

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. The zip code population for each member library and partner library is as follows:

Zip Code	City	2020 Census Population - City	2020 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	887	887	1.46%	888	888
97813	Athena	1,209	1,386	1,386	2.29%	1,388	1,388
97826	Echo	632	1,061	1,061	1.75%	1,063	1,063
97835	Helix	194	373	373	0.62%	374	374
97838	Hermiston	19,354	28,348	8,994	14.83%	9,007	9,007
97862	Milton-Freewater	7,151	11,512	11,512	18.99%	11,529	11,529
97801	Pendleton	17,107	21,882	22,052	36.37%	22,084	22,084
97859	Meacham	170	170	0	0.00%	0	0
97868	Pilot Rock	1,328	1,756	1,756	2.90%	1,759	1,759
97875	Stanfield	2,144	2,875	2,875	4.74%	2,879	2,879
97880	Ukiah	159	224	224	0.37%	224	224
97882	Umatilla	7,363	8,271	8,271	13.64%	8,283	8,283
97886	Weston	706	1,241	1,241	2.05%	1,243	1,243
		57,906	79,986	60,632	100.00%	60,721	60,721
PSU	Umatilla County	80,075	80,075				
Hermiston Rural		8,994					
Unassigned		89					

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

	FY 22-23 80% Anticipated Distribution	2020 Population	Pop Size Category	Base/Threshold Criteria Elements					BASE Amount	REMAINDER Amount	TOTAL ESTIMATED DISTRIBUTION	Multiplier for Remainder Funds	
				Personnel FTE*	\$	Staff Funding	Collections	O&M				Total	Zip Code population
Adams		888	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$12,186	\$40,698	888	1.46%
Athena		1,388	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$19,041	\$63,890	1,388	2.29%
Echo		1,063	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$14,576	\$59,425	1,063	1.75%
Helix		374	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$5,124	\$33,636	374	0.62%
Hermiston (rural)		9,007	1	0.0	\$47,840	\$0	\$0	\$0	\$0	\$123,560	\$123,560	9,007	14.83%
Milton-Freewater		11,529	2	2.9	\$47,840	\$137,325	\$11,529	\$14,885	\$163,739	\$158,152	\$321,891	11,529	18.99%
Pendleton		22,084	2	4.3	\$47,840	\$204,653	\$22,084	\$22,674	\$249,411	\$302,951	\$552,362	22,084	36.37%
Pilot Rock		1,759	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$24,124	\$68,973	1,759	2.90%
Stanfield		2,879	2	1.2	\$47,840	\$55,097	\$2,879	\$5,798	\$63,774	\$39,497	\$103,270	2,879	4.74%
Ukiah		224	1	0.5	\$47,840	\$23,920	\$2,000	\$2,592	\$28,512	\$3,077	\$31,589	224	0.37%
Umatilla		8,283	2	2.4	\$47,840	\$116,622	\$8,283	\$12,490	\$137,395	\$113,627	\$251,022	8,283	13.64%
Weston		1,243	1	0.8	\$47,840	\$38,272	\$2,500	\$4,077	\$44,849	\$17,049	\$61,898	1,243	2.05%
	\$1,712,216	60,721	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	\$879,251	\$832,965	\$1,712,216	60,721	100.00%
		Hermiston shows Unincorporated only		Calculated, not rounded	Calculated, not rounded			51.35%	Used remaining funds after the base amount is distributed. Used a % derived from each libraries' % of whole zip code population.				

For the next three years, FY 2022-23, FY 2023-24 and FY 2024-25, the distribution multipliers (a fraction of the 80% calculated) for the member libraries, the partner library and the District

are as follows:

Adams	0.0190152
Athena	0.0298514
Echo	0.0277653
Helix	0.0157159
Hermiston (Rural)	0.0577310
Milton-Freewater	0.1503975
Pendleton	0.2580806
Pilot Rock	0.0322264
Stanfield	0.0482511
Ukiah	0.0147595
Umatilla	0.1172854
Weston	0.0289207
District	0.2000000
	100.00%

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