obvious link between the services delivered by an authority and the associated staff costs. We would expect all library services to be offering similar 'core' services, but authorities are now providing many other services in addition. There was a unanimous feeling within the seminar group that the approach and categories used by CIPFA are somewhat out of date, and do not take into account the changes library services have seen in recent years, such as increased partnership working and the introduction of service centres/one-stop-shops.

In particular, in many authorities, library staff are becoming increasingly involved in contributing to wider corporate objectives. The seminar confirmed that in the participating authorities, such work is currently being absorbed into library staff costs. Boothshire feel that this is particularly an issue for them, where a large proportion of staff time, especially senior staff time is spent on corporate issues, and the library services manages the customer contact centre. Similarly, since reorganisation in Cromshire, senior managers have become more responsible for the smaller services in the division.

There was a preliminary discussion of stock acquisition and the extent to which stock is purchased centrally and selection outsourced to suppliers. It was agreed that this would be a beneficial area for future discussion and exchange of good practice. In the light of the recent *Who's in Charge? Report*<sup>2</sup>, DCMS has commissioned an investigation into how libraries buy books, which should shed light on areas where efficiency gains could be made.

Monitoring of the take-up of electronic services is difficult, and the approach taken by authorities is inconsistent. This area is becoming increasingly important, not least because of the staff

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<sup>2</sup> Coates T 2004 *Who's in Charge Responsibility for the Public Library Service*. Laser Foundation Report - Demos, London.

resource implications of having more automated services. This was raised by the group as an area for future consideration by CIPFA.

#### *Professional staff*

The ratio of professional to non-professional staff can be indicative of overall staff expenditure, but the group felt that this can be a superficial distinction in today's libraries, especially with the increase in para-professionals. It is considered more important to draw a picture of how staff are deployed, as opposed to a staff classification. However, notwithstanding this limitation to the CIPFA statistics, a clearer definition of 'professional' staff was called for by the seminar group.

#### *Staffing policy and agreed staffing levels*

All four authorities have an element of single-staffing in their branches, but the level is negligible in Boothshire, Fulfodshire and Cromshire. Allshire estimates that around half of its sites are single-staffed (except in winter evenings). This has clear implications for staff FTEs and associated expenditure. Whilst all authorities have agreed staffing levels for their branches, this is only formalised in Boothshire. Authorities are keen to investigate how minimum staffing levels are defined, particularly as there is considerable variation in staff per 1,000 population (*Fig 6, p15*) and per service point figures.

#### *Use of volunteers*

All of the participating authorities use volunteers, but the level of volunteer support varies considerably within the group. Unfortunately, more information was not available at the seminar, but it is felt that issues surrounding volunteers could be usefully followed up by the Midlands Performance Management Group.

#### *Geographical factors*

The size and population distribution characteristics of each authority clearly impacts on service delivery and staff requirements. Although not discussed in any detail at the seminar, several authorities reported difficulty in recruiting and retaining staff. This is a particular consideration in Boothshire, where the cost of living tends to be relatively high, and salaries are expected to reflect this.

#### *Job evaluation*

Job evaluation impacts on staffing structures and pay scales. Some authorities, such as Fulfodshire, are yet to go through this process.

#### *Sunday opening*

Sunday working usually attracts enhanced rates of pay, and so is a consideration in authorities where there is Sunday opening, e.g. Boothshire.

#### *Inclusion of externally-funded posts in staff costs reported to CIPFA*

Such posts should not be included in staff costs in the CIPFA return, but it seems that they are being included in some cases.

### **Next steps**

A small working group comprising staff from Allshire and Boothshire has been set up to investigate staff costs in more detail. A preliminary look at the staffing questionnaire circulated in advance of the seminar, highlighted considerable variation in staffing structures and the nomenclature of posts. For example, the average salary of a 'librarian' in Allshire (£24,723)

appears to be considerably higher than in Boothshire (£18,665), but this may be because Boothshire does not include specialist librarians in this figure. Allshire also has 17.5 library development workers with a lower average salary (£21,371), who, it is thought, serve a similar role to non-specialist librarians in Boothshire.

This group will also explore the apportionment of support service costs in more detail, to see if a common approach can be agreed within the group.

It was agreed that The Midlands Performance Management Group will be approached with a view to investigating the deployment of volunteers.

## **ICT provision and expenditure**

An ICT questionnaire (*Appendix C*) was also circulated in advance of the seminar, which primarily asked where the various elements of ICT expenditure are included in the CIPFA return. Significant differences were found between authorities:

- In Allshire, the majority of expenditure is included under computing costs, except PC purchase, consumables, expenditure relating to networks/communications (in supplies and services) and staff ICT training and web page maintenance (in staff costs)
- In Fulfodshire, all ICT associated costs are included under supplies and services, except general ICT support staff and insurance (miscellaneous)
- In Cromshire, the majority of ICT expenditure is also included under supplies and services, except line rentals (which are not part of the library budget, but are included in the CIPFA return in support service costs)
- In Boothshire, the majority of ICT-related expenditure is included in the CIPFA return as support service costs, and their expenditure includes a set amount per PC to fund equipment replacement.

Although these differences will not affect total expenditure, they help to explain differences in the breakdown of expenditure (*Fig 11, p26*). For example, Allshire has the highest computing costs of the group, but is including the majority of ICT-related expenditure in this figure. The seminar also set out to explore differences in provision of ICT between authorities, with the aim of identifying good practice.

## **Summary of interview findings**

- Allshire's ICT (non-financial computing) expenditure appears to be significantly higher than that of Fulfodshire and Cromshire. It was thought that this may be largely accounted for by People's Network expenditure (although the seminar went on to find elements contributing to this figure that other authorities are not including). Boothshire's ICT expenditure was not included on the CIPFA return for the library service in 2002-03.
- There are differences between authorities in the provision of ICT and the associated expenditure, in terms of the treatment of direct costs to the library service and indirect costs. Some authorities, e.g. Allshire have included indirect costs under support services in the CIPFA return, whereas others, e.g. Cromshire, Fulfodshire, appear to have included them under other supplies and services in the CIPFA return.
- Of the seminar group, only Fulfodshire mentioned core library staff involvement in the provision of ICT – one senior member of library staff and a TALIS manager.

## Seminar discussion

Although it was not possible during the seminar to draw out differences in overall ICT expenditure, the exercise reinforced that ICT associated expenditure, both direct and indirect, is being included in several different headings in the CIPFA return. In some cases, this is because of organisational differences between authorities, but different accounting protocol and lack of guidance from CIPFA are also contributory factors.

In **Boothshire**, ICT is provided by a combination of local and central support. There are four specialist IT staff for the Directorate, who have expertise in the specialist systems. Routine support is provided by corporate IT staff, for which a charge per computer is paid, in addition to any charges for special projects. The library service has five ICT support officers, who provide support for the public and some frontline staff support. The costs associated with these posts are included in overall staff costs, as opposed to ICT expenditure. Departments no longer purchase their own computers. There is a four-year replacement policy for computers, and the library pays a replacement charge over this period, per computer. There is a heavy development agenda in the authority, and Boothshire is concerned about the sustainability implications of meeting a four-year replacement cycle.

In **Cromshire**, funding for ICT is held within the library budget. The corporate IT section provides support for public and staff computers and the library management system - for which the library service is charged. A team of four provides support directly for the library service, and provides a helpdesk for staff. Whilst there is a budget for software and hardware maintenance, there is no budget for IT replacement, which means that replacement occurs on an *ad hoc* basis, when capital funding can be secured. The costs associated with ICT support are largely shown under supplies and services in the CIPFA return.

In **Fulfodshire**, the situation has changed recently. There is now one IT unit for the county, which is arranged into various teams. In addition, there is a dedicated LMS manager in Library Services, and ICT is under the responsibility of a member of senior management team. In common with Boothshire, there are also five IT specialists within the library service (librarians who are responsible for providing a customer service in the areas of knowledge management and digital citizenship), who are included in the CIPFA figures as core library staff. Previously, there were joint IT units in each directorate, and since the move to a single corporate unit the library has noticed increased response times for callouts and queries. The ICT budget is held by the library (although this may be subject to change in the future) and the cost of corporate support is recharged to the library service, and shown under supplies and services in the CIPFA return. The authority now has a four year replacement cycle for PCs, although it used to be a three year cycle. They are now moving away from leasing equipment to making more purchases, which is considered to be more cost-effective.

In **Allshire**, there is a central corporate ICT team and helpdesk, for which the associated costs are included under ICT expenditure in the CIPFA return, along with all other direct ICT costs. There are also two members of Community Services staff who are responsible for the TALIS system and liaise with a member of library staff regarding developments. The costs associated with these Community Services staff are shown under support services in the CIPFA figures.

## **ICT-related issues**

### *Charges for IT use*

All authorities charge for printing, but only Cromshire and Fulfodshire make other charges. Cromshire charges per half-hour session, and for e-mails (and has the highest income from fines and charges of the group – *Fig 9, p24*) and Fulfodshire charges for use after the first half hour. It would be interesting to investigate the impact of charging, and how it affects usage.

### *Procurement*

Boothshire voiced concern at their lack of freedom to purchase PCs, and questioned what economies of scale would be gained if there was more flexibility. The current approach creates potential difficulty for partnership working, because in Boothshire all machines have to look the same and have the same specification. Notwithstanding this, Boothshire has approached Allshire and another county to discuss the possibility of joint purchasing of ICT equipment on a regional level.

### *Staff ICT skills*

Concerns were raised about maintaining staff ICT skills and competencies. It is felt that this issue could be usefully taken forward with the West Midlands Training Forum.

### *Prison libraries*

Fulfodshire emphasised that prison libraries should be included in an authority's library management system, and that this will have implications for ICT provision and costs. This could also affect other agency services.

### *Service indicators*

In respect of the public library standard of 6 computers per 1,000 population, it is thought that only Fulfodshire meets the standard. However, the group questioned how indicative the standard is, and raised the importance of where computers are located.

### *Revenue and capital expenditure*

It is felt that there could be variation in the distinction between revenue and capital ICT expenditure, and none of the participants were aware of any set guidelines for their authority. However, within the group it was agreed that large items, such as the LMS, major upgrades and large pieces of equipment would be considered to be capital expenditure. Fulfodshire and Boothshire mentioned internal loans for major projects, and Cromshire also outlined a good housekeeping loan they had received for the installation of self-issue terminals.

## **Visitor management**

### **Summary of interview findings**

- Looking at visitor figures for 2002-03 for the whole benchmarking group, Boothshire, Cromshire and Fulfodshire have the highest visitor figures respectively, and Allshire the lowest. At the time, Allshire and Cromshire were recording sample manual counts and Boothshire and Fulfodshire were using people counters to record visits.
- In terms of the whole benchmarking group, visitor figures are generally lower for authorities reporting sample manual counts.

- All but one of the authorities have some automatic visitor counting in place, but of those authorities using people counters and manual counts, only one authority reported a combination of automatic and manual data to CIPFA.
- Although it is widely accepted that people counters tend to over-count visits, manual checking in Allshire found that the people counter at their busiest library was undercounting by some 17%. It would be interesting to explore the experience of other authorities in this respect. Similarly, in authorities reporting sample counts to CIPFA, it would be useful to know whether (and how) closures and other variations are taken into account in the grossing up of figures.
- Of the seminar group, all authorities except Cromshire said that automatic counters are regularly checked/calibrated, but the frequency of checking varies. However, none of the authorities mentioned any routine adjustments being made in light of manual checks.
- The question of what constitutes a visit remains a contentious issue, and is likely to become more so with the development of multi-service centres. At present, the inclusion of visitors to other services located in the same building as a library does not appear to be a major issue for the group. Similarly, no authority mentioned the lack of counting of visitors to library events outside opening hours as being an important consideration.

### **Seminar discussion**

Allshire started the discussion with the observation that the other three counties report significantly higher numbers of visits per 1,000 population, and it follows that they are interested to explore what is happening at service level to attract people into the libraries in the other authorities. The group agreed with the findings of the interview stage of the project - that authorities with automatic people counters tend to report higher visit figures - although interestingly, this has not been found to be the case in Allshire.

A negative relationship between issues and visits was noted – visits are increasing, while issues, in general, continue to fall. It was felt that that enquiries are generally increasing.

Three key issues for discussion were identified by the group:

- The definition of a visit
- Service-related issues around increasing visit numbers
- Counting methodology

### **Definition of a visit**

There is some contention about what should be considered as a ‘visit’, although CIPFA guidance states that ‘all visits for whatever purpose are included’ in relation to physical visits, except those to other agencies, unless they are to library sponsored activities. Visits to other agencies is becoming increasingly an issue with the expansion of multi-service centres, and guidance is called for in situations where it is not possible to identify the service being used by a visitor.

Remote access means that users no longer need to visit a library building to access some services (e.g. renewals). Virtual visits are considered to be important, particularly as physical visits are decreasing, but there is currently no satisfactory or consistent way of measuring virtual use. Hence, the emphasis at present for the CIPFA statistics and the Public Library Standards remains on physical visits, which, in turn, makes accurate measurement essential.

## Service related issues

### *Refurbishment*

From research comparing visit numbers before and after refurbishments, Boothshire reported that investment and refurbishment in the library service attracts new clientele. Similarly, when Fulfodshire implemented a major programme of refurbishment, they monitored trends in visit numbers. In the first year after refurbishment there was a significant increase in visitors, which then stabilised at the new level. Allshire are also beginning to collect similar data.

However, Fulfodshire also reported less positive experiences of refurbishment. Following refurbishment, they have found more teenagers coming into the libraries, who, if disruptive, disturb other users. The authority recognises that bringing in new clientele means that staff need to be given the skills to deal with them, so staff in the county were provided with extra training, and policies were set up to give them confidence in handling difficult situations. Cromshire reported a similar approach, with training sessions set up by the council training unit, specifically for library staff.

### *Marketing and promotion*

Fulfodshire was observed to have strong branding for its libraries, and a high level of corporate commitment. They have taken a retail approach (using the John Stanley Library Marketing Toolkit<sup>3</sup>) to discover what makes people want to use the library. Their Best Value review indicated a need for improvement, and they have benefited from having valuable evidence to inform what was needed. Allshire and Boothshire are also beginning to move in this direction, but the latter does not currently have funding to take it forward.

Boothshire observed that the key to increasing visits is investigating what mix of services suits clientele in particular areas. However, a balance has to be struck to maintain the breadth of service. Community profiling is seen as key to achieving an attractive, targeted service. Fulfodshire reported that as well as overall targets for the service, they also have local targets, so there is an element of local, rather than imposed, control.

It was observed that users expect to get everything at their local library, even from the smallest branch. Therefore, libraries must manage customer expectations, by, for example, publicising that if an item is not in stock, the library will obtain it. In Boothshire, for example, if an item is on the shelf anywhere in the county, it will be obtained within two days, free of charge. In Fulfodshire, customer care and staff training are considered to be very important, as are consistency of product and quality standards. In common with the retail sector, users expect the same service everywhere e.g. what happens when you join; stock display; complaint handling.

It is felt that there are issues surrounding public awareness of library services, in particular that the public do not know what libraries now do. Raising awareness is seen as important, and it was noted that refurbishment helps to promote libraries, because it generates publicity. Similarly, activities are helping to increase visit numbers. Boothshire reported success in targeting activities in particular areas, such as hosting events for other departments, e.g. local history road shows.

Cromshire reported that public meetings linked to library closures some years ago revealed shock over the state of local libraries, so they now produce library profiles with information on use, demographics and planning issues. These are used to set up meetings with local groups, users and

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<sup>3</sup> **John Stanley Associates** Library Marketing Toolkit  
[http://www.johnstanley.cc/innovative\\_libraries\\_club/innovative\\_libraries\\_club.phtml](http://www.johnstanley.cc/innovative_libraries_club/innovative_libraries_club.phtml)

parish councils, to gather feedback on the service. Catchment areas are defined by wards, to dovetail with census data. It is not known whether these meetings help to increase visits to libraries, but they do serve to engage the local community. It is interesting to note that Fulfodshire use a different approach in defining catchment areas.

Allshire questioned what is a realistic figure for visits, as they perceive that some counties, particularly very rural counties, are destined to have lower visit figures than other authorities. It was reported that a county library service outside the group suspects that their visit figures might be affected by clients using family tickets on rural mobiles, whereby one person borrows for the whole family. Fulfodshire has recently withdrawn family tickets.

#### *Opening hours*

Two PLSS which are often not met are those for opening hours and visits. The group questioned to what extent the two are connected, and called for further investigation in this area. This ties in with marketing of the library services, and finding out what users expect of their library service, possibly through community profiling. Similarly, there is a need to continuously review mobile routes and stops.

#### **Counting methodology**

Several different approaches to counting visitors are taken by the group, and different means are used to arrive at the figures reported to CIPFA (*see page 4 for details*). The possibility of agreeing a counting methodology within the group, for comparative benchmarking purposes, was raised. This might be in addition to figures reported to CIPFA. It is felt that the best way to take this forward would be through the Society of County Librarians, and that the chosen methodology would need to tie in with CIPFA and PLSS definitions.

Fulfodshire voiced concern at the mismatch between the definitions for the new Public Library Service Standards and current CIPFA data collection. It is felt that libraries can be penalised by the methodology for counting visitors in multi-service areas, and that there is also the potential for discrepancy in how auditors treat the definitions. The group concluded that there is a need for guidance on how best to meet the definitions and ensure that counts are accurate.

## Overview and next steps

There are many factors affecting staffing levels and related expenditure. Whilst it was found that the authorities in the group are providing broadly the same service, there are differences in staffing structures and deployment. One key area is central/support staff, and where they feature in the CIPFA return, particularly in terms of expenditure. Whilst organisational differences are inherent between organisations, it would be useful to identify various models of organisational structure, for meaningful comparison between authorities. Further investigation is now being conducted within the group, to establish a common staffing template and examine to what extent meaningful comparisons can be drawn. In order to do this, further investigation is called for in the following areas:

- Staff deployment – what staff are actually doing, and the proportion of time spent on corporate activities. Also, what is the minimum staffing level required to run a library effectively?
- The extent to which support services are centralised – as this affects the balance of employee expenditure and support services and other supplies and services expenditure (as well as perhaps overall expenditure if there are economies of scale). The group were keen to explore further the experience of Cromshire in centralising their administrative support, in terms of efficiency gains. However, there is some concern amongst authorities about the charges levied for central support, and the lack of transparency of these charges.

There are broad similarities in the provision of ICT within the group, but the way in which the related costs are dealt with varies. A consistent approach to the breakdown of ICT related statistics is seen to be essential, and the group is now investigating how this can be achieved. Of particular interest are:

- Sustainability – how authorities will cope with the commitment to replace large numbers of computers on regular basis, and ensure that staff have adequate ICT competencies
- Uptake of electronic services – how this can be effectively and consistently measured, and how library services can assess the amount of staff time saved through the use of these services.

Visitor figures, being subject to much public scrutiny, are an area of concern for all authorities. Within the group there is variation in how visitors are defined and counted, and which figures are reported to CIPFA; largely dependent on whether automatic counting equipment is in place. There is concern that there are no standard guidelines for checking/calibrating automatic counters, especially as the number of authorities relying on automatic counts increases. A standard definition and procedure was called for by the group, to achieve consistency, both between authorities and over time. In terms of increasing visitor numbers, Cromshire reported that they have found branch community profiles useful in engaging the public, and they have been asked to share the details with the rest of the group.

A number of general points also came out of the discussion. It is imperative to look at the service as a whole, and not just financial parameters. There are many areas where costs could be reduced, but not without impacting on the quality of the service being delivered. It is therefore important to look at how money is spent, rather than simply the amount spent under certain headings. In addition to issues discussed in relation to the seminar topics, the exercise highlighted that there are other areas of the CIPFA return which are perhaps in need of updating. For example, the group questioned how useful the number of active borrowers is as a measure, now

that many people come into the library to use electronic resources, or access the library remotely, without necessarily borrowing books.

Although, in some ways, this exercise has generated more questions than it has answered, it has proved a worthwhile exchange of ideas and has pinpointed some significant financial and service-related issues. It is now for the participating authorities to investigate areas of particular interest in more depth, notably staffing costs, and to perhaps, as a group, agree a consistent approach to the recording of statistics, such as visits.

## Appendix A: Selection of benchmarking group

This was the preliminary stage of the project carried out with reference to Leicestershire as the main client authority at that time. It involved three basic steps:

### 1. Identify English counties with geographical similarity to Leicestershire

The intention here was to identify only those counties with similar population distribution characteristics to Leicestershire. In 1997, Leicestershire became a unitary authority, leaving the county with several dispersed centres of population, south of Leicester and in the traditional market towns. The County Library Service has a large number of branches serving rural communities across the county and larger towns around the borders.

It is difficult to compare counties on the basis of population distribution, as data on the size and relative locations of settlements are not readily available. The approach taken here uses the ratio between the population density of the two most densely populated districts of a county, to indicate whether there is a dominant centre of population.

Data from the 2001 UK census were downloaded from the Office for National Statistics web site<sup>4</sup> covering total population, authority area and population density for all 34 English counties, at local authority district level. The ratio between the population densities of the districts with the two highest levels in each county were examined, and counties excluded from consideration where the most densely populated district was more than nine times as high as the next district. Counties excluded were Cambridgeshire, Cumbria, Devon, Lincolnshire, Oxfordshire and Suffolk.

### 2. Ascertain which counties are statistically similar to Leicestershire

Data from the most recent CIPFA Actuals available to LISU at the time (2001-02) were extracted for the remaining 28 counties, covering the proportions of the population aged under 15 and over 60, the average population per service point, total library expenditure per capita and total book stock per capita. Together with the census data for total population, county area and population density, these were used for a 'nearest neighbours' analysis.

Each measure was standardised across the 28 counties included, and the average distances from Leicestershire calculated. These distances were then ranked and plotted (see below).

### 3. Recommend a set for benchmarking

Based on the results of this analysis, three possible sets of benchmarking partners can be suggested, including a wider circle of authorities in each case.

Set 1: Nottinghamshire, Derbyshire, Durham

Set 2: Set 1 plus Cheshire, Gloucestershire, Warwickshire, Staffordshire

Set 3: Set 2 plus Shropshire, Buckinghamshire

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<sup>4</sup> <http://neighbourhood.statistics.gov.uk/>

Warwickshire expressed an early interest in this exercise and were willing to take part. The final choice of benchmarking partners was made by Leicestershire with additional input from Warwickshire. To assist in this decision, data tables were provided (see below) detailing the figures used in the selection processes above, and some key output measures for the ten library services. The authorities approached were those in set 2 above, with Cambridgeshire added at the request of Warwickshire. Durham and Cheshire declined to participate and the eventual set of authorities was:

Cambridgeshire	Nottinghamshire
Derbyshire	Staffordshire
Gloucestershire	Warwickshire
Leicestershire	

### Population density by district – potential benchmarking partners

		Pop'n density			Pop'n density
Leicestershire	Oadby & Wigston	23.7	Cheshire	Ellesmere Port & Neston	9.2
	Blaby	6.9		Congleton	4.3
	Charnwood	5.5		Vale Royal	3.2
	Hinckley & Bosworth	3.4		Macclesfield	2.9
	North West Leicestershire	3.1		Chester	2.6
	Harborough	1.3		Crewe & Nantwich	2.6
	Melton	1.0			
Nottinghamshire	Broxtowe	13.4	Gloucestershire	Gloucester	27.1
	Mansfield	12.8	Cheltenham	23.6	
	Ashfield	10.2	Stroud	2.3	
	Gedling	9.3	Tewkesbury	1.8	
	Rushcliffe	2.6	Forest of Dean	1.5	
	Bassetlaw	1.7	Cotswold	0.7	
	Newark & Sherwood	1.6			
Derbyshire	Chesterfield	15.0	Warwickshire	Nuneaton & Bedworth	15.1
	Erewash	10.0	Warwick	4.5	
	Bolsover	4.5	Rugby	2.5	
	Amber Valley	4.4	North Warwickshire	2.2	
	North East Derbyshire	3.5	Stratford-on-Avon	1.1	
	South Derbyshire	2.4			
	High Peak	1.7	Staffordshire	Tamworth	24.2
Derbyshire Dales	0.9	Cannock Chase	11.7		
Durham	Chester-le-Street	7.9	Newcastle-under-Lyme	5.8	
	Easington	6.5	Lichfield	2.8	
	Durham	4.7	East Staffordshire	2.7	
	Sedgefield	4.0	South Staffordshire	2.6	
	Derwentside	3.1	Stafford	2.0	
	Wear Valley	1.2	Staffordshire Moorlands	1.6	
	Teesdale	0.3			
			Shropshire	Shrewsbury & Atcham	1.6
				Oswestry	1.5
				North Shropshire	0.8
				Bridgnorth	0.8
				South Shropshire	0.4

Buckinghamshire	Wycombe	5.0
	Chiltern	4.5
	South Bucks	4.4
	Aylesbury Vale	1.8

### Population data for nearest neighbours analysis – potential benchmarking partners

	Population	Area	Pop'n density	% Over 60	% Under 15	Pop'n per service point	Spend per capita	Stock per capita
Leicestershire	609,600	207,732	2.9	20.7	18.3	9,993	13.9	1.5
Nottinghamshire	748,500	208,014	3.6	21.6	18.5	11,515	13.8	1.4
Derbyshire	734,600	254,270	2.9	21.9	18.4	12,666	14.1	1.4
Durham	493,500	222,417	2.2	21.9	17.8	10,071	14.0	1.6
Cheshire	673,800	207,334	3.2	22.1	18.4	14,973	14.1	1.7
Gloucestershire	564,600	269,698	2.1	22.4	18.5	12,547	12.1	1.7
Warwickshire	505,900	197,169	2.6	21.4	18.2	13,313	13.7	1.8
Staffordshire	806,700	261,590	3.1	21.0	18.4	14,939	11.8	1.4
Shropshire	283,200	318,761	0.9	23.8	17.8	9,766	13.3	1.6
Buckinghamshire	479,000	156,032	3.1	19.5	19.6	11,975	16.2	1.7

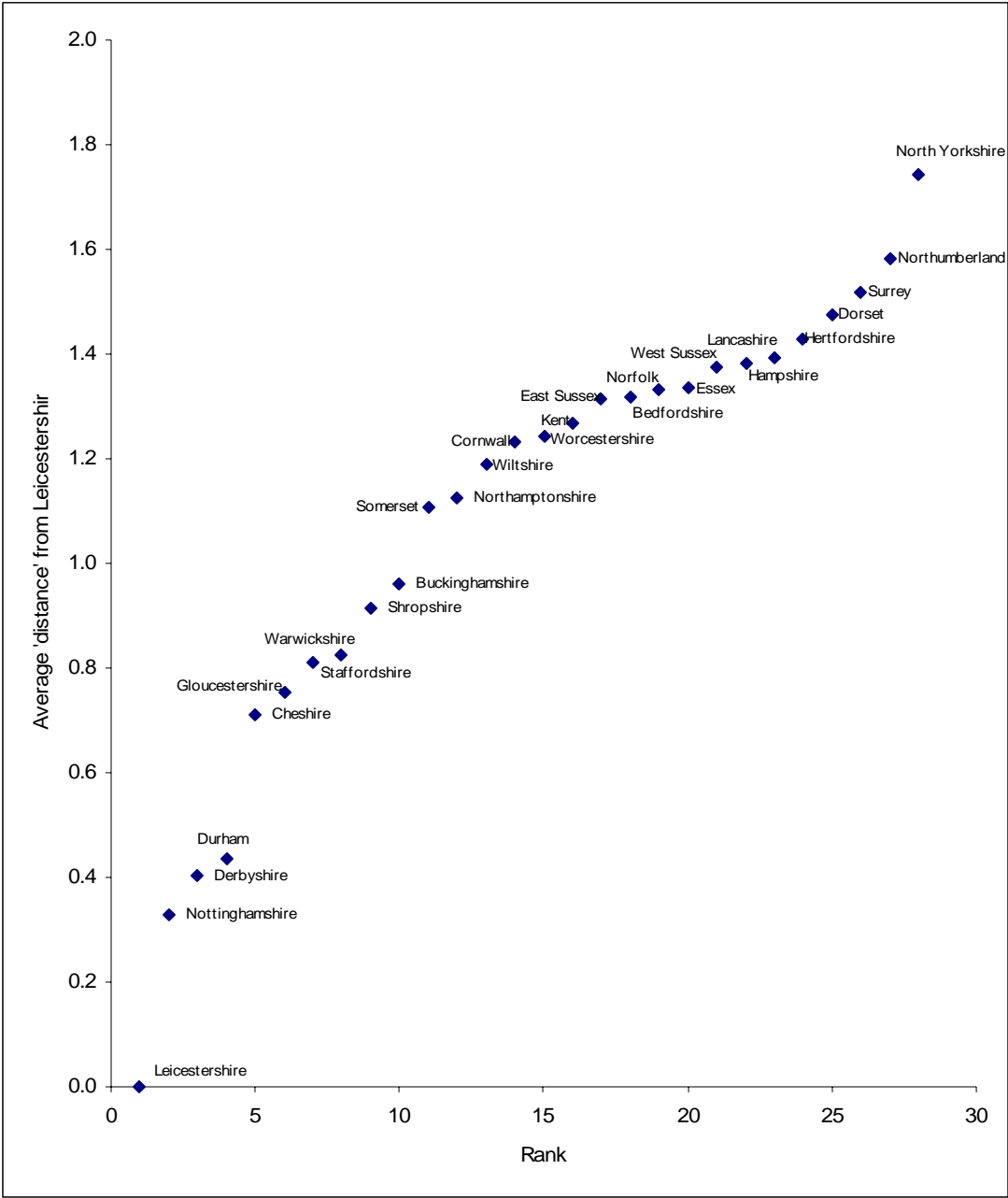
Source: LISU database / CIPFA Public Library Statistics Actuals 2001-02

### Selected library outputs for potential benchmarking partners

	Book issues per capita	AV issues per capita	Requests per capita	Enquiries per capita	Visits per capita	Cost per visit (£)	Pop'n per prof'l staff	Staff expenditure per capita (£)	% spend on materials	Overheads spend per capita (£)
Leicestershire	6.2	0.50	0.06	0.48	4.7	2.96	10,695	7.25	15.3	4.55
Nottinghamshire	6.6	0.60	0.22	0.55	4.9	2.83	9,298	6.86	14.4	4.95
Derbyshire	6.2	0.74	0.09	0.72	4.5	3.16	10,585	7.62	13.4	4.60
Durham	6.8	0.29	0.39	1.40	4.8	2.94	14,955	6.87	13.7	5.24
Cheshire	8.7	0.66	0.11	0.93	6.7	2.10	8,108	7.59	19.5	3.74
Gloucestershire	6.6	0.54	0.14	0.94	4.4	2.76	11,360	7.06	11.7	3.59
Warwickshire	7.4	0.61	0.11	0.97	6.1	2.24	8,446	8.16	13.7	3.70
Staffordshire	6.5	0.58	0.13	0.75	4.7	2.50	14,614	6.37	14.2	3.79
Shropshire	5.6	0.56	0.16	0.84	5.1	2.62	8,209	6.73	11.5	5.05
Buckinghamshire	8.4	1.89	0.20	0.71	7.6	2.14	11,827	8.33	23.9	4.00

Source: LISU database / CIPFA Public Library Statistics Actuals 2001-02

Nearest neighbours plot



## **CALCULATING THE ACTUAL COST OF PROVIDING LIBRARY SERVICES**

To try and ensure that all participating libraries are comparing like with like, the following approach is proposed for analysing staffing costs.

Firstly to identify those staff that are providing direct services to the public either through static service points or via mobile libraries.

This would include:-

- 1) All staff employed in libraries and on mobiles dealing direct with the public (including casual and relief staff to cover sickness, holidays etc.) Contract value only to be shown
- 2) All supervisors of staff in 1)
- 3) Management time specifically supporting staff in 1) and 2). Note these staff may not be physically based in a public library.

Secondly, to identify those staff whose primary role is to provide a co-ordinating or support role that does not require them to be based in libraries or mobiles but are part of the library service establishment.

Thirdly, to identify any staff employed in the traditional support areas of administration, finance, HR etc. who are employed as part of the library service establishment.

Staff and services being excluded from this exercise are services to schools/prisons/hospitals or other outside agencies and staff costs of project-based workers that are time-limited.

Each authority should provide a copy of their organisation chart as at 1/4/05 and complete the attached spreadsheet, in the categories indicated, columns A-I. This should be the total establishment of the structure not the numbers of staff in post at the 1<sup>st</sup> April.

### **Column Headings**

- |       |   |   |
|-------|---|---|
| A     | - | Management or front-line staff (including Line Managers of front line staff)  |
| B & C | - | Bottom and top of salary grade (excluding overheads of NI and super)  |
| D     | - | 'Professional librarian' as per CIPFA   |
| E     | - | Other than librarian as per CIPFA but excluding caretaking/cleaning staff   |
| F     | - | What used to be traditionally identified as manual, e.g. caretaking/cleaning staff  |
| G     | - | Post title  |
| H     | - | Number of posts/FTE equivalents. Note – include posts as fte's even if time is spent on other areas of work not being recorded as the assumption is they would not be employed unless they were needed for their core duties. |
| I     | - | An option to amend the costs if needed to reflect other non specific library work   |

Costs of enhancements/overtime/additional hours for cover etc if not contained in the contracted hours figures in the spreadsheet should be shown as an estimated cash figure in the appropriate category.

For opening hours, please supply a list of all public service points weekly hours as at 1/4/05.

Where support services for admin/finance/transport etc form part of a recharge from another department please identify the approximate estimated costs and whether these are above or below the line charges.

March 2005







Category Description	To be Included on CIPFA returns		Where Included on Library return.					
	RA	2005/06 Library	Supplies & Services	Support Services Costs	ICT	MISC	Comments	
<b>EXPENDITURE</b>								
<b>STAFF PC'S</b>								
Purchases								
Replacement - Funds / Contributions								
Licence Fees eg Windows, Microsoft Office, email, Internet etc.								
Hardware maintenance charges								
Software maintenance charges								
<b>PUBLIC PC'S (Including People's Network)</b>								
Purchases								
Replacement - Funds / Contributions								
Licence fees eg. Windows, Microsoft Office, email, Internet etc.								
Hardware maintenance charges								
Software maintenance charges								
Any Specialist equipment for clients with specific needs, eg Larger screens, Keyboards, Mouse								
Any Specialist Software for clients with specific needs.								
<b>LIBRARY MANAGEMENT SYSTEM (eg GEAC)</b>								
Specific Hardware eg. Servers								
Counter based equipment PC's or Terminals								
Hand held scanners etc.								
Central / Corporate Support								
Departmental / Support								
Supplier Support								
Upgrades								





## **LISU** Mission Statement

LISU is a national research and consultancy centre which promotes good management practice in information, cultural and academic services, through providing independent advice and support for advocacy and for performance evaluation and enhancement.

## **LISU** Strategic Purposes

1. To provide library and information services managers and policy makers with the range of tools they need to develop services to their full potential, including authoritative data on the operation of services
2. To raise awareness of the value of performance evidence in managing and to increase understanding and the application of such evidence
3. To conduct advanced research that contributes both to the evolution of investigative methods and to the understanding of information, cultural and academic services and the wider knowledge economy
4. To maintain and enhance LISU's reputation for quality in data collection and analysis; reliability and authority in data dissemination; and independence and integrity in reporting results
5. To continue the development of LISU's field of operations, particularly in cultural services, including museums, galleries and archives, and academic support services

## **LISU** Values

1. LISU rigorously protects and promotes its reputation for integrity and unbiased reporting of the results of any investigation which it undertakes
2. LISU consistently develops its collective skills, knowledge and experience and applies enthusiastic commitment to achieving quality in its output
3. LISU actively contributes to sharing knowledge and extending professional discussion through participation in conferences, scholarly publishing and similar avenues of dissemination

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