

**State Support of Public Libraries:  
Current Proposal and Invitation to Comment  
December 2007**

Dear Michigan Library Colleagues,

As you know, I recently formed an advisory committee to work with me. We have reviewed and evaluated all of the input, concerns, and ideas about how state aid to public libraries can be distributed and accountably utilized to provide improved library service to Michigan's residents. All of this feedback has informed a new draft model for the expenditure of state funds to improve public library service in a consistent and equitable manner statewide. This proposal is offered as a basis for real comment, compromise, and ultimately revised or new legislation, but it is not in final form at this point by any means.

Documentation gathered prior to the two advisory committee meetings can be found at: <http://www.uproc.lib.mi.us/slc/finance/serviceplan.html>

Documentation of the two meetings can be found at: [www.michigan.gov/lma](http://www.michigan.gov/lma)

The advisory committee was designed to include representation from public libraries of varied sizes, varied urban/rural settings, covering the state's vast geography, and with representatives from most of the current library cooperatives. Additionally, we included the legislative liaison and the deputy director of the Dept. of History, Arts and Libraries, the Library of Michigan's library law specialist and our director of statewide services, and the executive director of the Michigan Library Association. The State of Michigan's Office of Great Workplace Development provided facilitators to us.

The first portion of the initial meeting was spent making introductions and establishing expected outcomes. I reviewed the following points for the group:

- The conversation has been developing from summer of 2006 to the present
- No plan, draft or otherwise, had actually been put forward to date
- With input provided from the advisory committee, I hoped to come away with something concrete to work with, beyond continued unstructured sharing of ideas and concerns. The library community is ready for and asking for something more concrete upon which to comment and build
- What is not part of the purpose: There is no intent to define what non-state-funded activities can or cannot or should or should not be undertaken via regional or any other kind of collaboration among Michigan libraries.
- What is part of the purpose: To reach a draft vision of a model for utilizing state aid to public libraries funding for equitably and accountably distributed services to Michigan public libraries that will meet the local and regional needs of all Michigan residents and public library users.

In order to ensure that every committee member was aware of all aspects of the discussion to date, I presented a slide show that enumerates the varied perspectives,

concerns, and ideas on the subject, including points related to equity, accountability, arguable state funding, core state funded services, statewide/regional programming, shared systems, regionally provided core services, cooperative services, town meeting results, cooperative/regional boundaries, change, consolidation/efficiency, cooperatives' varied dependence on state funding, some possible models, and the process for discussion and moving forward. The slide show can be found in its entirety at: [www.michigan.gov/lma](http://www.michigan.gov/lma)

Additional points that came out in the brief discussion that followed the presentation were the fact that the diversity and disparity of what the cooperatives provide would pose challenge; the need for all concerned to focus on what is needed and wanted without feeling constrained in their visioning by the Public Act currently in place; and that the primary focus for all of us involved in addressing the situation is preserving and/or enhancing the provision of library services to Michigan's residents.

HAL Deputy Director Mark Hoffman then presented the likely perspective(s) of the Michigan Legislature and Administration policy-makers relative to state aid to public libraries and any proposed new model. He emphasized that we would serve ourselves well to develop a model that can be explained simply and keep in mind that those powers-that-be will respond most positively to:

- Ends that will benefit their communities
- Ends that they would like to take ownership of
- Ends that demonstrate consolidation/reform/collaboration
- Ends and successes that will be measurable and visible to residents
- Consistency, advancing the economy, moving us to high tech capabilities

Obviously, we are advised to create a model for state aid that will meet the perspective and expectations of policy-makers, since funding depends on their understanding and support for whatever legislation is presented.

The facilitators broke the group out into three table teams. The discussions, brainstorming and reporting-out that followed resulted in some eye opening, "aha" moments for the group.

One table was assigned to report on their listing of what is and is not working relative to the current library cooperatives. The services or factors listed in the success column by some were identified and listed in the "not working" column by others. Examples of things that wound up in both the positive and negative columns are: use of swing/indirect state aid; delivery services; shared ILL; leadership; continuing education; communication; grass roots advocacy.

As we all do, each member of the group had arrived that morning with his/her own perspective on cooperatives firmly in mind. This first exercise resulted in everyone stretching their view to encompass the picture of cooperatives generally, not just their experience with their own cooperative. The committee realized at that moment that the

visioning process needed to be based in upon recognition that all cooperatives are not created equal. They have evolved into a combined system that lacks consistency and equity in its distribution of services to public libraries and hence to the residents of Michigan.

Another table identified current services Michigan residents experience because of state funding. Of course, the list included things like statewide and regional resource sharing; aggregate purchasing discounts for materials; technology support; delivery; e-rate application assistance for libraries/connectivity for patrons; and all aspects of the Michigan eLibrary (MeL). The flip side of the assignment for this group was to look at the identified services and articulate the potential negative impact for Michigan's residents if funding for them were removed.

The list was not long, but it was sobering: fewer materials; reduced hours and staff at public libraries; inequity in the provision of public library services statewide, including limited connectivity and access to online resources and services; and, finally, Michigan residents would be forced to rely exclusively on their own local public library and the services provided there, which for those that are not sufficiently funded locally would mean relying on insufficient resources or, in some instances losing those resources altogether. Not surprisingly, this discussion resulted in committee agreement on the ongoing need for state funded, state coordinated support for much of the library service received by Michigan's residents.

The third table team began to define a "guiding principle" for the committee's work in envisioning a new model for distribution of state funded services to public libraries and Michigan residents. They defined three basic benchmarks of service that need to be incorporated into the guiding principle as it is developed: equity for libraries and residents; efficiency; and cost effectiveness.

The committee's afternoon work began by defining common core services that might be provided with state funding, keeping the draft guiding principle components in mind. Three groups brainstormed and reported out to the whole group that continued the larger discussion and came to consensus on what regional and/or statewide core services for public libraries should be funded by state dollars in the future:

- Residents' access to books and materials through statewide reciprocal resource-sharing systems
- Delivery of books and materials
- Access to electronic resources such as databases
- Connectivity/Broadband

Finally, the same small groups were charged with creating visual models that demonstrate how those defined state funded services could be distributed with accountability built into the process. These were not finalized by any means, but I think I can safely say that the three models that resulted were not outcomes or proposals that

could have been envisioned at the beginning of the day by any of those of us involved.

In preparation for the next meeting's discussion, the group ended the day by raising questions about the meaning of equity in distribution of state funded services for public libraries. Some examples of the questions raised about equity were:

- What does it mean?
- From whose viewpoint?
- How is equity defined for a funding approach?
- What is the balance between local control and state funding?
- How do we ensure everyone gains value?

Prior to the October meeting, the facilitators provided the committee members with "homework" assignments. As the guiding principle was not fleshed out completely in the September meeting, we were charged with editing the draft principle. And building upon the core services defined at the first meeting, our other "homework" was to identify how each of those could be measured with regard to the draft guideline components of efficiency, cost effectiveness, and equity in funding and resource distribution. We were also encouraged to add other appropriate outcomes and define the method(s) for measuring them.

Our goals for the second meeting were to finalize the outcome and success measures for services; define for ourselves the concept of equity in funding and distribution of services to libraries and residents; and to define an accountability model to build on and plan details from in the future. Unfortunately, three of our original committee members were not able to participate in the second meeting, but we had one replacement and the additional participation of one member who had been absent from the first meeting, so it all evened out. Unfortunately, the two who had not been at the first meeting were at a disadvantage, having missed experiencing the evolution of the conversation and decisions that got us to the starting point of the second meeting.

The meeting notes as posted show the collective listing of ideas for measuring core services with regard to efficiency, cost-effectiveness, and equity. Additionally, the group added two more possible core services – training (for library staff and for residents) and statewide awareness about public library resources and services.

One of the table teams honed the draft guiding principle. They engaged in a lively and informed discussion based on the principles defined at the first meeting and everyone's "homework" edits of the draft. The larger committee discussed and approved the table team's proposed guiding principle statement:

***In addition to locally-funded public library services, all Michigan residents will have access to regional and statewide resource sharing and electronic information sources which would not be feasible or cost-effective on an individual library basis.***

The larger committee also discussed and approved another table team's proposed definition of equity:

***All residents have access to essential state-funded core services.***

Keeping these approved statements in mind, the table teams were charged with reviewing the three draft accountability models from the first meeting. They were given the option to select one of them to build on or to start from scratch and create a brand new model based on the evolution of the second day's discussion.

Three new models were put forth, although they certainly incorporated some of the innovative and basic attributes of the three original draft models. It would have been simplest if the three models that evolved were perfectly aligned in intent and design. Although that did not exactly happen, there were elements of pretty general consensus:

- The state will put one tier of the state aid funds toward the costs of providing three core statewide services. Public libraries will utilize another tier of the funds to provide the other core services by purchasing them independently
- Membership in a library cooperative is optional. (Membership is a decision made on a library-by-library basis and is not a pre-requisite for receiving state aid dollars)
- Oversight and accountability are included (i.e. essential)
- Planning element for the future for libraries in the state is included, with an understanding that such planning will include broad participation by the various library constituent groups extant at the time of the planning
- The model does not (and will not at this point in time) define specifics or details about exact percentage breakdowns or formulae for funding vis-à-vis state aid to public libraries, actual reporting mechanisms, or planning calendars or implementation.
- The model(s) will need an accompanying summary document to explain the change(s) from the present model and the underlying reasoning.

Agreed upon points of concern were:

- If library cooperatives are considered to be service providers/vendors, their status as governmental entities may change.
- There will be a need for a transition plan and timeline between the current model and the implementation of the model for the future
- [NOTE: These and several other concerns are not meant to be incorporated into the proposal at this time. They were acknowledged via a retrospective review of the initial slide show compilation of issues, perspectives, concerns, and potential options. That review demonstrated that actual implementation of any proposed new model and/or any revised or new legislation will need to consider things such as: the funding formula; keeping currently active and effectively functioning cooperatives harmless until a new structure is in place; addressing the issue, where necessary, of the distribution of current common

assets and/or methods for consolidation or dissolution of cooperatives; continuity of pension funds for library cooperative directors and staff; among other things.]

The majority of the committee agreed that one model best met the most agreed upon needs and intent. Everyone acknowledged that it still needed to be adjusted to incorporate some of the attributes of the other two. Since time was limited, we could not pursue the conversation needed to combine the three proposed models into one final model. So we asked for a few volunteers to take these basic agreements about similarities in the models and agreed upon concerns and, using the selected base model, continue the discussion soon and propose a combined model. They have since completed their somewhat daunting task and have submitted their model to me. I have reviewed their work and had some fruitful discussion with them about how they arrived at their combination model. With a few final tweaks intended to align the model with as much of the committee's consensus conversation as possible, here is what I propose to the Michigan public library community for your consideration and comment:

#### MODEL URL

As I have said before, many thanks are due to each one of the advisory committee members. I believe that none of them, and I know that certainly includes me, could have initially envisioned what has evolved so collaboratively and thoughtfully from the advisory committee meetings and brainstorming. Please note that while the model proposed here for comment is truly informed by the deliberations of the advisory committee, this final proposal is coming from me and the Library of Michigan.

I encourage you to evaluate the proposal objectively and take the time to voice both positive responses and negative concerns about what is now on the table. This opportunity for comment was, after all, the end goal of this most recent process. All of it will be into consideration and will help to facilitate the next steps necessary for defining revised or new legislation and nailing down details for the final implementation of any legislated proposal in the coming months or years.

Nancy