

Appendix A: Explanation of Distribution of Funds to Member and Partner Libraries

The Umatilla County Special Library District (UCSLD) was created on November 4, 1986, by voters from all of Umatilla County except for incorporated Hermiston. The order creating the District reads, "The purpose of the Umatilla County Special Library District shall be to provide library and information services to persons within the district." Further, the UCSLD "shall be a municipal corporation and shall have perpetual succession, and shall, in its own name, exercise and carry out the powers and objects provided for by Oregon Statutes governing library districts."

Through agreements between the District and the established public libraries in Umatilla County, the UCSLD ensures the provision of public library service to all residents within its boundaries. The public libraries within the District boundaries are defined as "member libraries." At the start of the District the City of Hermiston chose not to be part of the District, but instead later signed an agreement with the District to provide access to library services for the rural or unincorporated Hermiston population. Therefore, Hermiston Public Library is considered a "partner library."

The funding model which distributes tax revenue to District libraries provides that 80 percent of UCSLD tax revenues would go to the District member libraries and partner library. The remaining 20 percent of revenues remain with the District, and are used for operations and administration, and services provided to member libraries, including but not limited to cataloging services, courier delivery service, membership in the Integrated Library System (ILS) [now SAGE], and resources for all residents such as Library2Go (Libraries of Eastern Oregon pricing) and early childhood literacy outreach services.

In the Fall of 2019 the UCSLD Board of Directors conducted a review of the tax distribution process, culminating in a decision in 2021 to update the distribution formula consistent with ORS 357.405, which defines "public library," and the rules for implementation found in OAR 543-010-0036. Each library's service population is now determined by population within their zip code area in Umatilla County.

The formula consists of two funding components: (1) Base threshold criteria, and (2) population. The elements of the base threshold criteria are: Personnel, collections, and operations and maintenance (O&M). These elements are adjusted by population size category. The population component is determined by the census zip code area numbers.

Every three (3) years, the Board of Directors will review the threshold criteria and update as needed and will review and update the formula to reflect the current population numbers.

The distribution percentages are determined through the following process:

Population for each zip code in UCSLD boundaries is provided to the District by the Portland State University Population Research Center and the American Community Survey. The zip code population for each member library and partner library is as follows:

Zip Code	City	2020 Census Population - City	2023 Census Population - Zip Code Area	Population of UCSLD Zip Code Areas	Zip Code area number as a percentage of the whole zip code population	Remainder of difference between County Population and zip code populations with % change applied	Final Population Figures to Use
97810	Adams	389	906	906	1.47%	906	906
97813	Athena	1,209	1,421	1,421	2.31%	1,422	1,422
97826	Echo	632	1,082	1,082	1.76%	1,082	1,082
97835	Helix	194	383	383	0.62%	383	383
97838	Hermiston	19,354	29,026	8,704	14.15%	8,708	8,708
97862	Milton-Freewater	7,151	11,798	11,798	19.19%	11,803	11,803
97801	Pendleton	17,107	22,354	22,528	36.63%	22,538	22,538
97859	Meacham	170	174	0	0.00%	0	0
97868	Pilot Rock	1,328	1,796	1,796	2.92%	1,797	1,797
97875	Stanfield	2,144	2,925	2,925	4.76%	2,926	2,926
97880	Ukiah	159	225	225	0.37%	225	225
97882	Umatilla	7,363	8,459	8,459	13.76%	8,463	8,463
97886	Weston	706	1,267	1,267	2.06%	1,268	1,268
		57,906	52,790	61,494	100.00%	61,520	61,520
PSU Site	Umatilla County	80,075	81,842				
Hermiston Rural		9,672	8,704				
Unassigned		24	26				

The formula for determining the distribution to each library is below:

FY 24-25 Anticipated Distribution	2023 Population	Pop Size Category	Base Threshold Criteria Elements					BASE Amount	REMAINDER Amount	TOTAL DISTRIBUTION	Multiplier for Remainder Funds		
			Personnel FTE*	\$	Staff Funding	Collections	O&M				Total	Zip Code population	% of the total for each zip code area
	906	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$13,756	\$42,268	906	1.47%	1.86%
	1,422	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$21,590	\$66,439	1,422	2.31%	2.92%
	1,082	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$16,428	\$61,277	1,082	1.76%	2.69%
	383	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$5,815	\$34,327	383	0.62%	1.51%
	8,708	2	0.0	\$47,840	\$0	\$0	\$0	\$0	\$132,211	\$132,211	8,708	14.15%	5.81%
	11,803	2	2.9	\$47,840	\$139,073	\$11,803	\$15,088	\$165,964	\$179,202	\$345,166	11,803	19.19%	15.16%
	22,538	2	4.3	\$47,840	\$207,546	\$22,538	\$23,008	\$253,093	\$342,188	\$595,281	22,538	36.64%	26.14%
	1,797	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$27,283	\$72,133	1,797	2.92%	3.17%
	2,926	2	1.2	\$47,840	\$55,992	\$2,926	\$5,892	\$64,810	\$44,425	\$109,234	2,926	4.76%	4.80%
	225	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$3,416	\$31,928	225	0.37%	1.40%
	8,463	2	2.5	\$47,840	\$117,769	\$8,463	\$12,623	\$138,855	\$128,491	\$267,346	8,463	13.76%	11.74%
	1,267	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$19,236	\$64,086	1,267	2.06%	2.81%
\$1,821,694	61,520	1<2000; 2>2000	*Based on Pop Size Cat: 1=0.5 pop<1000, 0.8 pop>1000; 2=pop/2000x 0.8 <5000 and for >5000=2/15,000*(pop-5000)+2	1 fte @ 23.00/HR		1- pop<1000=\$2000; pop>1000=2500; 2= 2500 or pop*1 whichever is greater	10% of Staff+Coll	\$887,654	\$934,040	\$1,821,694	61,520	100.00%	80.00%
	Hermiston shows Unincorporated only		Calculated, not rounded		Calculated, not rounded			48.73%	Used remaining funds after the base amount is distributed. Used a % derived from each libraries' % of whole zip code				

For the next three years, FY 2025-26, FY 2026-27 and FY 2027-28, the distribution multipliers (a fraction of the 80% calculated) for the member libraries, the partner library and the District are as follows:

Adams	0.0185621
Athena	0.0291768
Echo	0.0269099
Helix	0.0150748
Hermiston (Rural)	0.0580607
Milton-Freewater	0.1515798
Pendleton	0.2614187
Pilot Rock	0.0316773
Stanfield	0.0479703
Ukiah	0.0140212
Umatilla	0.1174055
Weston	0.0281435
District	0.2000000
	100.00%

The Board will review and update the population numbers during the last year of the Agreements.