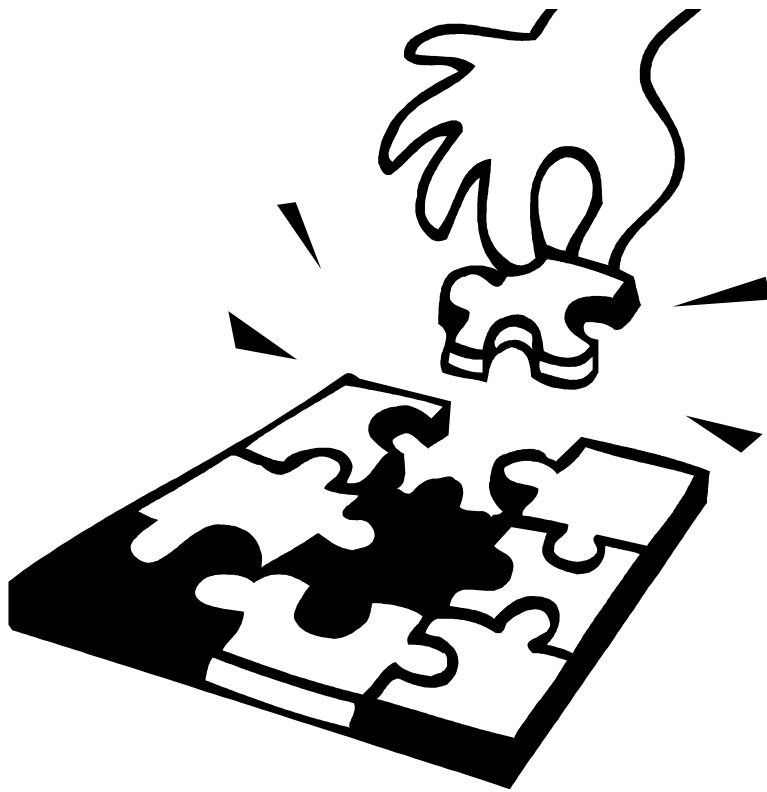


PUTTING THE PIECES TOGETHER



**A STRATEGIC PLAN FOR PUBLIC LIBRARY
SERVICES IN GEORGIA**

2001/2004

EXECUTIVE SUMMARY

The Planning Process

The 57 public library system directors and staff from the Office of Public Library Services worked together over a three-month period to identify the information and recreation needs of the people who live in Georgia and to develop a strategic plan to assist public libraries across the state to work together to meet those needs.

The Goals

1. Preschool children in Georgia will develop a love of reading and learning and enter school with the skills needed to succeed.
2. Children and teens in Georgia will have the services and programs they need to pursue their personal interests, to encourage their self-development, and to make informed decisions.
3. Children and teens in Georgia will have ready access to a wide variety of programs and materials to meet their recreational and cultural needs.
4. Adults in Georgia will have access to programs and materials on a wide variety of topics to address their need for seamless lifelong educational opportunities and their desire for personal growth.
5. Adults in Georgia will have ready access to current materials in a variety of formats to satisfy their interests in popular culture and current trends and to fulfill their desire for enjoyable recreational experiences.
6. All Georgians will be able to get answers to their questions on a broad array of topics related to work, school, and personal life.
7. All Georgians will be able to find, evaluate and use information effectively.

State Budget Priorities to Accomplish the Goals

- Materials
- Services and programs for preschoolers, children, and teens
- Training for staff and the public
- Technology support and maintenance
- Marketing library services and programs

These budget priorities are program-based and do not address concerns about the formulae used to determine the allocation of state-funded positions for public libraries. Neither do they provide financial incentives to encourage counties to remain in multi-county systems or to encourage single counties that lack the resources to provide quality public library services to join multi-county systems. These issues will have to be addressed before the outcomes identified in this plan to be achieved.

INTRODUCTION

In early 2000, the Office of Public Library Services (OPLS) in the Department of Technical and Adult Education (DTAE) initiated a statewide strategic planning process for Georgia's public libraries. The planning process was based on the standard public library planning model *Planning for Results: A Public Library Transformation Process* (American Library Association, 1998) and was designed to:

- Identify the information needs of the people of Georgia and define how public libraries and OPLS can work together to meet those needs
- Be results based and include measurable objectives so that progress toward meeting the goals can be monitored
- Identify the types of resources (staff, facilities, collections, technology) needed to accomplish the goals and objectives
- Develop criteria for determining state, local, and joint funding priorities for public libraries

Participants and Timeline

All of the 58 public library system directors in Georgia were involved in every step of the planning process, as were staff members from the Office of Public Library Services. The process was facilitated by Sandra Nelson, a consultant from Tennessee with considerable experience coordinating public library planning efforts and statewide planning initiatives.

The planning participants met four times during the planning process and reviewed and revised documents between each of the first three meetings.

- February 17, 2000 (Conyers)
Review the planning model, define current conditions in Georgia public libraries, and discuss the process of change.
- February 24-25, 2000 (Augusta)
Develop a vision for the future of Georgians, define current conditions in Georgia, and identify what needs to happen to move closer to the vision. Decide which needs Georgia public libraries can help meet and develop draft goals, objectives, and activities to meet those needs.
- March 23-24, 2000 (Athens)
Review and revise goals, objectives, and activities. Define state, local and joint priorities for funding public library services. Develop cost estimates for the activities and select those to include in the state budget request for public libraries.
- May 17, 2000 (Macon)
Final review of goals, objectives, activities, and budget.

Public Library Service Priorities

The participants in the planning process developed a strategic plan that focuses on the services and programs that public libraries can provide to meet information, education, and recreation needs of all Georgians. There was general agreement among the participants about the five most important library priorities:

- To help preschool children develop a love of learning and to enter school ready to learn.
- To help children and adults pursue self-directed personal growth and development opportunities.
- To help all Georgians find information and answers to questions on a broad array of topics related to work, school, and personal life.
- To help all Georgians develop the skills they need to find, evaluate, and use information effectively.
- To help children and adults find materials and programs about popular cultural and social trends and to provide them with satisfying recreational experiences.

Budget

As a part of the planning process, the participants discussed state, local, and joint funding priorities for public libraries. Their preliminary recommendations can be found in Attachment 1. Based on those recommendations, the participants decided to request state funding for the following items to achieve the goals and objectives in the strategic plan.

- Materials
- Services and programs for preschoolers, children, and teens
- Training for staff and the public
- Technology support and maintenance
- Marketing library services and programs

The actual budget recommendations are divided into three categories, in priority order. The highest priority items total \$1,500,000, or 5% of the current state budget for public libraries. The items on the second priority list total an additional 5% or \$1,500,000, as do the items included on the third priority list. It would require a total of \$4.5 million in state monies to fund all of the items on all three priority lists.

There are several basic concerns about the formulae used to determine the allocation of state funds for public libraries that were not addressed in this planning process. The two most serious are the inequities in the funding formulae for state funded positions and the lack of financial incentives to encourage counties to become multi-county systems or single counties to join a multi-county system. Attachment 2 provides more detail about these issues.

There has been ongoing discussion about how to address these inequities. One solution is presented in the Raise Up program, which was developed last year but has not been funded. Whether through the Raise Up program or through some other mechanism, it is critical that these underlying fiscal issues be addressed. The goals and objectives in this strategic plan are predicated on the assumption that the public library systems in Georgia have in place the basic infrastructures required to deliver the services described here.

GEORGIA PUBLIC LIBRARIES GOALS AND OBJECTIVES, 2000-2004

Goal 1: Preschool children in Georgia will develop a love of reading and learning and enter school with the skills needed to succeed.

- 1.1 In 2001, a total of at least 350,000 preschool children will attend programs sponsored by Georgia public libraries and the total number of children who attend such programs will increase by at least 1,200 each year thereafter.
- 1.2 By 2004, at least 80% of the parents or caregivers of preschool children who attend programs presented by Georgia public libraries will rate those programs as “very good” or “excellent.”
- 1.3 Beginning in 2001, at least 222 of the 370 public library facilities in Georgia will conduct a minimum of 24 programs for preschool children each year, in addition to the programs offered during the Vacation Reading Club.

Goal 2: Children and teens in Georgia will have the services and programs they need to pursue their personal interests, to encourage their self-development, and to make informed decisions.

- 2.1. During 2001, a total of 650,000 children between the ages of five and twelve will attend programs sponsored by the Georgia public libraries and that number will increase by 10% each year.
- 2.2. During 2001, a total of 15,000 teens between the ages of 13 and 17 will attend programs sponsored by the Georgia public libraries and that number will increase by 2% each year.
- 2.3. By 2004, at least 25% of the children and teens in Georgia will have a card at their local public library.
- 2.4. By 2004, at least 75% of the children and teens who receive services from Georgia public libraries will rate those services as “very good” or “excellent.”

Goal 3: Children and teens in Georgia will have ready access to a wide variety of programs and materials to meet their recreational and cultural needs.

- 3.1. During 2001, the number of individual children and teens who participate in the Georgia public library Vacation Reading Program will increase from 194,233 to 198,300 and the number will increase by at least 2% annually thereafter.
- 3.2. In 2001, children and teens in Georgia will borrow at least 12,000,000 items (an average of six per child/teen), and the number of items borrowed by children and teens will increase by at least 250,000 each year thereafter.

Goal 4: Adults in Georgia will have access to programs and materials on a wide variety of topics to address their need for seamless lifelong educational opportunities and their desire for personal growth.

- 4.1. Between 2001 and 2004, the number of print and non-print items borrowed from Georgia public libraries will increase from 34,422,000 (4.56 per capita) to 35,110,000.
- 4.2. Each year, at least 75% of adult users will indicate that they are satisfied with the public library materials that they found to meet their need for educational experiences or personal growth.
- 4.3. During 2001, the number of times that Georgians log-on to GALILEO through their public libraries will increase from 293,000 to 440,000 and that number will increase by 10% annually thereafter.

Goal 5: Adults in Georgia will have ready access to current materials in a variety of formats to satisfy their interests in popular culture and current trends and to fulfill their desire for enjoyable recreational experiences.

- 5.1. Each year, at least 75% of adult users will indicate that they found current materials that met their needs when they visited their local public library.
- 5.2. Between the years 2001 and 2004 the number of adult fiction books and media items borrowed for all ages will increase from 14,800,000 to 15,540,000.

Goal 6: All Georgians will be able to get answers to their questions on a broad array of topics related to work, school, and personal life.

- 6.1. During 2001, Georgians will visit Georgia public libraries at least 22,300,000 times (almost 3 visits per capita) and that number will increase by at least 1,100,000 people each year thereafter.
- 6.2. During 2001, staff in Georgia public libraries will help the public find answers to at least 4,100,000 reference questions (asked in-person, by telephone, or via email) and the number of questions asked will increase by at least 250,000 annually thereafter.
- 6.3. During 2001, the number of searches performed by people logged on to GALILEO through their public libraries will increase from 352,000 to 528,000 and that number of searches will increase by 10% annually thereafter.
- 6.4. By 2004, at least 75% of people who used Georgia public libraries to get answers to their questions will say that they received the information they needed.

Goal 7: All Georgians will be able to find, evaluate and use information effectively.

- 7.1. Each year, Georgia public libraries will present at least 500 programs in locations around the state to help people learn to find, evaluate, and use information.
- 7.2. Each year, at least 75% of the people who attend programs presented by Georgia public libraries to help them learn to find, evaluate, and use information will rate those programs as “very good” or “excellent.”

BUDGET REQUEST FY 2000/01

FIRST PRIORITY (Represents a 5% increase to the FY 2000/2001 budget)

PURPOSE	AMOUNT	SUBTOTAL
PRINT, NONPRINT, AND ELECTRONIC MATERIALS		
<ul style="list-style-type: none"> • Increase the per capita support by \$.07 to purchase materials for preschoolers, children, teens, and adults (supports objectives 1.3, 2.4, 3.1, 3.2, 4.1, 4.2, 5.1, 5.2) 	\$500,000	\$500,000
SERVICES AND PROGRAMS FOR PRESCHOOLERS, CHILDREN, AND TEENS		
<ul style="list-style-type: none"> • Hire a Teen Services Coordinator at OPLS (supports objectives 2.2, 2.3, 2.4, 3.1, 3.2) 	\$55,000	
<ul style="list-style-type: none"> • Upgrade the Children's Consultant position to Children's Coordinator (supports objectives 1.1, 1.2, 1.3, 3.1, 3.2) 	\$10,000	
<ul style="list-style-type: none"> • Hire one paraprofessional staff person to support the provision of services to teens and children (supports objectives 1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2) 	\$35,000	
<ul style="list-style-type: none"> • Expand the Vacation Reading Club to serve more children, including preschoolers and teens, and market the program more effectively (supports objectives 1.1, 1.2, 3.1, 3.2) 	\$140,000	
<ul style="list-style-type: none"> • Develop and support year-round programming for preschoolers, children, and teens (supports objectives 1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 3.2) 	\$100,000	\$340,000
TRAINING FOR STAFF AND THE PUBLIC		
<ul style="list-style-type: none"> • Develop an online training module to help both the public and library staff learn to use GALILEO more effectively (supports objectives 4.3, 6.3, 7.1, 7.2) 	\$75,000	
<ul style="list-style-type: none"> • Work with Board of Regents schools to develop and deliver a distance learning program for library para-professional and professionals (supports objectives 1.1, 1.2, 1.3, 6.2, 6.4, 7.1, 7.2) 	\$200,000	\$275,000
TECHNOLOGY SUPPORT AND MAINTENANCE		
<ul style="list-style-type: none"> • Divide the state into ten technology districts and hire a minimum of 5 technology support staff; provide travel expenses, needed equipment and supplies (5 @ \$77,000) (supports objectives 4.3, 7.1, 7.2) 	\$385,000	\$385,000
TOTAL		\$1,500,000

SECOND PRIORITY (These items would be requested in addition to the items on the *First Priority* list and represent a total increase of 10% to the FY 2000/2001 budget)

PURPOSE	AMOUNT	SUBTOTAL
PRINT, NONPRINT, AND ELECTRONIC MATERIALS <ul style="list-style-type: none"> Increase the per capita support by an additional \$.07 to purchase materials for preschoolers, children, teens, and adults (supports objectives 1.3, 2.4, 3.1, 3.2, 4.1, 4.2, 5.1, 5.2) 	\$500,000	\$500,000
MARKETING LIBRARY SERVICES AND PROGRAMS <ul style="list-style-type: none"> Hire a Marketing Coordinator at OPLS; provide funds to produce print, media, and electronic marketing programs (supports objectives 1.1, 2.1, 2.2, 2.3, 3.1, 4.1, 4.3, 5.2, 6.1, 7.1) 	\$115,000	\$115,000
TECHNOLOGY SUPPORT AND MAINTENANCE <ul style="list-style-type: none"> Hire an additional 5 technology support staff; provide travel expenses, needed equipment and supplies (supports objectives 4.3, 7.1, 7.2) Expand GALILEO databases (supports objectives 4.3, 6.2, 6.3) 	\$385,000 \$500,000	\$885,000
TOTAL		\$1,500,000

THIRD PRIORITY (These items would be requested in addition to the items on the *First Priority* and *Second Priority* lists and represent a total increase of 15% to the FY 2000/2001 budget)

PURPOSE	AMOUNT	SUBTOTAL
PRINT, NONPRINT, AND ELECTRONIC MATERIALS <ul style="list-style-type: none"> Increase the per capita support by an additional \$.07 to purchase materials for preschoolers, children, teens, and adults (supports objectives 1.3, 2.4, 3.1, 3.2, 4.1, 4.2, 5.1, 5.2) 	\$500,000	\$500,000
SERVICES AND PROGRAMS FOR PRESCHOOLERS <ul style="list-style-type: none"> Develop an expanded program to serve preschool children (supports objectives 1.1, 1.2, 1.3) 	\$100,000	\$100,000
TECHNOLOGY SUPPORT AND MAINTENANCE <ul style="list-style-type: none"> Purchase “people counters” for each public library outlet in Georgia (300 @ \$500) (support objectives 6.1) Fund additional PINES sites (supports objectives 3.2, 4.1, 5.2) 	\$150,000 \$750,000	\$900,000
TOTAL		\$1,500,000

GENERAL FUNDING PRIORITIES

On 3/24/00, the Georgia system directors identified the types of services that should be funded primarily with state funds, the types of services that could effectively be funded jointly with state and local monies, and the types of services that were most appropriately funded at the local level. This is a preliminary list and will need to be discussed further and refined.

STATE FUNDING PRIORITIES

1. Stabilize and continue current level of support for ongoing technology initiatives
 - 1.1. GALILEO
 - 1.2. PINES (expanded to include a statewide MARC database)
 - 1.3. SAMSON
 - 1.4. Internet access and telecommunications support
 - 1.5. Technology staff to help local staff maintain and support these services
2. Equalize public library services statewide (see Attachment 2 for more information on equalization issues)
 - 2.1. Support multi-county cooperatives and provide incentives for counties to remain in such cooperatives or to join a cooperative if the county lacks the local funding required to provide quality public library services.
 - 2.2. Provide staffing in rural libraries
 - 2.3. Equalize metropolitan library staffing inequities
 - 2.4. Create a commonality among all public libraries in the state
 - 2.5. Provide maintenance and operation funds
 - 2.6. Provide funds to purchase library materials
3. Initiate innovative programs and fund demonstration projects
4. Encourage resource sharing
5. Provide state library staff with skills and expertise in these areas:
 - 5.1. Children's coordinator
 - 5.2. Young adult services coordinator
 - 5.3. Continuing education/training coordinator
 - 5.4. Marketing and development coordinator (includes grant writing)
 - 5.5. Interagency cooperation coordinator

JOINT STATE AND LOCAL FUNDING PRIORITIES

1. Programs that encourage local funders to increase support by requiring a match
 - 1.1. Materials match
 - 1.2. Construction funds (90% state-10% local)
 - 1.3. Major renovation and repair funds (90% state-10% local)
 - 1.4. Net lending reimbursement
2. Programs that require or benefit from statewide cooperation
 - 2.1. Vacation reading program
 - 2.2. Other programming for children and adults
 - 2.3. Marketing and public relations activities
 - 2.4. Training for staff and public
3. Statewide database linking libraries using PINES and libraries with compatible circulation systems
4. Serve people with special needs
 - 4.1. Library for the Blind and Physically Handicapped
 - 4.2. Institutionalized services
 - 4.3. Alternative delivery methods (bookmobile, cybermobile, etc.)

LOCAL FUNDING PRIORITIES

1. Local staff
2. Operating funds beyond the state grant
3. Services that meet specific local needs
 - 3.1. Local history and genealogy
 - 3.2. Special collections
4. Programming other than that supported by the state
5. Materials beyond those provided through the state grant
6. Local databases and equipment beyond that provided by the state

AN OVERVIEW OF FUNDING INEQUITIES IN GEORGIA'S FORMULAE FOR PUBLIC LIBRARIES

1. **Problem:** State monies are used to fund a certain number of public library positions in Georgia. The largest metropolitan systems (Fulton, Cobb, DeKalb, Gwinnett, CEL-Savannah, and East Central-Augusta) are restricted to no more than six positions; five of those positions are based on population, regardless of the number of people served, and the sixth is the position that each county receives. This is unfair when compared to many multi-county systems which serve fewer people get but more positions because of the number of counties served.

Formula: A library system (either single county or multi-county) shall receive a state-paid position (approximately \$35,000 plus benefits) for each county in the system plus another position for every complete unit of 50,000 population up to a five position maximum (for population).

Examples:

- Single-county system with a population of 700,000 will get six positions.
- Multi-county system with seven counties and a population of 700,000 will get twelve positions.
- Single-county system with a population of 149,999 will get three positions.
- Multi-county system with five counties and a population of 29,845 will get five positions.

2. **Problem:** The so-called *Miss Wessie Caveat* essentially grants to all systems with less than 50,000 population a 2nd position and the requirements to retain such positions are not enforced.

The *Miss Wessie Caveat* (established about 15 years ago): When a system (single county or multi-county) with a population of less than 50,000 has twice the minimum level of support, it shall earn an additional position.

- The minimum level of support required when the *Miss Wessie Caveat* was established was a base of \$35,000 (local funds) plus \$1 (also local) for any person over a population level of 20,000, but under the 50,000 limit to the system. The base was raised to \$100,000 in 1998; the \$1 per person between the population levels of 20,000 and 50,000 remains unchanged.
- Before the minimum base figure was raised to \$100,000, the *Miss Wessie Caveat* was used to grant positions to approximately 14 systems. Many of these systems did not meet the new *Miss Wessie Caveat* level of support requirement but were allowed to retain the positions that were allocated before the change.

3. **Problem:** There are no financial incentives to encourage counties to establish multi-county systems or to encourage single counties that do not have the local resources required to provide quality public library services to join multi-county systems. This

reduces the opportunity to maximize efficiency in service delivery by exploiting economies of scale.

- The *Miss Wessie Caveat* permits a county that is presently in a multi-county system and that has the required local support to meet the *Miss Wessie Caveat* to withdraw from the system and obtain approximately \$100,000 in State funds for professional positions. In other words, this provision provides an incentive for counties to withdraw from systems with no requirement to continue increased spending on libraries. Once a position has been granted it is perpetual whether the minimum level of local support is maintained or not. Additionally, the amount of the minimum level of support is not raised annually, which circumvents the original intent of *The Miss Wessie Caveat*.
 - There is no funding program to encourage counties to join multi-county systems and there is no financial incentive for rich counties to encourage poor counties to join them in a multi-county system. As a result, any potential efficiency to be gained from multi-county systems is compromised.
4. **Problem:** There are no incentives for systems (single county or multi-county) to increase local funding.
 5. **Problem:** There are many counties without the economic infrastructure to provide even one employee in the library for 40 hours per week.
 6. **Problem:** Many material purchases are at a fixed price (encyclopedias, databases, periodicals, newspapers, etc.) which makes the present materials grant less effective to those counties that have low populations because the materials formula is based primarily on a per capita distribution of funds.