

Jos Holman, Co-Chair
Tippecanoe County Public Library

Sally Stegner, Co-Chair
Lawrenceburg Public Library

Karen Ainslie
Indiana State Library

Marcia Au
*Evansville Vanderburgh
Public Library*

Cate Birdseye
Garrett Public Library

Bill Bolte (recently retired)
*Jeffersonville Township
Public Library*

Roberta Brooker
Indiana State Library

Rose Bryan
Adams-Geneva Public Library

Emily C. Bunyan
Knox County Public Library

Stephen Boggs
New Carlisle Public Library

Jim Corridan
Indiana State Library

Peg Evans
Hammond Public Library

Jane Ellen Felchuk
*North Judson-Wayne Township
Public Library*

Wendy Knapp
Indiana State Library

Ginny Nilles
Muncie Public Library

Dianne Osborne
Hancock County Public Library

Laurel Setser
*Avon-Washington Township
Public Library*

Jake Speer
Indiana State Library

Linda Yoder
Nappanee Public Library

Executive Summary
Indiana Public Library Coalition
December, 2008

Background

On August 28, 2008, the Indiana Public Library Coalition – 18 representatives designated by three respected groups, ADOLPLI, SAMS, and ISL – launched a 90-day concentrated effort to coalesce the statewide library community around thoughtful, practical strategies to manage the impact of local government and property tax reforms on Indiana’s public libraries. Its goals:

1. **A shared vision of the future for Indiana libraries** that responds to the state’s economic and political realities and aligns public libraries, the State Library, and elected officials on issues affecting library governance and funding;
2. **A plan for the future which ensures full citizen access to library services** and an array of service delivery systems which ensure that every citizen is part of a library district ;
3. **A legislative strategy focused on local community options, not statewide mandates**, including flexible models which can be adapted to local community needs; innovations which improve library service quality and efficiency without expensive consolidations; and/or strategies to stimulate movement toward county-wide or multi-county districts as models for improving efficiency in local government.

The 90-Day Process

In September, the group closely examined Kernan-Shepard Commission recommendations that 239 library districts be consolidated into 92 countywide systems, a move which would eliminate untaxed and “unserved” areas in 38 of 92 counties; that libraries budgets and bonds be subject to local government oversight and approval; and that the Indiana State Library expand statewide purchasing and service arrangements in order to improve the effectiveness and efficiency of library services across the state. [*Streamlining Local Government*, Indiana Commission on Local Government Reform, Recommendations 18, 19, and 20]

The Coalition, with help from ALA, explored library models around the country and learned that, like Indiana, other states are struggling with the challenge of local government reform and the evolution of library system configurations – *for which there are no prescriptive models*.

The evidence suggested that Indiana libraries face huge economic, technological, and service delivery challenges over the next decade – *change requiring multiple efforts on multiple fronts*. At the same time, the Coalition developed two working assumptions regarding public libraries’ collective ability to navigate these developments:

- Indiana’s public library community has, over the past decade, demonstrated a significant capacity for managing change, experience preparing it to be a leader in local community responses to the challenges of change and reform; and
- Aligning public libraries around a shared vision of the future requires strengthened leadership from within the public library community, an improved understanding of leadership responsibilities and decision-making processes, and a clearer, more visible leadership role for IPLA and its trustee arm, ILTA.

During October, the Coalition conducted *an online survey* to bring focus to major issues. The survey commanded 407 responses from library directors and trustees representing at least 156 library systems.

Survey responses were used to prepare for a series of *18 focus groups* conducted in six regional locations across the state. Focus groups attracted 349 participants from at least 121 libraries.

Information gleaned from survey responses:

- Libraries across the state are struggling with the prospects of funding losses due to HB 1001 and the increased competition for local resources;
- Increasing statewide service demands include: 1) public internet access; 2) non-print circulation; 3) helping patrons interpret or navigate web-based information; 4) providing more children's services; and 5) adding electronic service delivery tools such as remote access and automated checkout.
- The characteristics expected to distinguish high performing libraries in the coming decade: 1) a much more visible community profile ; 2) new financial management skills; and 3) the full integration of new technologies.
- Examples of minimum statewide standards for which all libraries should be accountable: high quality children's programs; public access to high speed internet services; and a dynamic website presence.

Examples of recurrent themes from focus group discussions:

- The change facing public libraries across the state requires:
 - 1) aggressive responses to new developments in public library technology,
 - 2) practical responses to economic pressures to become more cost-efficient,
 - 3) acceptance of a new, more entrepreneurial management culture;
 - 4) stronger relationships with other local government entities and the business community; and
 - 5) more visible trustee leadership within each local community.
- A more mobile population with increased needs for information resources expects uniform statewide access to consistent library service quality.
- Tax support for libraries should be a statewide requirement *and not a local option*. Currently unserved, untaxed areas should be integrated in a local countywide taxing plan, *but not at the expense of current library levies*.
- The local library is a source of local pride – a treasured source of local history, genealogy, and community identity – and many communities resist new management structures which might threaten that identity.
- Simple per unit cost comparisons do not adequately reflect service quality or management efficiencies. *Libraries must be evaluated on both quantitative and qualitative performance measures.*
- High statewide performance standards, appropriately implemented, will stimulate the evolution of a more nimble, locally responsive, technologically savvy, and cost-effective “21st century” institution.

During its November work sessions, the Coalition synthesized its findings and began laying the foundation for a more efficient service delivery system. Its strategies for aligning the library community focused on the following:

1. A substantial strengthening of trustee leadership at both the local and state levels
2. A legislatively supported plan to remove barriers to full citizen access

3. New, more timely performance standards which ensure high service quality and statewide service consistency
4. Statewide integration of new technologies which strengthen both library services and local community economies
5. ISL technical assistance and transition support services to ensure the successful management of change

Building on that foundation, the Coalition further developed a continuum of *optional* library service models that all begin with a *required* County Level Service Planning Process. An alternative approach to top-down mandates for county level consolidation, the concept blended *local community determination* and *universal access* strategies to create a formal service planning process at the county level which would ensure

1. Full service coverage within that county;
2. Libraries which meet or exceed specific statewide service standards; and
3. A multi-year funding plan (a unified, coordinated taxing structure) which ensures both.

The service continuum includes five potential service models for achieving new economies of scale. All models maintain the current library district taxing model and local trustee appointments, all require cooperative efforts (whether consolidating existing systems, creating resource-sharing alliances, or establishing federations to manage multiple systems), and all require adherence to the same basic **Model Criteria:**

1. Funding plans which ensure financial sustainability
2. Services responding to unique local community needs
3. Emphasis on local decision making
4. Fully funded service coverage for every county
5. Countywide capacity to meet new statewide performance standards
6. Collaborative initiatives which leverage all resources
7. The collection of data to quantify new efficiencies
8. Annual planning and evaluation processes which ensure continued improvement strategies

Briefly described, the five models include:

1. Two or more systems within a county	2. One consolidated countywide system	3. A multi-system and/or multi-county <i>Alliance</i>	4. A multi-system or multi-county <i>Federation</i>	5. A Regional <i>Consolidated System</i>
County funding and service plan allows service delivery by two or more existing, independently governed systems <i>able to meet Model Criteria.</i>	County funding and service plan requires merger of multiple systems into one countywide system which <i>meets Model Criteria.</i>	The county requires collaborating and system sharing among two or more systems, e.g. full reciprocity, “best practice” orientation, to achieve new economies of scale. <i>Systems remain independent.</i>	The county plans a formally contracted relationship among multiple libraries to <i>create a shared management system</i> capable of meeting Model Criteria. <i>Retains current governance and funding structures.</i>	The County funding and service plan provides for full consolidation with one or more additional counties, <i>the resulting system able to meet Model Criteria.</i>

With acceptance of the local community planning concept, each model will be further developed to delineate its primary goals and key organizational characteristics; the benefits and challenges associated with its adoption; and environments in which it might work best. That work will be incorporated into the Coalition's final report, ready for distribution by early January.

The timetable for key events supporting a local county planning process:

Jan – June, 2009	<ul style="list-style-type: none">* Enabling Legislation: Universal Service & County Planning Processes* County Model Delineation* Statewide Performance Standards* ISL Planning Grants* Standard Data Formats & Planning Templates* Recruitment Of County Planning Bodies* Regional Training Sessions
July – Dec, 2009	<ul style="list-style-type: none">* County Work Sessions: Plans For 2011 & 2012
Jan-June, 2010	<ul style="list-style-type: none">* The melding of county plans with annual library budgeting processes* Implementation of state level processes for counties unable to develop service and funding plans
July-Dec, 2010	<ul style="list-style-type: none">* ISL Report: statewide impact of plans and budgets
Jan, 2011	<ul style="list-style-type: none">* Year 1 implementation of two-year plan
Oct-Dec, 2011	<ul style="list-style-type: none">* Evaluation and adjustment for Year 2