

**Public Library Service  
for All:  
A Report from the  
Summit on the Unserved**

**Illinois State Library  
November 2-3, 2000**

Jesse White  
Secretary of State and State Librarian

Jean Wilkins, Director  
Illinois State Library



## OFFICE OF THE SECRETARY OF STATE

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JESSE WHITE • Secretary of State

February 2001

Dear Friends,

Nearly one million Illinois residents are without tax-supported public library service. As State Librarian, I am aware of the importance of library service for people of all ages, income levels, economic conditions and education. Libraries offer so much to all the people of Illinois and are an important aspect of the life-long education process.

I appreciate and value the work of the participants at the Summit on the Unserved in October 2000 to address the long-standing issue of the unserved. As a result we have clear direction on the next steps to take in achieving public library service for all.

Sincerely,

A handwritten signature in cursive script that reads "Jesse White".

JESSE WHITE  
Secretary of State  
and State Librarian

### **Executive Summary**

The director of the Illinois State Library/Office of the Secretary of State, Jean Wilkins, convened a summit on October 2 & 3, 2000 to address the issue of nearly one million Illinois residents without tax-supported public library service. Seventy librarians, public library trustees, government officials, unserved residents and others with interest in the issue participated in the summit. A public hearing was held at the end of the first day of the summit to gather broad input on the topic, and written comments were also solicited.

At the end of the two-day meeting, summit participants identified top recommendations for follow-up by the Illinois library community. These recommendations included:

- Develop an action plan for statewide universal service and a plan for legislative action to mandate tax-supported public library service.
- Address funding reform for library service.
- Allow non-contiguous annexation by parcel or community through a change in public library legislation.
- Hold public hearings throughout the state to provide an opportunity to hear from the unserved.
- Work with real estate associations to require disclosure on whether or not public library service is included for residential real estate.

The consensus of the summit was clear: to achieve statewide tax-supported public library service. Follow-up efforts will be a priority in identifying specific action steps to be taken. The Illinois State Library will appoint an implementation group to develop an action plan by October 2001.

## Background

Although 645 public libraries provide service to 11 million plus Illinois residents, 700,000 residents remain without tax-supported public library service. Some unserved areas of the state have voted against annexation to a library service area; other areas cannot be annexed readily by municipalities. The persistent problem of the unserved has been discussed during the past 30 years with no clear solution in sight. Non-residents are unhappy when they are told about the General Assembly-mandated non-resident card fee.

Initiatives in past years to address the unserved issues included:

- **Project PLUS** (Promoting Larger Units of Service), a federal grant-funded demonstration program designed to promote the expansion of public library service. During the 22 years of Project PLUS (FY72-FY93), 682,386 people were added to public library service areas. During this time, 42 referenda (28%) were defeated at the polls.
- **The Libraries on the MOVE conference** in 1986, co-sponsored by the Shawnee Library System and the Illinois State Library. The conference focused on how libraries can have a positive impact on the economic development and culture of an area. The resulting *Agenda for Rural Development* included a recommendation that a statewide, comprehensive plan for making library service available to everyone should be developed.
- **Project LIME** (Library Mergers), another federal grant program to promote the merger of public libraries and any unserved area in-between. Interest in Project LIME was limited but did lead to the establishment of the Indian Prairie

Public Library District, a merger of the libraries in Darien and Willowbrook in 1988. Public libraries in Bowen and Augusta also merged.

- **The Illinois State Library Task Force on Rural Library Services.** The task force issued a report in 1989 with a recommendation that the State Library continue to support demonstration projects for expanding library service.
- **The Rural Library Panel,** appointed by Secretary of State George Ryan in 1992. This panel included a recommendation that all Illinois citizens have public library service. The panel held public hearings throughout downstate Illinois as part of its data-gathering efforts.
- **Library cards for all children.** "Cards for Kids" ideas have been considered by the Illinois State Library and library systems.
- **Regional demonstration grants,** funded with federal funds. Grants were awarded to five regional library systems in 1995 and 1996 for the purpose of expanding library service in the region.
- **Regional planning panels.** The planning panels, established under state law enacted in 1995, were directed to submit plans to the Illinois State Library/Office of the Secretary of State detailing how existing library service providers may extend public library services to those people currently unserved by a public library. The recommendations from the 30+ panels varied widely, in part due to differences in geographic location.

Despite considerable interest in addressing the unserved issue, no clear consensus emerged on how to proceed.



With Secretary of State Jesse White's concern about the number of unserved, his staff at the Illinois State Library turned their attention to this problem.

### **The Summit on the Unserved**

Jean Wilkins, Director of the Illinois State Library, convened a summit meeting October 2-3, 2000 to address the unserved issue. The summit was held at the Illinois State Library in Springfield. The 12 regional library system directors nominated the majority of the invitees. Invitees provided broad representation in terms of geographic location and a mixture of librarians, board members, unserved and special interests such as the agricultural community. Library system directors and staff assisted the State Library in staffing the conference.

Following a welcome from the Illinois State Library Director, the Summit on the Unserved began with a panel discussion on issues and ideas for addressing the unserved. Panelists included:

- Nancy Buikema, School Media Specialist, Fulton Community Unit School District, Fulton
- Sharon Campbell, Public Library Consultant, Shawnee Library System, Carterville
- James Howard, President, Lincoln Land Community College, Springfield
- Nicole Snoblin, resident of an unserved area, Lake Bluff
- Jim Ubel, Director Emeritus, Shawnee Library System, Carterville
- Jean Wilkins, Director, Illinois State Library, moderator.

The panelists touched on a number of issues and ideas, with particular interest in 1) the process that was followed in establishing statewide community college service and 2) the

effort to establish a library services district so that the Lake Bluff Public Library can provide services to an adjacent unserved area.

State Rep. Gwenn Klingler discussed the panelists' comments and talked about the issues the General Assembly would need to address in expanding public library service.

### **Summit Discussion Topics**

Following the panel, summit attendees were divided into seven groups to discuss major issues relating to the unserved. Each group had the opportunity to discuss every topic. In order to maintain continuity, a regional library system director, assisted by State Library and system staff, facilitated discussion of each issue throughout the two days. As the summit progressed, the groups built on preceding discussion(s).

A summary of the discussion on each topic follows:

- 1) What are the overriding principles that need to be addressed regarding solutions to the unserved? Prioritize these principles.**

The philosophical idea that everyone has a right to public library service emerged very strongly.

The idea of a strategic plan for solving the unserved problem also materialized. Specifically, summit participants noted that when the number of unserved decreases to a certain point, resistance in the legislature will not be a factor. As a result, the recommendation was for research to determine "the point" and that a number of supporting activities

be initiated immediately to reduce the number of unserved to meet the "magic point." This became the overriding recommendation of the discussion groups.

Early in the discussion, the possibility was mentioned that the Internet and electronic communication had the potential to change the parameters of what it means to serve the unserved. The following groups noted this, but it did not make the list of issues of importance.

**2) Are non-resident cards workable in the 21<sup>st</sup> century? Should we forget about this piecemeal approach to library service in unserved areas? Are system-wide cards an answer?**

The following were continuing refrains from the discussions:

- Non-resident cards should only be used as an interim answer, for an additional five years maximum. They should be for local use only, using the tax bill method for calculating the non-resident fee.
- Tax support for public library service should be mandated.
- Every citizen should be placed in a public library service area (LSA) with a variety of possible providers in the area. The LSA governing body could determine the provider of the library service for a defined area.
- Property tax should continue as the base of support for public library funding but support from other sources is needed as well; e.g. sales tax, etc.
- Universal service is needed while simultaneously keeping local control.
- Non-contiguous areas should be allowed to annex into a library service area. Annexation should be allowed by parcel.

**3) Should we look at different solutions for different areas of the state? Or is a "one size fits all" solution a rational goal? What are the special needs of different parts of the state that need to be addressed by the overall solution(s)?**

There was general consensus that more research was needed to see what solution or solutions would work. The groups discussed the possibility of enabling legislation with funds distributed through systems to address specific local needs.

Likewise, the community college model in extending service statewide was viewed with favor. Providing library access to everyone was viewed as a necessary and important step. Assigning current unserved areas to library service areas would be a good first step while also encouraging local initiatives.

In extending service statewide, a variety of funding sources would seem to be in order. Property tax, levied statewide, would need to be a main part of the solution because it ensures local control. A statewide property tax for libraries would also provide a base level for other funding.

There was also discussion about the pros and cons of a library-specific tax statewide, as a supplement to local property tax. Income tax was viewed as a possible source, looking at the Ohio model. It would take the burden off property taxes. Discussion also ensued about adding a "distance" component to the distribution of state funding.

The consensus was that access should be universal but differences in local needs should be addressed in devising the solution. No new library service areas are recommended; instead, existing service areas should be extended. Additionally, alternatives to the word, "mandate," should be used, such as "foundation level" or "universal."

- 4) **What are the biggest barriers to statewide public library service? What are the solutions for addressing the barriers?**
- **From the non-resident's perspective**
  - **From the resident tax-payer's perspective**
  - **From the library trustee's perspective**
  - **From the library staff perspective**
  - **From the perspective of staff from other libraries**
  - **From the perspective of local government officials**
  - **From the perspective of state elected officials**

The conversation in all groups was spirited and enthusiastic. The general feeling was that the biggest barriers had to do with fees, taxes, and a general confusion of what is included in a tax bill. Public libraries are NOT free, despite public perception to the contrary. A response from most groups identified a need to provide an education plan about the benefits of statewide public library service. This marketing and education plan would provide information for the general public as well as local government officials.

A strong recommendation was to set a uniform time for a statewide referendum for library service. Discussion included the idea that a

library system consultant could work for a two-year period to help with a marketing and promotion campaign.

The themes of research development and marketing were repeated in most sessions. Education also was a recurring theme. Trustees must be advocates in this process, but they must be educated and given the sound bites necessary to "sell" the idea. This training should be done at a local level. Education of local government officials would be important to this success of a referendum.

A mandate should only come with money associated with it. An independent source of funding that stays out of the political arena would be helpful. Other financial issues included equity and fairness of the tax rate and equity of financial support (how the non-residents pay should be equal to what residents pay for tax supported library service).

- 5) **Should statewide library services for children be the first priority? If so, what are the possible solutions?**

The consensus of the discussion sounded an emphatic rejection of the idea that children's service was the first priority. Universal public library service is the priority for all areas and all ages. Public libraries are from birth to death. Lifelong learning is vitally important. Don't fragment the family or choose one population segment over another. The essential goal of statewide literacy may be achieved only on an integrated family service model.

Another strong consensus was the recognition of the need for a major overhaul of Illinois school libraries, the education and certification of school librarians, and the state's woefully inadequate funding. In some



geographical areas, expanded use of school libraries may be a way to overcome the lack of a public library. However, many concerns were raised about the pitfalls of joint use facilities.

A third, trickier consensus was the agreement about the detrimental effect of providing "kids cards," school contracts, or summer-use only cards. The desire to facilitate usage was universally embraced. However, it was recognized that the political reality of an entitlement approach to children's service creates counterproductive outcomes (i.e. unfunded mandates).

**6) What can we do to encourage legislators, citizens in general, the unserved and the underserved to be more interested in public library service? How can we get citizens to value and provide funding for library service?**

Throughout the two days, there appeared to be near unanimous agreement to focus our energies and resources on obtaining universal service. Some of the means discussed were:

- Marketing. Citizens and legislators are generally not aware that some portion of the Illinois population does not live in the area of a tax-supported public library. This situation can be reversed by a well-organized, multi-pronged public relations effort. The message should be conveyed by all possible means including print, broadcast, cable and person-to-person (grass-roots) initiatives.
- Market research/visioning/message preparation. What essential services do libraries provide? What message will influence legislators and untaxed, unserved citizens to

vote for statewide or local library service? Libraries are not unlike other service businesses in that they are searching for whatever it is that distinguishes their service from a plethora of similar services.

Legislators and citizens won't simply vote for universal or local service because librarians are good people with a good cause. Rather, the need is to show why library service adds value to people's lives. An example is the rebirth of community colleges in the late 1980's to the early 1990's. At that time, they went from being two year preparatory schools for four year colleges to multi-faceted education agencies that support careers requiring two years of job training, literacy, adult education and also provide the first two years of college.

- Sequential steps aimed at achieving universal service. State Library programs or library community policies should be used to create an environment for a legislative push for universal service. For example, the Illinois library community still needs Project PLUS and needs it until the number of people who do not live in tax-supported public library districts is down to some low (but unknown) percentage of the State's population - 4% or 5%, for instance. In 5, 10, 15 years, when the number of people who are untaxed is minimized, by comparison the high number of people in library taxing districts will create the critical taxing mass needed to achieve legislation mandating library service.
- Lack of universal service limits library publicity and library service efforts. Because not all people in the State are in a public library district, the library community has a serious problem creating and marketing library services on a



statewide basis. It is challenging to make blanket statements about getting "service at your (public) library" because not everyone has library service. A vision of how state-level publicity, planning, and organization will improve library service, and library use is the crucial element in getting more support for universal service from the library community and state legislators.

**7) Based on the overview of the regional planning panel reports, prioritize your group's top five solutions for addressing the unserved issue. Why are these five solutions the best?**

The charge of looking at the regional planning panel reports provided the opportunity for a thorough review of the recommendations of those panels. From the first group to the last, all were in agreement that universal public library service is the desired outcome. There was not any real support for stopgap measures of universal service for children or any other specific age group. Most of the participants wanted to look at options that went beyond property tax to fund universal service, but there was no consensus to eliminate property tax. The stability and the issue of local control of the property tax was the driving factor for participants to recommend that this method of funding libraries be continued. There was consensus that some sort of additional funding from state sources was appropriate and the most desirable outcome. Over the course of the discussion, 15 cents was the consensus as a good base for the property tax.

A sentiment that continued to build during the discussions was the need for Illinois to do a more exhaustive

review of how other states fund public libraries. Ohio and Kentucky were mentioned as places to begin with, Ohio being a state that has a good funding base. However, studies should not be limited to those two states. Another sentiment that built during the discussion was for Illinois to further develop public libraries based on existing boundaries -- public library boundaries, community college boundaries, school district boundaries, or county boundaries. However, there was a sense that this part of the process does not need to be recreated. The groups also believed that local control was essential in public library service.

Early in the discussions there was a strong sentiment for the panel recommendation that library affiliation be part of all real estate listings. It was believed that buyers are often misled about what services are available when they purchase property.

Finally, there was some discussion regarding options on what property would be taxed for library service. One example discussed was taxing homesteads and not farmland. Further discussion determined that this is an issue beyond the scope of library service.

Overall, the consensus recommendations were:

- Achieve universal public library service through a combination of revenue sources with property tax as the base along with other state revenue as additional funding.
- Review public library funding in other states.
- Use existing jurisdictional boundaries to achieve universal service.
- Retain local control.

## Public Hearing

An opportunity for public input on the unserved issue was provided at the end of the first day of the summit. Since it was early in the summit, public comments were made at a key time to enlighten the summit participant discussions.

Seven people provided oral testimony at the hearing; their names are listed in Appendix B. Their testimony included the following major points:

- The General Assembly should make district library boundaries permanent, instead of allowing district libraries to be diminished due to municipal annexations.
- The State Library should provide 18-month demonstration grants, similar to the previous 12-month Project PLUS grants.
- District libraries should be allowed to annex non-contiguous territory.
- Many citizens of southern Illinois cannot afford nonresident fees; there must be a more equitable way to pay for library service.
- Southern Illinois is the poorest region in the state, and fewer people have access to libraries. There is a connection here.
- Universal public library service should be mandated.
- System-wide cards will preclude realization of universal library service.
- Librarians and library boards need to acknowledge that "optional taxation" is unfair to residents who must support the public library.
- Illinois's great, innovative library history and practice should be expanded to include true equity of access to information.
- Universal public library service is economically important to the

library industry and library development in the state.

## Written Comments

Thirty-five people or groups submitted written comments in response to a statewide press release from Secretary White. Comments from non-residents and the library community were wide-ranging and included the following themes:

- Senior citizens cannot afford non-resident fees.
- All Illinois residents should support library service through their taxes.
- Everyone should have free access to a library.
- Non-resident cardholders are considered second-class citizens.
- The community college model of expanding service statewide is an equitable model to follow.
- Libraries need more funding if they begin serving more patrons.
- Legislation should be pursued to enable a library district to annex by ordinance following a petition request.
- Senior citizen and public housing located just outside a library service area should be served.
- Consideration should be given to a township or county tax that would include library access.
- The Secretary of State should work actively with the Governor and General Assembly to provide more access to public library service.
- There is a great need for library service to everyone, which will require a change in the Illinois tax structure. The Illinois State Library should take the lead in making this occur.
- Everyone has access to a public library. If they're willing to pay, via property tax or non-resident fee,

they can also borrow materials. Someone has to pay.

- The state should look into alternative funding -- instead of property tax consider memorial funds, etc.
- Set a goal to make libraries affordable and available to everyone that lives in the state.
- Rural children of Illinois are already at a disadvantage when it comes to education. Make a library accessible to all.
- Any resident of Illinois should be allowed to ask to have his/her own tax bill adjusted to pay the library tax to ensure unlimited library access.
- The law that allows consideration of dissolving a library district every five years should be rescinded.
- More quantitative standards such as a minimum annual tax levy of \$125,000 for public libraries should be stated.
- The Illinois State Library should have a policy that community colleges should not serve as public libraries.
- Library systems should take more of a leadership role in library service.
- New initiatives are needed, such as county library systems (perhaps modeled on Ohio and Indiana) or statewide local financial support for public libraries, perhaps modeled on Iowa and Wisconsin. Another consideration should be new methods of funding to supplement or even replace property tax (Indiana is one model).

### **Summit Recommendations**

While the range of discussion over the two-day conference was exhaustive, the energy, dedication, and commitment to finding solutions were

not. As Susan Lucco, Director of the Lewis & Clark Library System, reported, "It was heartening to learn that the desire to pursue the goal of the universal public library is still strong in our statewide library community."

After the small group discussions concluded, the facilitators reported on the consensus recommendations from the discussion of the issues. Each recommendation was posted on flip chart paper throughout the large meeting room. Summit participants voted on their preferred recommendations. Votes were tallied and consensus was noted in a number of areas.

Top recommendations were as follows:

#### RECOMMENDATION #1:

**Develop a statewide universal service action plan and a plan for legislative action to mandate tax-supported public library service. Allow for local differences in implementation.**

This recommendation was supported by similar recommendations as follows:

- Prepare a strategic-long-range master plan for implementation of universal service.
- Mandate universal library service; decrease reliance on property tax; increase state contribution to public library service
- Plan for one statewide referendum vote for universal public library service. Since 94% of the population is already served, a "yes" vote in favor of library service is very likely.



RECOMMENDATION #2:

**Implement a statewide marketing program to support universal library service -- a joint state-local effort supported with grant funds geared towards all ages; not a special card for children.**

RECOMMENDATION #3:

**Reinstate the "System Development Officer" position at the library systems for a three-year period to work together to coordinate the statewide campaign.**

RECOMMENDATION #4:

**Undertake comprehensive research as background for addressing the unserved issue. Research should include a survey of other states; economic impact research focusing on case studies and focus groups comprised of unserved residents.**

RECOMMENDATION #5:

**Develop a statewide plan for exemplary multitype library service including investigation of new funding strategies, providing services to unserved as they become served, utilizing a coalition to address school library improvement and marketing the value and uniqueness of libraries.**

NOTE: This recommendation addresses library service in a multitype environment, not universal public library service.

RECOMMENDATION #6:

**Address funding issues related to public library service:**

- **Diversify tax sources with less reliance on property taxes.**
- **Change per capita grants to include land area and incentives for local contribution.**
- **Mandate with money.**
- **Establish a minimum threshold of funding to guarantee quality of service.**

RECOMMENDATION #7:

**Allow non-contiguous annexation by parcel or community through a change in public library legislation.**

RECOMMENDATION #8:

**Hold public hearings throughout the state; provide an opportunity to hear from the unserved, etc., so they can "tell their story."**

Other recommendations received less support partly attributed to the finite number of votes (five) allocated to each summit participant. Overlapping recommendations from different groups also played a role in the decision process. The recommendations with limited votes should not be discarded but should be reviewed as the next steps unfold. The recommendations receiving less support were:

- Consider elimination of non-resident service but give people advance notice to join districts. At the same time, promote the services of other types of libraries.
- Seek universal service -- look at what other states have done (see recommendation #1).



- Initiate statewide effort with a master plan for universal service -- marketing education campaign and political campaign (see recommendation #1).
- Work with real estate associations to require disclosure on whether or not public library service is provided for residential real estate property listings.
- Identify and serve all segments of the community.
- Let the library be the heart of the resurgence of community.
- Partner with groups such as the Illinois Municipal League.
- Use tax bill method for non-resident fees, which are local use only cards, until other solutions arise.
- Keep property tax as fundamental base.
- Define minimum criteria or standards for providing service.
- Mandate service with .15% tax levied on entire state; local library receives matching funds for its tax levy, change per capita formula and increase construction funding.
- Mandate service with library funding through a combination of local property tax (homesteads only; non-contiguous boundaries; sales/transaction local taxes and state revenue).
- Mandate service using a combination of tax on all property and state contribution.
- Implement universal service within five years.
- Mandate universal service, allowing for local differences.

### **Conclusions and Next Steps**

The Summit on the Unserved provided a clear consensus advocating tax-supported public library service in terms of the major recommendations. An action plan, however, needs to be developed. With 2001 as the target year for developing an implementation plan, the director of the State Library will appoint an implementation group to meet regularly and design an action plan by October 2001.

Members of the implementation group will be appointed from the members of the Illinois State Library Subcommittee on the Unserved and one summit participant from each discussion group.

## APPENDICES

### APPENDIX A. Summit Participants

- Karen Anderson, Decatur Public Library
- Dolores Bauman, Hudson Area Public Library District
- Sue Beach, Quincy Public Library
- John Berry, NILRC and President-Elect, American Library System, River Forest
- Nancy Buikema, Fulton Community Schools
- Alice Calabrese, Chicago Library System
- Sharon Campbell, Shawnee Library System, Carterville
- James Carelton, Jacksonville
- William Carrell, Metropolis
- Lynda Clemmons, Harrisburg
- Vickie Cook, Kaskaskia Community College, Centralia
- Maggie Crane, Woodstock Public Library
- Janie Dollinger, Lanark Public Library
- Anita Driver, Jerseyville Public Library
- Donna Dziedzic, Naperville Public Libraries
- Pam Feather, DuPage Library System, Geneva
- Cynthia Fuller, Decatur
- Judy Funderburg, New Holland
- Nancy Gillfillan, Dixon Public Library
- Richard Gooch, Heritage Trail Library System, Shorewood
- Caryl Harris, Matson Public Library, Princeton
- Nancy J. Heggem, Palatine Public Library, Palatine
- Sharon Highler, Sharon, Fountaindale Public Library District, Bolingbrook
- Deanne Holshouser, Edwardsville Public Library
- James Howard, Lincoln Land Community College, Springfield
- Anne Hughes, Glen Carbon Centennial Library
- Judy Hutchinson, River Bend Library System, Coal Valley
- Jan Ison, Lincoln Trail Libraries System, Champaign
- Theria Jackson, Centreville
- Jim Johnston, Joliet Public Library
- Jan Jones, Northern Illinois Library System, Rockford
- Terry Karsgaard, Jacksonville
- Gwenn Klingler, Illinois General Assembly, Springfield
- Pam Kramer, DuPage Library System, Geneva
- Phil Lenzini, Kavanagh, Scully, Sudow, White & Frederick, P.C., Peoria
- Carol Little, Auburn
- Sarah Long, North Suburban Library System, Wheeling
- Susan Lucco, Lewis & Clark Library System, Edwardsville
- Robert McKay, River Bend Library System, Coal Valley
- Walter V. McLaughlin, Jr., DuPage Library System, Geneva
- Jane Miller, Palos Park Public Library
- Lola Morris, Crab Orchard Public Library District, Marion
- Carl Parmenter, River Bend Library System, Sheffield
- Barbara Peterson, Centralia Regional Library District
- Veronda Pitchford, Chicago Library System
- Robert Plotzke, Rolling Prairie Library System, Decatur
- Mirriam Pollack, North Suburban Library System, Wheeling
- Jo Potter, Alpha Park Public Library District, Bartonville
- Tim Price, Illinois Farm Bureau, Bloomington
- Joyce Reid, Hayner Public Library District, Alton
- Jill Rodriguez, Bensenville Community Public Library District
- Charm Ruhnke, Lewis & Clark Library System, Edwardsville
- Katie Satorius, Minooka
- Fred Schlipf, Urbana Free Library
- Joe Sciacca, Lincoln Trail Libraries System, Champaign
- William S. Seiden, North Suburban Library System board, Deerfield
- Doris Shawler, West Union
- Nancy Smith, Northern Illinois Library System, Rockford
- Nicole Snoblin, Lake Bluff

- Sandy Soderquist, Heritage Trail Library System, Shorewood
- Rae Rupp Srch, Villa Park
- Amanda Standerfer, Rolling Prairie Library System, Decatur
- Marydale Stewart, Peru Public Library
- Karen Stott, Alliance Library System, Pekin
- Kay Summers, Rolling Prairie Library System board, Clinton
- Richard E. Thompson, Wilmette Public Library District
- Jim Ubel, Shawnee Library System, Carterville
- Glenna White, Newman
- Valerie Wilford, Alliance Library System, Pekin
- Denise Zielinski, President, Illinois Library Association, Lombard

#### **APPENDIX B. Public Hearing Summary and Participants**

Wayne Lovern, Chatham Area Public Library District trustee

Winifred Coningham Golden, Knapp/Chesnut/Becker Historical Society, Inc., Middletown

Richard Thompson, Director, Wilmette Public Library District

Robert McKay, Director, River Bend Library System, Coal Valley

Frances Fanning, Carbondale Public Library

Libby Dale, Carbondale Public Library

John Berry, NILRC Executive Director and President-Elect of the American Library Association

#### **APPENDIX C: Written Testimony**

Mr. George H. Scheetz  
Champaign Public Library

Jim and Sarah Milford  
e-mail  
Carbondale, IL

Beth M. Arthur  
Clinical Center  
Southern Illinois University

Clara D. Schroeder  
Central Citizen's Library District  
Clifton

Deborah C. Rugg, President  
League of Women Voters  
Of Champaign County

Louise H. Allen, Chair,  
Library Study Committee  
League of Women Voters of  
Champaign County

Wayne R. Lovern  
District Library Trustee  
The Performance Improvement Group  
Chatham

Gail Gush, Ph.D.  
Maine Township High School West  
Des Plaines

Nancy Doerge  
National Learning Systems, Inc.  
Marion

Cindy D. Crawford  
Rantoul

Duane and Linda Hileman  
Cobden

Marietta Kellum  
e-mail

Lilly Crane  
e-mail

Margaret Stromberg  
Marengo

Karen Watson  
DeKalb

Kristen Dean-Grossmann  
Urbana

Mrs. John Baran  
Northbrook

Irene Christiansen  
Glenview

Arleen Bower and Susan Bower  
Itasca

Ann B. Weston  
Northbrook

Betty Eutsler  
Volunteer Librarian  
Kinmundy

Mathew Kubiak  
Bloomington Public Library

Russell F. Coats  
Sterling

Susan Hoaglund, Trustee  
New Lenox Public Library District

Dennis G. Eksten, Board of Trustees  
North Suburban District Library  
Loves Park

Barbara J. Ficek, Secretary  
Oglesby Public Library District

Dolores Decaroli, Treasurer  
Oglesby Public Library District

Susan B. Williams  
Winnebago Co. Housing Authority  
Rockford

Russell Martin  
Savanna

Kim Shaw  
e-mail

Margaret Stromberg  
Marengo

Carbondale Public Library, four staff  
members

James K. Theisen  
Carbondale

Sheila Simon  
Southern Illinois University at Carbondale

#### **APPENDIX D: Public Library Service Funding in Other States**

[Report compiled by Tina Hubert, State Data Coordinator, Illinois State Library  
January 2001]

Most public libraries in the United States are primarily funded by "public funds." Determining where these public funds come from can be tricky. Overall, the majority of public libraries are funded directly or indirectly by taxes. Exactly what type of tax is used to fund public libraries is, in many cases, difficult to ascertain. However, property tax is the most utilized method of tax collection for public library funding. Public libraries that receive indirect tax funds often receive appropriations from a central funding source such as a municipality or county collection agency.

There is no standardized language between states as to types of libraries. The searching that took place to determine funding sources for public libraries was done with the terms "public libraries (or library)." For this report, focus was on municipal, city, town, or village libraries where language specific to such was found. When such language was not found, focus turned to township or county libraries.



When reading the table below, it is important to note that when the source of income is listed as property tax, it does not necessarily mean that those taxes are collected and distributed in a similar fashion as taxes are collected and distributed in Illinois. Many states also provide grants which would be considered similar to the per capita and equalization aid grants that are awarded in Illinois; these grants have not been outlined in this report.

The following information on population served was gathered from the American Library Directory 2000-2001 (population reported served ÷ state population reported), unless otherwise noted. The information on source of income came from each state's legislature as found via the Internet. Verification was requested of the State Data Coordinators through the SDC Listserv, February 8, 2001.

Alabama

Population served	Source of income
100%	Appropriation from county or municipal treasury

Alaska

Population served	Source of income
100%	No specific mention is made in Alaska Law for the provision of funding for public libraries.

Arizona

Population served	Source of income
100%	Property tax

Arkansas

Population served	Source of income
96.5%	Property tax

California

Population served	Source of income
98.4%	Property tax + special tax

Colorado

Population served	Source of income
100%	Property tax

Connecticut

Population served	Source of income
100%	Property tax

Delaware

Population served	Source of income
100%	Municipal property tax

Florida

Population served	Source of income
99.8%	Appropriation from county or municipal treasury

Georgia

Population served	Source of income
100%	Many sources including state government, local county governments, local city governments, local boards of education, federal grants, local endowments and foundations.

Hawaii

Population served	Source of income
100%	State treasury - libraries special fund

Idaho

Population served	Source of income
84.2%*	Property tax or allocation from city's general fund

\* from 1999 Idaho Public Library Statistics, Five Year Summary

Illinois

Population served	Source of income
92.7%	Property tax

Indiana

Population served	Source of income
92.7%*	Property tax

\* from Statistics of Indiana Public Libraries 1999, Indiana Summary Data

Iowa

Population served	Source of income
71.4%*	Property tax

\* Iowa Public Library Statistics, Pocket Digest for 1999

Kansas

Population served	Source of income
99.9%	Property tax

Kentucky

Population served	Source of income
99.0%	Property tax

Louisiana

Population served	Source of income
100%	Property tax

Maine

Population served	Source of income
84.0%*	May levy and assess a tax

\* noted as "by public libraries reporting"

Maryland

Population served	Source of income
100%	County assesses property tax and appropriates funds; State provides approximately 40% of the total cost of the minimum program

Massachusetts

Population served	Source of income
99.9%	Municipal appropriation

Michigan

Population served	Source of income
99.9%	Voted millage, appropriation of property tax from municipality and penal fines

Minnesota

Population served	Source of income
100%	State sales and income taxes, property tax and, in some cases, local sales tax

Mississippi

Population served	Source of income
100%	Local sources such as ad valorem, and/or special tax, which can include property tax; the funding comes from local general funds

Missouri

Population served	Source of income
86.6%	Property tax

Montana

Population served	Source of income
100%	Property tax

Nebraska

Population served	Source of income
88.6%	Property tax

Nevada

Population served	Source of income
100%	Mix of property and other taxes

New Hampshire

Population served	Source of income
99.2%	Municipalities annually raise and appropriate a sum of money sufficient to provide and maintain adequate service

New Jersey

Population served	Source of income
99.2%*	Property tax by appropriation or levy

\* added reported population served to reported population unserved for population total; divided population served by population total

New Mexico

Population served	Source of income
83.6%	Municipal/Local government appropriations

New York

Population served	Source of income
92.7%*	Levy a tax - unknown what kind



North Carolina

Population served	Source of income
100%	Any non-tax revenues from governing body

North Dakota

Population served	Source of income
88.5%	Library fund consisting of annually collected taxes

Ohio

Population served	Source of income
100%	Local Library and Government Support Fund derived from income tax, may also levy local level property tax

Oklahoma

Population served	Source of income
82.7%	Special levies of any and all taxes are levied by counties, cities and towns, State Treasury revolving fund for Oklahoma Local Library Support Fund

Oregon

Population served	Source of income
95.0%	Local government property tax

Pennsylvania

Population served	Source of income
97.8%	Property tax

Rhode Island

Population served	Source of income
100%	Municipal appropriation

South Carolina

Population served	Source of income
100%	Tax levied by governmental unit

South Dakota

Population served	Source of income
71.0%	Public funds from governing body

Tennessee

Population served	Source of income
103.0%*	Property tax

\* reported more population served than state population

Texas

Population served	Source of income
93.2%	Sales and use taxes - financed and operated by municipality

Utah

Population served	Source of income
100%	Property tax or Governing Body's General Fund

Vermont

Population served	Source of income
96.8%	Municipal appropriation

Virginia

Population served	Source of income
99.9%*	Special levy or a fund of the general levy of the city, county or town

\* added reported population served to reported population unserved for population total; divided population served by population total

Washington

Population served	Source of income
96.6%	Property tax

West Virginia

Population served	Source of income
100%	Appropriation from general funds of governing authority OR excess levy

Wisconsin

Population served	Source of income
100%	Tax collected by municipalities and counties, then appropriated to libraries

Wyoming

Population served	Source of income
100%	Property tax

**To summarize:**

- 23 states serve 100% of their population.
- 18 states serve between 90% - 99% of their population, including Illinois.
- 7 states serve between 80% - 89% of their population.
- 2 states serve between 70% - 79% of their population.

29 states make specific reference to property taxes as a source of funding for public libraries.







## Illinois Library System Directors' Organization

Shirley May Byrnes, President   Jan Beck Ison, Vice President   Joe Harris, Secretary/Treasurer

### A Brief History of Efforts Concerning the Unserved Residents of Illinois

For decades, the majority of Illinois residents have enjoyed quality library services. In Illinois, library service is locally supported by a specific property tax for public libraries and public library districts. This tax is paid by residents of municipalities, townships, counties and library districts who have chosen to establish and support public library service.

However, not every citizen of Illinois has access to public library services. Fewer than one million residents of the state are not served by a public library because they reside outside of library taxing boundaries. These residents are known in the library profession as non-residents or the unserved/untaxed. Some of these non-residents have expressed a desire for library service by purchasing a non-resident library card. Other non-residents have chosen not to participate in library service and have voted against inclusion in a public library. Many non-residents, especially families with grade school aged children, feel they have a legal right to full library access without providing any monetary support. However, the Illinois Compiled Statutes are clear on this subject. If an individual residing outside the library's service area wishes full access, the individual is charged an amount at least equal to the cost paid by library residents. (See 75 ILCS 5/4-7(12) or 75 ILCS 16/30-55.60)

*what is current #?*

A cautionary word concerning the number of non-residents. While the reported number of non-residents seems stagnate, hovering around one million, the number of non-residents has actually decreased over the past 50 years. When taken in conjunction with the State's population increase, the ratio of non-residents is a better reflection of the work done to bring library service to the whole state. For example, the State's population in 1960 was 10,081,158 with an unserved population of 2,109,554; in 1980 the population was 11,426,518 and the unserved was 1,810,359; and in 1990 the population was 11,430,602 with an unserved number of 1,707,531.

The Illinois State Library and Illinois Library Systems have worked to reduce the number of non-residents through out the state. During the late 1970's, Systems hired Library Development Consultants specifically to bring library service to unserved areas. Today, each System continues to have a staff member assigned to work with the unserved. The State Library has awarded grants to Systems and local library districts with focus of establishing public library service in unserved areas.

*how?*

A variety of reports have been commissioned to study and resolve the non-resident issue. In 1963, the Library Development Committee of the Illinois Library Association published *A Plan for Public Library Development in Illinois* (Robert H. Rohfl, project director). This document is

considered the conception of Illinois Library Systems. Interestingly, the study's discussion of citizens living outside a public library service (non-residents) is nearly word for word the non-resident discussions in 2005. "... (Non-residents) feel that it is their right to use the library services free regardless of whether or not they actually are residents within the library tax area..." (Page 11) At that time, the non-residents/unserved was estimated at 2,109,554 of the population.

During the 1970's and 1980's, the Illinois State Library used portions of its LSA/LSCA monies to fund Project PLUS and Project LIME programs. Project PLUS grants were awarded to 1) libraries wishing to annex unserved areas to an existing public library districts or 2) Systems working with unserved communities hoping to establish public library districts. Project LIME grants were awarded to libraries considering voter-approved mergers into larger service areas. After Projects PLUS and LIME were discontinued, Demonstration Grants were developed for use by Systems and/or local library districts.

*Vision 1996: a plan for the Illinois Library Systems in the next decade* (also known as the HBW Report, 1986) dedicated a chapter to the untaxed/unserved situation by incorporating *Access to Information in Unserved Rural Areas*, by the Illinois Library Committee (1986) into the longer report. The HBW Report, while discussing several alternatives to bring service to the unserved, does say, "Perhaps most persons who live outside the jurisdiction of a public library are content with their choice, and any major campaign to reduce their number would be money not wisely spent." *Access to Information in Unserved Rural Areas* published in the October 1986 *Illinois Libraries*, states that 1,810,359 of the Illinois population is unserved by public libraries in 1984.

An example of System-based activities towards the reduction of the unserved is the Lincoln Trail Libraries System project. In 1990, they developed the County-wide Rural District: a cooperative approach to providing library service to citizens in unserved areas. The concept was to concentrate extensively on bringing full public library service to one county. The unserved areas would form one public library district, contracting for service with the existing public libraries/districts within the county.

In 1989, the Secretary of State empanelled the Illinois State Library Task Force on Rural Library Services. The task force recommendations deal with providing adequate library services to rural areas in Illinois. At the time, an estimated 1,707,531 citizens did not have tax-supported public library service or about 3.3% of the 1989 state population. One task force option was mandated tax-supported libraries through out the state.


The Rural Library Panel, appointed by the Secretary of State in 1992, strongly recommended that all Illinois citizens have tax-supported public library service in their *Strengthening Library Services in Rural Illinois*. By the 1992 Panel, an estimated 1.4 citizens did not have tax-supported public library service. The full report was published in *Illinois Libraries*, January 1993 issue.

In 1994 the General Assembly Task Force on Library Finance held a series of hearings concerning library funding. While not specific to the unserved situation, this task force did touch



on the issue during its discussions of property taxes as nearly the sole support of Illinois public libraries. The Final Report was printed in the Spring 1996 issue of *Illinois Libraries*.

Regional Planning Panels were established in 1995 under Illinois Law to study the unserved situation. The Illinois Library Systems each had 1 or more panels, each panel developing solutions for their specific unserved issues during 1996 and 1997. In 1998 the panels' reports were reviewed and summarized. The most common recommendations from the Regional Planning Panels were 1) mandate tax supported public library service and 2) find alternate sources of tax revenues for public libraries reducing the dependence upon property tax.

 *Public Library Service for All: a report from the Summit on the Unserved* (October 2000) summarized the two-day summit. Participants were asked to consider 7 issues relating to the unserved situation.

1. What are the overriding principles that needed to be addressed regarding solutions to the unserved?
2. Are non-resident cards workable in the 21<sup>st</sup> century?
3. Should we look at different solutions for different areas of the State or is a one size fits all solution a rational goal?
4. What are the biggest barriers to statewide public library service?
5. Should statewide library services for children be the first priority?
6. What can we do to encourage legislators, citizens in general, the unserved and the underserved to be more interested in public library service?
7. Based on the overview of the regional planning panel reports, prioritize your group's top five solutions for addressing the unserved issue.

The Illinois State Library released *Universal Library Service by 2010* in February 2002. This was a plan based on the Unserved Implementers' Group recommendation from the October 2000 Summit on the Unserved. A two-step plan, the document recommended county-wide library service with a voter approved library tax levy on unserved areas within the county. In 2010 (or sooner) legislation would be proposed to require the remaining county boards to levy a tax on its unserved residents.

A common theme of the unserved/non-resident reports over the past 40 years is mandated library service. However, this option has not been palatable to the legislators. They, along with many in the library and other fields, feel that the non-residents have chosen to live outside library services areas. Those non-residents wishing for library services are eligible to purchase a library card or to band together to form/join a library service area. Interestingly, with about a million non-residents in Illinois, less than a 100,000 have chosen to purchase library cards. Some individuals choose not to purchase a non-resident card as they feel the fee, as determined by the State Library's formula, is too high. Even though the amount is comparable with what local residents are paying in tax support for the library, the majority of non-residents choose not to purchase the card. The relatively low number of non-resident cards purchased is a major factor why the legislators are not interested in mandating library service.

Compiled by Charm Ruhnke, Lewis and Clark Library System, and Amanda McKay, Lincoln Trail Libraries System.