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## EDITORIAL

Webster defines budgeting as a plan or schedule adjusting expenses during a certain period to the estimated or fixed income for that period. For the past eight years, Indiana public libraries have existed with fixed incomes. Despite the lobbying efforts of the American Library Association and ILA/ILTA this situation will probably remain the same for the next few years. There won't be a change in federal or state attitudes toward the funding problems of public libraries until the taxpayer's revolt is replaced by a users' revolt.

What can public libraries do in the meantime? Make sure that we utilize our resources, both human and fiscal, to the best of our ability. We must examine some of the traditional library services and policies as to their cost effectiveness. It may not be good fiscal policy to send a bookmobile on a thirty mile round-trip just so that we can say a certain rural township is receiving library service. Maybe we can no longer justify buying books that don't circulate for the sake of a balanced collection. Maybe public libraries can no longer afford to continue buying 16mm films to support public school "curriculums." Maybe service would not be too diluted if we started replacing some of the professional librarians with para-professionals.

Next, libraries could consider charging fees for certain services to generate additional income. Patrons may be willing to pay \$1.00 to place a reserve or get an interlibrary loan for a book the library

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could not afford to buy. They may not even object to paying \$1.00 per child for a story hour. Daily fines on overdue materials could be doubled for additional income.

When fees and service reach a certain level, maybe then we would have a user revolt. Maybe we would have politicians saying, "We have a mandate to bring back "free" public libraries and restore the level of service to what it was in 1980."

Of course, all this could be avoided if the current legislature would provide public libraries and other units of local government, with an alternative means of funding. For example, a local option income tax, without a property tax relief fund, taxing business as well as individuals, would go a long way towards solving public library funding problems for years to come. It would also restore local control over local government.

Indiana libraries receive approximately 82% of their funding from the unpopular, insensitive to economic conditions, and discriminatory property tax. A local option income tax, described above, would not replace property tax, but it would supplement and relieve the burden currently supported by property tax and thus provide a means for additional income for Indiana libraries.

The following articles fit well into this issue's theme. Robert Logsdon and Laura Johnson lead off with a sound article presenting the historical aspects of Indiana's tax funds for libraries. Stella Bentley's article is an excellent example of the technical decisions which must be made in the budgeting and planning process. And finally, Art Meyer gives us an alternative to funding which many librarians have never viewed before. All help us understand the library budgeting process and problems within Indiana.

Robert Trinkle Guest Editor

## Indiana Public Library Funding and the Tax Control Program: A Retrospective

Robert Logsdon Laura Johnson

Indiana in the early 1970's found itself faced with one of the same problems its sister states was facing, increasingly higher property taxes. Concerned with the possibility of even higher rates and well aware of the political repercussions that could arise if something wasn't done, the Indiana General Assembly in 1973, with the approval of the administration of Governor Otis R. Bowen, passed into law several new bills that were to have substantial effect upon local units of government and which dramatically halted the rise in property taxes paid by Indiana citizens.

The program called the 1973 Tax Package was designed to provide "substantial, visible and lasting property tax relief." To accomplish this, the state sales tax rate was doubled from two to four percent, a supplemental tax on corporate net income was

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imposed and strict controls on school and civic property tax levies were implemented. The revenue raised from the increased sales tax and the corporate supplemental tax was placed into a Property Tax Relief Fund (PTRF), and from this distributed to the counties of the state twice a year.<sup>1</sup>

Local units of government were affected because one, their property taxing authority had new limits placed upon it, and two, the availability of a new revenue source was created through the adoption of a local option income tax subject to the approval of the county council.

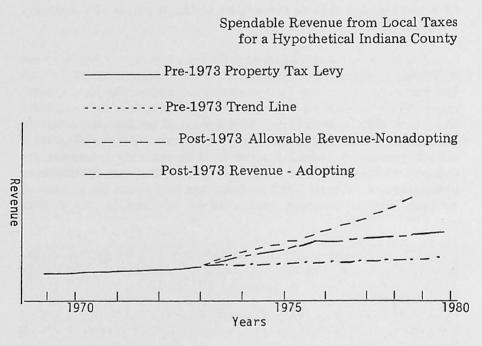
These two provisions placed different property tax limits on the individual counties depending upon whether the local option income tax was adopted or not. In nonadopting counties, the local governments were "limited each year to levying a property tax no greater than their 1973 property tax levy increased by the percentage of increase in the taxable assessed valuation since 1973. Local units in adopting counties [were] limited in their property tax levies, for years in which the county receive[d] local option tax distributions, to the amount of their 1973 property tax levy minus the amount of property tax replacement credits to be received by the government."<sup>2</sup>\*

Public libraries in Indiana immediately felt the impact of this new legislation, as did all local units of government. The Public Library Law of 1947, as amended (IC 20-13-1), provides public libraries with the authority of an independent governmental unit to levy a property tax and to issue bonds; thus, the public libraries were affected by the new property tax restrictions and guidelines. Those in non-adopting counties found their tax rates "frozen" at the 1973 level, while those in adopting counties "had to freeze their property tax levies in order to receive the local income tax revenue."3 At this time, increases in the cost of library materials were averaging 16%-18% as compared to 1973 levels, due to the highly inflationary increases in paper, binding, and shipping experienced during this period. Given the escalating fixed costs for utilities and fuels, personnel benefits and the like, libraries were indeed 'squeezed' between rising operating costs and a ceiling on revenues. No matter which system was used by the county, public libraries and other units were forced to subsist on less money than had the tax package not been adopted. This is clearly demonstrated in Figure 1, which while applyto all units of local government, clearly relates to public libraries as well.

<sup>\*</sup>Definition of terms can be found at end of article.

As can be evidenced by the projections in the accompanying chart (Figure 1), the amount of revenue that would have been received had the 1973 tax package not been adopted would have been substantially higher than was realized with the "freeze" in effect.





Source: Kiefer, Donald W. "The Indiana Tax Package After Three Years" Indiana Business Review 51; Sept./Oct., 1976, 6.

From the beginning librarians and trustees had been aware of the implications of these tax measures but had insufficient clout (as had all the other local units of government) to prevent its passage. As the chairperson of the joint Indiana Library Association - Indiana Trustee Association (ILA-ILTA) Legislative Committee later commented "...all the committee could do was watch to see that public libraries were not affected differently from other local governmental units. This required much effort even after the end of the session."<sup>4</sup>

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In 1973, the same year the Tax Package was enacted, public library districts in Indiana were determined by federal and state

officials to be ineligible for participating in the federal revenue sharing program (State and Local Assistance Act of 1972) which was to become a source of additional revenue for cities, townships and counties. Acting with good intention to provide access to revenue sharing funds through other units, the legislature enacted P. L. 101, (Acts of 1974) to enable "a government which receives revenue sharing funds to give all or a portion of the revenue to a library taxing district." This, however, was to meet with disappointment as it was later ruled by the State Board of Tax Commissioners and the Attorney General that this did not constitute a statutory provision for these units to appropriate their own revenues to libraries, except in the instances of townships having contractual agreements with libraries for the provision of services. Since the property tax was the primary source of income for most public libraries, and an alternative source, revenue sharing funds, was not available, legislative efforts to achieve state funding assistance was renewed. Proposals for state aid had been initiated in the past, but now this effort was substantially increased. One remedy proposed in 1974 was for per capita funding for public libraries with each library district to receive \$.50 per capita; however, this measure failed to pass the General Assembly.6

Hoosier librarians and trustees continued with their efforts to persuade the Indiana General Assembly of their need for some aid. Legislative proposals by the ILA-ILTA Joint legislative committee for the years 1974, 1975, and 1976 clearly reflect this effort. A "Current Assessment" survey of Indiana Libraries dated January 6, 1976 was used by the legislative committee to document experiences of Hoosier libraries in 1974-1975 with projections for 1976. Among the findings were that while there was tremendous increase in use by the general public, many libraries were being forced to cut their hours of operation either by closing evenings or on weekends. branches were shut down and bookmobile services were being curtailed. None of the libraries surveyed had been able to increase services and many had cut back in materials budgets and in repair and maintenance expenditures. While the study did not claim to represent all of the public libraries in the state, it did demonstrate the problems and concerns that were being experienced.<sup>7</sup> The plea for assistance was based upon the need for some relief from the frozen tax levy provisions, and appropriateness of correcting the inequity of the exclusion of public libraries from federal and state revenue sharing distributions.

Finally, the legislative efforts of the library community were rewarded with the appropriation in 1976 of \$800,000 to be distributed among the public libraries. Although less than the \$2 million

requested, it was a major breakthrough toward the goal of achieving recognition of a state responsibility to assist public libraries financially.

Distribution of the state funds was determined by the State Board of Tax Commissioners as follows: The amount distributed to each library was equal to "the produce of \$800,000, multiplied by a fraction - the numerator of which (was) the dollar amount of the library's 1976 budget, and the denominator (was) the total dollar amount of the 1976 budgets of all the public libraries in the state:

\$ amount of individual library's 1976 budget \$800,000 X total \$ amount of 1976 budgets of all public libraries''8

The amounts distributed ranged from a low of \$64.68 to the York Township Library in Raub, Indiana to a high of \$121,142.80 to the Indianapolis-Marion County Public Library. In 1977, Public Law 43 amended the law governing the Indiana Library and Historical Board (IC 4-23-1) to define an eligible public library and to revise the denominator to equal the total budgets of all eligible public libraries.

The Bowen administration, The General Assembly leadership, property owners and the general public remained supportive of the property tax control program, for by 1976 the average property tax rate was \$7.48 per \$100 assessed valuation, representing a 32% reduction from the projected \$11.00 level based on pre-1973 trends. The optional income tax at the local level was less popular, for only 38 of the 92 counties had adopted the income tax.

It was becoming apparent, however, that changes were going to be needed in the 1973 program because of forthcoming reassessment of real property. If the legislature didn't make some revisions, "those units in non-adopting counties potentially would be able to increase their property tax receipts by the same percentage as the increase in assessed value. In some areas that increase could be as much as 100%. Units in non-adopting counties would thus be allowed to double their expenditures without increasing tax rates. Governments in non-adopting counties would, on the other hand, have to reduce the tax rate by one-half to live within the 1973 levy limitations. A general reevaluation of property would allow nonadopting counties to have more property tax revenues to spend, while adopting counties would function with the same amount of property tax revenues as before the reevaluation." 10

After a great deal of deliberation, a second generation property tax package was adopted in a special session of the 1977 legislature. Basically, the provisions of the 1973 program which had imposed frozen rates and levies were changed and the 1978 levy was established as the new base levy. Previously a different formula was used for governmental units in adopting and non-adopting counties. With the new provisions however, the same formula would be used regardless of whether a county had adopted the local option income tax or not. "Under the old controls, the 1978 property tax in an adopting county would have been equal to the 1973 property tax levy minus the portion of the local option income tax returned as property tax relief (PTR) credits. The remainder of the local option income tax revenues constituted certified shares. In nonadopting counties, the 1978 property tax levy would have been equal to the 1973 property tax levy multiplied by the percentage increase in assessed value from 1973 to 1978." 11

The new formula adopted, for both adopting and non-adopting counties, was to add the 1977 property tax levy and the 1977 certified shares, if any, and multiply by the greater of 1.05 or the percentage increase in assessed value from the 1976 to the 1977 tax year. From this was subtracted the 1978 certified share. The 1978 property tax levy resulted. Table 1 better illustrates this computation.

TABLE 1: 1978 levy =

(1977 levy + 1977 certified shares) X 1.05 or (1977 assessed valuation/1976 assessed valuation) - 1978 certified shares

Adopting levy =

1973 levy or (preceding year's levy + certified shares) X 1.05 - ensuing year's certified shares.

Non-adopting levy =

1973 levy X (ensuing year assessed value/1973 assessed value) or (preceding year's levy + certified shares, if any) X 1.05

Source: Lloyd, Scott S. "The New Local Property Tax Controls" *Indiana Business Review* 53, January/February, 1978, 3.

Both adopting and non-adopting counties were guaranteed at least a 5% potential revenue increase for 1978 and, with minor adjustment, 8% for  $1979.^{12}$ 

While this helped some, most libraries, and other units found that inflation and rising utility costs far exceeded any increase they could get from this change. Therefore, continued efforts were maintained by the library community to increase state aid. The 1977-1978 budget included a 4% increase of \$32,000, but for the second year of the biennium, the 1977-1978 distribution was funded for the same amount. Librarians felt that since most other agencies had received at least a 4% increase for the second year of the biennium, libraries should have faired as well; the proposal urged that in order to obtain adequate funding, 4% of public library income, \$1,411,500, was needed. 13 Also proposed was that the \$.45 maximum tax rate imposed upon public libraries in the Public Library Law (IC 20-13-6) be removed. This was needed because some library units were near the maximum rate and without revision or removal of this ceiling, they would have been ineligible to receive the 5% increase that had been allowed in the second generation tax controls "due to the fact that assessed valuations (had not) increased sufficiently for the maximum tax rate to generate a 5% increase in levy." 4 While the proposed increase in state funding was not approved, the maximum tax ceiling was raised from \$.45 to \$.55 in the 1978 session of the General Assembly, providing some leeway for a few libraries. Meanwhile, efforts continued toward gaining access to revenue sharing funds through other units. In 1977, Public Law 199 was passed to allow a township to appropriate its funds, including general revenue sharing funds, for community services, including library services.

In 1978, a similar measure was approved, to "allow a county, city or town to appropriate funds, including its general revenue sharing funds, to a public library. The library [could] receive funds for operating and capital expenditures if it serve[d] all or part of the geographic territory within the borders of [those] units of local government." <sup>15</sup>

Indiana was not the only state concerned with property taxes in 1978. California adopted the controversial Proposition 13 and twelve other states had some form of tax limitation proposals on their ballots in the fall elections of that year. <sup>16</sup> However, Indiana did not feel it was necessary to go to the drastic measures of some of these other states, and instead noted with pride that property tax reductions had been achieved with the passage of its 1973 tax package. It was obvious that the prevailing mood of the state and nation was to maintain control on this method of achieving government revenue.

Indiana legislators could not entirely rely on their past laurels; however, the second generation tax package mentioned earlier had provided for 5% tax increases in 1978 and 8% in 1979, but none for 1980. Therefore, it was necessary for the 1979 General Assembly to

come up with some adjustments in order for local units to have a buffer against the high inflation economy and not revert back to the frozen rate or levy system of the first generation tax controls.

"Instead of dictating a flat percentage [as they had in the previous package] . . . the legislature allowed units to use a three year average in their growth of assessed value as their tax-levy growth rate. In addition, for slow-growing units, the legislature guaranteed that if the unit's growth rate was below the average statewide assessed value growth rate, the statewide figure of 4.56% could be used instead. On the other hand, fast-growing units could not increase their levies by more than twice the statewide average, or 9.12%."

Another feature of the third generation tax package was the added attraction of allowing tax revenues generated by the local option income tax that were in excess of the 1979 receipts to be kept by the adopting county. Also included was a proposal known as the Homestead Credit which allowed for a 10% property tax relief credit, in addition to the existing 20% tax credit, for each owner occupying a home. This credit was to be reduced by 2% each year until 1985 when it would discontinue.<sup>17</sup>

Through these three generations of tax controls, Indiana has managed to provide property owners with substantial and visible property tax relief as was originally intended. However, recent concern has developed about how long the Property Tax Replacement Fund (PTRF) will remain solvent. It is predicted, that unless something is done, the fund will be insufficient by mid-1983 to cover its projected expenditures. Several factors have contributed to this situation. While the PTRF revenue climbed about 9.4% a year property tax payments from the fund increased by about 21%, and funds distributed to local schools rose about 39% annually. Also, additional PTRF monies have been provided to local units, particularly to schools to offset the property tax revenue lost by the homestead exemption credit provided in 1979. Legislators are discussing several remedies for this situation, including a reduced subsidy of school funding, but at the present time, the only thing that is certain is that revisions are necessary to avoid a deficit. 18

As has been long realized, the dependence of local units of government upon the property tax for their revenues has created undue hardship upon them when remedies are initiated to limit or halt the growth of this tax. While various solutions to this problem have been initiated from Proposition 13 in California to the property tax controls of Indiana, many governmental units are still almost entirely dependent upon this source of income. Public libraries in Indiana are in a similar situation, for while they have been able to acquire a small amount of state aid, and to a limited extent revenue

sharing funds, and alternative revenues such as the PTRF and optional income tax have acted to offset some of the burden, their primary support still comes from the property tax. Political realities indicate that legislators are not going to allow the property tax rates to increase substantially; therefore, libraries and other units of local government must investigate alternative sources of revenue.

To analyze the current system of public library funding in Indiana, including the effects of the tax control program, the Indiana State Library has awarded a contract to the University City Science Center, in collaboration with the Center for Information Research, School of Library and Information Science, Drexel University, to document the funding of public library services in Indiana, investigate and evaluate alternative systems, and recommend improvements. The study, to be completed in April, 1982, should provide useful information in preparing for future legislative proposals. While the future remains uncertain, Indiana's libraries are striving to meet the challenges of these times of economic decline in a responsible manner and will continue to work toward building a solid funding base for public library services.

#### \*Definitions:

- 1. Tax rate: Amount taxed or assessed per \$100 of assessed valuation.
- 2. Tax levy: Amount to be raised by tax rate.
- 3. Certified shares: Income received by tax units in counties which have adopted the local option tax. (County adjusted gross income tax)
- 4. Property tax replacement credit: Income received for replacement of property tax by taxing units in counties which have adopted the local option tax.

Source: Extension Division Bulletin (Indiana State Library). 27: June, 1977, 10.

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## Managerial Decision Making and the Budgetary Process

Stella Bentley

The budgetary process is an important undertaking in any organization, and one which demands much time and effort of the organization's administrators. The main task of the administrators of any organization is to manage the organization so that the goals and objectives of the organization are met. The administrators must create, plan, organize, motivate, communicate, and control in order to accomplish this task. The budgetary process requires that important decisions be made so that the allocation of resources within the organization is in keeping with the goals of the organization, and enables the accomplishment of its objectives effectively and efficiently.

Prentice, in her *LJ Special Report* on library financial management, points out the managerial problem facing library administrators today:

Limitations on funds force library planners to set priorities. All desirable services cannot be provided and some must be sacrificed. How can library planners utilize existing resources

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so that maximum benefit can be realized from each dollar? What are the library's objectives and have they changed during the past two decades? Will funding limitations change those objectives? How can the library manager go about planning for services in a constricted-budget environment? What methodologies for planning and what types of information are necessary for making the best possible choices?<sup>1</sup>

The need for well articulated goals and objectives and priority setting within the goals and objectives cannot be overstated. Administrators need to consider the organization's goals and goal priority in order to make decisions which will lead to accomplishing the objectives. Allocation of funds within the library should reflect the goals and objectives of the parent organization and of the library. The goals and objectives must be clearly stated and widely discussed during and after their formulation. All who work in the library as well as all appropriate administrators, boards, or others who oversee or advise the library administration must be involved in the library's goal setting process, in the establishing of priorities, and in the frequent reassessment of the goals and priorities. Since most library administrators must present budget requests to the larger organization of which the library is a part-central administration, municipal, county, or state government, college or university administrationthe library administrator must know and understand the goals of the larger organization and how and why the library is essential to accomplishing those goals. The library's goals must not only be compatible with the goals of the parent organization, but should also serve to enable the parent organization to achieve some of its goals. The library administrator should use these goals and objectives statements, as well as evidence that they are being effectively and efficiently pursued, to make the best possible case for the library receiving an appropriate share of available funding.

Other decision making techniques should be part of the budgetary process in addition to well stated goals and objectives. Linear programming, goal programming, queuing, network models, and other quantitative techniques have many applications in libraries. These techniques, from operations research or management science, allow one to analyze and solve many managerial decision problems which are encoutered in libraries. Unfortunately, though, while the usefulness of these techniques have been successfully used to analyze and solve relevant problems in libraries, very few librarians have used the results of such studies or implemented these techniques to solve other problems. Several people have commented on this lack of implementation of quantitative managerial techniques in library management and sought to explain the reasons. Bommer thinks that

the main reasons are the use of too complex models—the degree of model sophistication exceeds the technical capability of the organization and crucial variables are often assumed away or ignored—and the failure on the part of operations researchers to emphasize implementation.2 Bookstein and Kocher believe that the causes are the difficulty of the subject (it requires a background not generally found in librarians), the interest of many operations researchers in solving a problem rather than in applications, and the inablility of library managers to take advantage of the availability of personnel specializing in quantitative management techniques due to budgetary constraints.3 As Bookstein and Kocher point out, however, operations research techniques can lead to more effective library management through their approach to problem solving.4 With limited budgets and increasing demands for materials and services. librarians must take advantage of techniques which will enable them to allocate their resources and manage their libraries more effectively and efficiently. The gap between theory and real world applications must be bridged so that the potential benefits of these techniques can be realized.

A few examples of specific quantitative techniques, library applications, and their effect on the budgetary process are presented to demonstrate how these quantitative techniques are important to budgeting decisions.

Queuing Models. The formation of writing lines is a common phenomenon which occurs whenever current demand for service exceeds the current capacity to provide that service. The ultimate goal of a decision maker who applies queuing theory is to achieve an economic balance between the cost of service and the cost associated with waiting for that service. The decision maker uses queuing theory to minimize total cost of service and waiting time by manipulating the controllable variables such as number of servers, speed of service, and order of service. Queues form in the course of most library operations—at the public catalog, at the reference desk, at elevators, at photocopy machines, at the circulation desk, in the cataloger's work area, in the reshelving area. By using queuing models, library administrators can determine the optimal staffing of service points, the number of shelvers, or the appropriate amount of various types of equipment to provide as more technology is applied to library operations. Each of these had budgetary implications. If, for example, the optimal staffing of service points is not possible, one can use the queuing model to examine the outcome of other staffing solutions and determine the average waiting period that will result from each possibility. With such information, a decision can be made with the knowledge that most feasible options have been considered.

Linear Programming. Allocation of limited resources among various competing activities is a continual managerial task. The goal of a decision maker who applies linear programming is to allocate the resources so that a measurable goal is optimized, and any constraints are satisfied. Linear programming computer programs are widely available, too, so that the application of this technique is now relatively easy. An important library application with budgetary implications is the allocation of personnel within technical services or public services departments (number of professionals, support staff, and student or other hourly employees). As more technology is applied to library operations, the types of responsibilities and tasks to be performed in libraries and the level of skill and amount of time needed to perform them have been changing. Linear programming can be used to optimize the allocation of appropriate personnel to the various required responsibilities and tasks.

Goal Programming. Goal programming is similar to linear programming, except that instead of attempting to optimize a single objective, one attempts to satisfy as many competing goals as possible after they have been prioritized by importance. Goal programming is particularly well suited to decisions in the public sector since there are often conflicting objectives, trade-offs, and the necessity to satisfy rather than optimize.<sup>5</sup> The goal of a decision maker who uses goal programming is to reach a solution involving multiple, conflicting goals which minimizes deviations from the goals so that low order goals are considered only after higher order goals. An important library application for goal programming is allocation of the materials budget. There are many competing goals, and a resource which is usually inadequate to satisfy all of the goals. By applying goal programming to this problem, one is forced to prioritize the goals which have been identified. This process of prioritizing goals can in itself be very useful to decision makers, since they must make clear their assumptions and develop acceptable reasons for the rankings. As with the other techniques, alternatives can be examined to see what different results are obtained if the rankings of the goals are changed or if different goals are considered.

Network Models. PERT (program evaluation review technique) and CPM (critical path method) are models which are useful for planning and controlling projects, especially those which are one-time-only or infrequent and consist of interrelated activities and subtasks. The goal of a decision maker who uses PERT/CPM is to plan, monitor, and reorganize resources so that objectives can be attained efficiently and on schedule. Using network models enables one to

determine which activities are critical and must be completed on time to keep the project on schedule, the flexibility available for noncritical activities, the earliest expected completion time for the project and the best way to handle delays. An important library application which librarians should consider is modeling the application of technology to library operations. Using network models is especially important if one is considering computerizing circulation, acquisitions, or installing a fully integrated system. The whole process, from needs assessment, specification writing, requests for proposals, analysis of bids, signing the contract, site preparation, conversion of records, installation and training, to final operating procedures, should be included in the model. Such detailed planning will enhance communication, provide efficient monitoring of the process, identify potential problem areas for the development of contingency plans, enable the proper use of resources, and enable control and rescheduling of the plan as necessary. Computer programs for network models are readily available, too, for easy application.

Management is a continuous process of making decisions. As Turban and Meredith have pointed out, quantitative techniques can enhance the decision making process in the following ways:

- (1) They provide a systematic and logical approach to decision making.
- (2) They permit a thorough analysis of a large number of alternative options.
- (3) They enable evaluation of situations involving uncertainty.
- (4) They allow the decision maker to judge how much information to gather in a given problem.
- (5) They increase the effectiveness of the decision.
- (6) They enable quick identification of the best available solution.
- (7) They allow examination of a large number of alternatives.6

The budgetary process, as part of the decision making process, is also made more rational by the use of quantitative techniques. Because the use of quantitative techniques requires disciplined thinking about a problem, the assumptions, costs, and goals which are factors must be articulated. Comparative analysis can then be made of different strategies, so that the incremental costs and benefits of the alternatives can be determined. The library administrator can then determine the best choice among the feasible alternatives which will take the library toward its goals and objectives in an efficient manner.

Incorporating quantitative techniques into managerial decision making requires time, effort, and expense. Planning may be required to determine what information must be obtained, how to obtain it, and how best to evaluate it, before alternative choices can be fully considered using quantitative techniques. The necessary information may not be readily available, and decisions will have to be made between the cost of acquiring needed information versus the cost of making decisions without that information. The library administrator, like any manager, will have to decide what to investigate using these techniques, how to investigate it, and how to interpret the results of the investigation. The potential benefits of using such techniques, however, especially if they result in more efficient and effective allocation and use of the library's budget so that it can reach its objectives, are worth the time, effort, and expense required.

#### Notes

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# The Property Tax, Personnel Costs and Politics: Gaining Community Development Block Grant Funds for the Public Library

Art Meyers

If the administrator of a governmental entity in Indiana wished to use poetic alliteration, the state-mandated property tax freeze instituted in the mid-1970's, joined to personnel costs and politics, would be a fine starting place. Unfortunately, in terms of public service, the starting place is uncomfortably similar each year to the previous year, as the freeze allows an increase of less than five percent in the local property tax levy.

#### Limits

Even before the budget cutbacks of the Reagan Administration, America was moving towards limited growth in government. In the summer of 1978, spurred on by the success of Proposition Thirteen in California, forty-four tax expenditure limitation (TEL) proposals were initiated in twenty-seven states, with voters approving eight of thirteen tax limits and four of seven expenditure limits in seventeen states.<sup>1</sup>

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Indiana had earlier led the way for braking government with a constitutional provision requiring "not only a balanced budget, but also one which individually balances each component fund account." Further, IC 6-1.1-18-3 places "a limit on the total rate of all ad valorem (value based) property taxes imposed by all the taxing units to which property taxes in a given area are subject." This maximum aggregate tax rate "is the sum of the individual property tax rates imposed by a city, . . . etc. upon any property in any given year."

But the most important and major limitation on local property taxation currently imposed by the state is the 1977 Property Tax Control Package (IC 6-3.5-1-3), which grew out of the original 1973 property tax "freeze." "Like its predecessor, this . . . program sets a limit on the amount of revenue which any local taxing unit may derive from ad valorem property taxation in any given budget year."

#### Costs

In a recent survey by the International City Management. Association, 82% of public library income came from local revenues. This pattern has been generally true in Indiana and the property tax has provided the bulk of the income. Although other local bank and excise taxes, and small state and federal financial support, adds to local revenues, the property tax freeze effectively holds down budgets.

In the case of the Muncie Public Library, after applying a special formula, the State Board of Tax Commissioners approved the following tax levies:

<u>1977</u> <u>1978</u> <u>1979</u> <u>1980</u> <u>1981</u> \$634,710 \$651,024 \$735,525 \$816,691 \$827,868

With a 1981 state-approved Muncie Public Library budget of \$989,949, the economic health of Muncie and Indiana are thus seen as crucial in ensuring the library gains the necessary property and other local taxes to provide the bulk of its revenues.

#### The Problem

The central problem in public sector budgets is that employee compensation (salaries, direct cost fringe benefits, and mandated employer contributions) accounts for approximately seventy percent of most public agencies' operating costs.<sup>5</sup> With utility companies gaining fifteen to twenty percent increases in their charges, and the cost of books and periodicals rising by nearly twenty percent, the public library administrator also worries about the inflationary spiral hitting the staff as consumers. The worry comes down to the question: how can we give employees decent salaries and at the same time meet other budgetary increases, while keeping in mind it is the frozen property tax levy which accounts for most of our income? Where does the public library administrator begin?

Money is part of the problem, and how to get more is the goal. But the library administrator can also never forget the total work situation — from maintaining an open communication system to seeking ways to enrich each employee's job, so personal goals, as well as the organization's, are met. But, still, we come back to the bottom line for most of us — decent salaries. (Of course, this assumes that the manager continually seeks to streamline operations and cut costs, while meeting library service objectives: providing the public's educational, informational, and recreational interests and needs.)

A public library administrator cannot negotiate with the utility companies on their Public Service Commission-approved rates nor stop buying materials to fill the community's needs. Of course, there are sometimes other significant areas in which to cut costs, such as joint purchasing with other governmental entities, or other potential sources of one-time or short-range revenues, such as grants. And automation is bringing many benefits, including savings in personnel time, improvement in services, and elimination of repetitious tasks.<sup>6</sup>

How to get more money, then, becomes a frequent if not every-day search of the public library director.

#### The Political Framework

Public libraries in Indiana have an exceptionally fortunate independence from the political process. The Public Library Law provides for the appointment of members of a local library board by specified officials in a staggered year schedule. While an individual appointment may be politically motivated, the dynamism of the two-party system and the varying initial time periods when the appointment schedule begins, result in change and continuity on a library board. Within generally reasonable parameters of state statute and budgetary accounting and procedures, local public libraries are free to develop services to the communities that make up their taxing districts.

This great advantage, then, of being basically non-political, is one of the strengths of Indiana's public libraries. But the question arises as to how a public library can take advantage of federal funds that flow back into the community through the political filtering process?

One method that has proven successful for our library is to tap federal funds that are available locally through Community Development Block Grants (CDBG). This is besides federal funds that have been coming directly into states for local library support, in particular through the Library Services and Construction Act, and which has helped Muncie Public.

#### Groundwork

Ironically, the impetus in which the library first gained such locally available federal funds arose from outside our institution. In the mid-1970's, the Library attempted, unsuccessfully, to get a bond issue passed for the construction of a new main library. It was to replace a structure built at the turn of the century that was no longer adequate for contemporary library needs and services.

One of the factors in the defeat of the bond issue, although not the major one, was a concern on the part of historic preservationists that the seventy-year-old building would be torn down, just as the old County Courthouse had been leveled several years earlier. The preservationists were able to get the main library listed in the National Register of Historic Places as an historic landmark to ensure the building would remain intact.

In 1979, the same people were instrumental in gaining for the library federal funds through the city's Community Development Department (CD) to replace the very leaky roof and install a new copper dome on the main library. While the roof replacement was very much appreciated, the solution from the library's viewpoint was to build a new building. In the recession of the 1980's, that is not seen as a likely prospect.

But, importantly, the groundwork had been laid for other forays in a search for federal funds for building maintenance. The precedence had been established that a separate governmental entity, with taxing power itself, was entitled to block grant funds. The significance of such funding becoming available for large-scale building maintenance is that the pressure on the public library's personnel budget area is then somewhat lessened.

#### First Steps

In the spring of 1980, the State Library informed public libraries that an energy audit — an examination of the energy efficiency of our facilities — was available free from the state's Department of Commerce. As the branch librarian in one of our newest branch

libraries was seeking to improve the energy efficiency in her facility, as well as to make it more comfortable for staff in the extremely cold weather, we asked for the energy audit for our buildings. Another goal was to install room-darkening glass on the wide front expanse of the building, to reduce glare from the street so we could have better film programming during the day. A third goal of building maintenance at the branch was to enable the handicapped to use the branch more easily through installation of an outside ramp, automatic door, and other interior changes.

A staff member from CD met with us and explained the process in applying for block grant funds, especially the barrier-free changes that were needed. We applied for the funds, and the request came before the Citizens Advisory Council (CAC). The CAC is comprised of representatives from neighborhood associations and aged and handicapped groups, and is the focus for the citizen participation process required in the block grant program.

The request for the insulated, tinted windows won approval rather easily, and the question of handicapped access was referred to the Advocates for Handicapped Rights. The latter advisory group promptly approved funds for barrier-free modifications at the original branch and then at a second one, in order for the handicapped to have access to library service at two different locations in the city. Part of the reason for the quick passage of the access requests was because such modifications are mandated by federal law and CDBG money is specifically made available for this work. The library communicated it wished to improve access but lacked funds, and the Advocates responded positively.

#### Second Steps

As this process continued during the summer of 1980, Leon Jones, the recently-retired director of the library, alerted me to large-scale emergency building repair (tuckpointing and flue work) needed at another branch, a fifty-year-old building. We then examined the original boiler in the building and realized it needed replacement. Suddenly, we were faced with unanticipated large maintenance bills.

A few telephone calls to preservationists and CD staff revealed CDBG funds might be available for these new jobs, so we decided to apply, but without any real hope of gaining the money. In fact, even before these new requests could come before the Citizens Advisory Council, the director of CD told me he was personally opposed to them. He said the library, like other governmental entities in the state, had the power to levy taxes for its needs.

This is a common misunderstanding of the power of a governmental entity, in view of the property tax freeze. Our reading of the criteria for CDBG funds convinced us we were eligible for the funds. These factors were coupled with "political intelligence" that CD felt we had not sufficiently spent library funds to maintain the fifty-year-old building. This was also untrue, and we provided documentation to CD as well as the Citizens Advisory Council.

We also began some politiking: asking and receiving letters of support for maintaining the old branch from the two preservation groups and asking for support from the neighborhood association nearest to the branch. (We had previously built a good relationship with this particular association by the branch librarian attending their meetings and our involving the group in cosponsoring a community forum on coping with unemployment in Muncie.) The result: approval by the Citizens Advisory Council. In fact, CAC suspended its procedures so the request could be quickly forwarded to city council, and the bid process begun before the cold weather made the repair work difficult.

#### The Political Process

It was at this point that the real political process began. We knew the director of CD was still not basically supportive of the advisory approval of the Citizens Advisory Council. The library board and a few friends began low-profile contacts with the city council, keeping in mind the basically non-political nature of our board and the library's need not to become embroiled in a partisan process. But it was natural that board members and other friends would contact city council members whom they knew well enough to ask their support.

Except for a few basically low-key contacts with council members, my role was to ensure that the CD director brought the request forward to city council. Using an indirect approach, I learned the request was not on the next agenda for the council. I then began some gentle communicating with the CD director, inquiring whether he would bring the request forward. Finally, on the day of the council's meeting, one more call by a library board member brought an assurance from the president of the city council that the library's request would be treated favorably.

The city council meeting began at 7:30 p.m. The chamber was packed because of neighborhood zoning controversy: partisanship as well as a generally negative atmosphere hung heavy in the room. Throughout the evening, a number of requests were denied, and it was at the very end of the meeting, at 12:30 a.m., that the library's request came to the floor, not only for the funds but also a sus-

pension of procedures to insure the work would be done before the cold weather. Without saying so, it was also imperative that the request not be delayed and risk being lost in the mass of questions and controversies facing the council.

And so I spoke briefly but with some urgency to the questions asked by the members, having had five hours during the course of the evening, as well as time over the road to the council's chamber, to prepare my thoughts. It was obvious the support was there, thanks in no small part to the library board and a few friends contacting the council members and the years of solid community library service of Leon Jones and the staff.

We gained approval for the funds in the building and improvement area of the budget. In this way, we were able to find a little maneuver room in the very important personnel area of the 1980 budget. Our library and other governmental entities in Indiana need such assistance when the property tax freeze makes decent salaries very difficult. It need hardly be said we planned to return to the well again, with hopes of similar success.

#### Following Through

As it turned out, the original cost estimates for the work were not sufficient so we had to gain additional CDBG funds through the same process. The final amount that we gained was approximately \$25,000 and, just as important, we began to understand and become part of the process.

In particular, I began attending meetings of the Citizens Advisory Council and soon was asked by the Delaware County Council on the Aged and Aging to represent it at CAC meetings. I also attended meetings of the Advocates for Handicapped Rights and became an active member of that organization. Library staff developed materials lists on planning for retirement, on death and dying, and on library services and access for the handicapped. Through wide distribution of such book and film lists and publicizing the availability of the materials and services, neighborhood organizations and special interest groups sensed the library's commitment to their needs, and we in turn gained support in our search for additional CDBG funds.

#### Update

Currently, the library is seeking a definite commitment from the city administration for CDBG funds for preservation, energy efficiency and handicapped accessibility of the main library. We have spoken at city council and block grant public hearings; the Citizens Advisory Council has approved our request, and friends of the Library have contacted the mayor and city council members.

The library has proposed a three-year program of nearly \$200,000 in which we would pay an architect to plan and implement the needed building changes, and CDBG funds would be combined with our own building repair funds and private sources that we would seek. We believe the definite commitment of block grant funds would serve as an incentive in gaining private funds. But the city's commitment must be in place ahead of time or else it would be foolish for the library board to hire an architect and certainly there would be no incentive for private sources to help in the large-scale need.

Our argument is simple: the main library is Muncie's only registered landmark structure and a source of community pride; it is an asset to Muncie, and speaks of the quality of life that makes our community attractive to live and work in. The city, thus, has a responsibility in its proper maintenace, along with insuring Muncie has decent sidewalks and other physical improvements. We hope the city will accept this argument.

#### Notes

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  - One enlightening study of fringe benefits used "pay for hours worked" instead of wages as its standard of measurement. This is "the amount remaining from wages after deducations for fringe benefits that represent time-off pay." Thus, in charting the annual pay for hours worked and employer cost for fringe benefits for municipal employees in 1977, the study found the North Central region (which includes Indiana) cost for municipal workers other than police, fire and sanitation:

Pay for hours worked \$10,152 4,285, or 42% Fringe Benefits

6

Quoted from Bernard Jump, Jr., "State and Local Government Employee Compensation: The Fringe Benefit Dimension," in Roy Bahl, Jesse Burkhead and Bernard Jump, Jr., eds, Public Employment and Local Government Finance. Cambridge, Mass: Ballinger, 1980, 159, 190.

- For an overview of public library finance, see R. Kathleen Molz, "The Financial Setting of the Public Library," *Library Quarterly*, October 1978, 416-31.
- For general (although some self-evident) cost-saving ideas in libraries, see Eleanor F. Brown, Cutting Library Costs: Increasing Productivity and Raising Revenues. Metuchen, New Jersey: Scarecrow, 1979. In Muncie, we have been able to buy gasoline for our bookmobile and delivery van through the city, which is lower than the retail gas stations.
- For an in-depth study, see Ann E. Prentice, *Public Library Finance*, Chicago, ALA, 1977.
- As to automation: "Unless there is a commitment on the part of the library to displace positions over time as the use of the computer technology is introduced and expanded, the computer will not reduce or slow the rise of labor costs. (my emphasis AM) Frequently libraries that use computers do not translate these potential savings into actual hard dollar savings but opt instead to use these savings for improved public services or the introduction of entirely new services. Any money saved is simply used elsewhere."
- "There is no research concerning the library's use of the computer to determine the extent of personnel savings. Research conducted in other organizational settings that own and maintain their own computer suggests that clerical positions displaced by the computer are often replaced by a higher paid technical staff associated with the computer." Quoted from Joseph R. Matthews, Choosing an Automated Library System: A Planning Guide, Chicago, ALA, 1980, 4-5.

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