

Ohioana Library Association

House Higher Education Subcommittee

*Ann Braam, Budget Analyst
Legislative Service Commission*

February 22, 2005

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LSC Redbook

for the

Ohioana Library Association

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February 22, 2005

Ohioana Library Association

- Ohioana is supported through a combination of memberships, subscriptions, contributions, and a GRF subsidy.
- Ohioana's staff has been reduced approximately 20% since FY 2003.

OVERVIEW

In 1929, Martha Kinney Cooper, the First Lady of Ohio, invited distinguished Ohioans, representing many groups and areas of the state, to help gather a collection of Ohio books for the Governor's mansion. A few years later the collection outgrew the mansion and was moved into the Ohio Departments Building at 65 South Front Street in Columbus. Ohioana, along with the State Library, is currently located at the Jeffrey Manufacturing Center just outside of downtown Columbus. Today, a 28-member board that includes the Governor's spouse as well as four members appointed by the Governor governs the library.

The Ohioana Library Association encourages and recognizes the creative accomplishments of Ohioans; maintains and preserves a permanent collection of books and music by Ohioans or about Ohio; and disseminates information about the work of Ohio writers, musicians, and other artists. These goals are accomplished through the Ohioana Collection, the *Ohioana Quarterly* and other educational resources, and the Ohioana Awards. Each of these three services relies upon and is dependent upon the others. The Collection is at the core of Ohioana but depends upon both the *Quarterly* and the Awards to generate visibility and support for writers and, subsequently, further monetary and in-kind donations and services to the Collection.

Ohioana Collection

The Ohioana collection consists of approximately 45,000 books, including a wide range of literature, fiction, history, biography, poetry, humor, children's literature, county atlases, and local, church, and family histories; 10,000 pieces of sheet music; scrapbooks; and biographical files on more than 23,000 Ohio writers, artists, musicians, and other notable Ohioans. Approximately 1,000 new book titles are added every year. In FY 2004, a total of 1,407 books were donated to Ohioana, including both books for the collection and review copies, representing a total value of nearly \$30,000. Only 11 books were purchased, at a total cost of less than \$250. Either the author or publisher donates most books added to the collection. Ohioana houses older and rare books, in addition to many newer books, that are often unavailable to the public anywhere else. Donations of rare, older books are more likely now that Ohioana is located in a space that has climate-controlled storage. This facility is easily accessible and has adequate parking and workspace for individual researchers as well as student and other groups.

In January 2000, Ohioana's book holdings began to be added to the State Library of Ohio's electronic catalog, and in March 2002 they were released to the 90 OhioLINK institutions. This makes information about the collection easily accessible to anyone who has access to the Internet. The public access to the Ohioana electronic catalog and the facility has increased the use of the Ohioana collection in recent years.

Ohioana Quarterly and Educational Resources

The Ohioana Library has published the *Ohioana Quarterly* four times a year since 1958. The *Quarterly* contains reviews of new books received by the library. More than 2,000 copies of each issue of the *Quarterly* are distributed to members, subscribers, and friends each quarter. Ohioana staff, primarily the editor, secures new books for review; works with volunteer reviewers; edits and writes material for the quarterly; designs and oversees the production, printing, and distribution of the quarterly; and develops all other educational materials.

For the past three years the *Ohioana Quarterly* has received Ohio Arts Council grants for its Ohio Legacy Series. Last year, Ohioana received additional Arts Council funding, making it possible to have a color cover for each issue of the *Quarterly*, to maintain the size of the *Quarterly*, and to expand its distribution to educators and other participants of educational workshops and other programs. A lower cost printing company was found to print the *Quarterly* as well. In addition, bulk printing of resource lists has been eliminated and lists are now only printed on demand.

Ohioana also provides nine educational resource lists that detail information about Ohio authors, musicians, artists, and books about Ohio. These lists are updated yearly and are distributed free of charge to educators, librarians, and the public upon request. Ohioana has also published the book *Ohio Authors and Their Books* and the Ohioana Ohio Literary Map, as well as other educational resources. Ohioana continues to sponsor the Ohioana Ruth Mount Internship. This internship provides a community learning experience for an Ohio college or university student. This internship pays a stipend to the student.

Ohioana Awards

The Ohioana Library provides recognition to Ohio writers, musicians, and other artists for their creative accomplishments through the annual Ohioana Awards. The Awards recognize excellence in the areas of fiction, nonfiction, poetry, juvenile literature, and “About Ohio or an Ohioan” as well as distinguished service in music or in other areas of the arts and humanities. Awards are also given to high school students and young writers under the age of 30 who have not yet published a book. An award is given each year to an Ohioan of national or international significance who has made a unique and outstanding contribution to our culture and to a native Ohioan whose meritorious career has added distinction to Ohio’s heritage and to the nation. In addition, regional events in Cincinnati and Columbus honor local authors of newly published books. These programs are cosponsored by local libraries, which provide the location and cover the direct expenses for the events. Ohioana staff members provide research, planning, and administrative support for the events.

Designated grants or endowments provide the funds for all of Ohioana’s monetary awards. Some costs of the awards program, such as printing costs for the invitations and programs and luncheon costs for award winners and a guest are underwritten or are provided as in-kind services by local businesses. In the coming biennium Ohioana will continue to solicit donations and in-kind services to further underwrite the direct and indirect costs related to the awards and other recognition programs. The fee for those who attend Ohioana Day covers the direct costs for the luncheon. Ohioana covers staffing costs related to conducting the Awards.

Executive Funding Recommendation

Ohioana requested, and the executive recommended, \$202,134 in funding for both FY 2006 and FY 2007. This amount is equal to estimated spending in FY 2005 and slightly less than spending in FY 2004. Funding at this level will permit Ohioana to continue its current operations at current staffing levels, but will not allow for additional staff.

Summary of FYs 2006-2007 Budget Issues

Ohioana receives a GRF subsidy, representing approximately 70% of Ohioana’s operating budget. This subsidy is used to support Ohioana staff in carrying out their responsibilities related to the Ohioana Collection, the *Ohioana Quarterly*, and the Ohioana Awards. In the current biennium, membership, donations, and usage have continued to increase. While beneficial to Ohioana’s visibility and ability to leverage additional funds, the increased responsibility has been difficult to absorb with current, reduced staffing levels. The responsibilities associated with these core services have made it difficult for Ohioana’s staff to sufficiently focus on further fundraising.

In addition, the subsidy is necessary to support staff efforts to raise additional revenue through other sources. In recent years Ohioana has been involved in a fundraising campaign to secure additional funds. However, staffing reductions necessitated by previous budget cuts have negatively impacted Ohioana’s ability to run the campaign. Most of the funds raised are designated for the long-term endowment of the library or for specific projects, leaving Ohioana to rely on other sources for operational funds. Increasing Ohioana’s funding base will continue to be both a priority and a challenge in the coming biennium in light of staffing reductions.

The following tables highlight: (1) Ohioana’s three major areas of focus and the source and type of funds used to support them and (2) Ohioana’s expenses for each of these three areas. Both tables are based on FY 2004 figures estimated in November 2003. Although these figures have not yet been updated using estimated FY 2005 data, Ohioana believes income and expenses for FY 2005 will roughly follow the FY 2004 pattern.

Ohioana Income, FY 2004				
Income Source/Type	Collection	Quarterly/Education	Awards/Public Program	Total Per Type of Revenue
Independent Cash Income	\$15,000	\$44,000	\$28,000	\$87,000
Donations/In-Kind Services	\$21,000	\$34,000	\$2,000	\$57,000
GRF Subsidy¹	\$75,000	\$69,000	\$71,000	\$215,000
Total Revenue	\$111,000	\$147,000	\$101,000	\$359,000

The GRF subsidy accounts for approximately 70% of total cash revenue. Taking into account donations and in-kind services, the GRF subsidy accounts for 60% of total revenue.

¹ GRF income for FY 2004 represented in this table was estimated by Ohioana in November 2003, based on the budget that had been approved by Ohioana’s Board of Trustees, and prior to budget and staff reductions. However, Ohioana estimates that the proportion of state vs. other funding remained the same as in this table.

As indicated on the table below, staffing and benefit expenses make up approximately 71% of Ohioana’s expenditures.

Ohioana Expenses, FY 2004				
Object of Expense	Collection	Quarterly/Education	Awards/Public Program	Total
Staff/Benefits	\$75,000	\$69,000	\$72,000	\$216,000
Miscellaneous²	\$21,000	\$37,000	\$27,000	\$85,000
Total Expenses	\$96,000	\$106,000	\$99,000	\$301,000

Staffing Levels

Ohioana consists of a staff of four full-time employees, including an executive director, *Ohioana Quarterly* editor, librarian, and library assistant/clerk. This number is down from six in FY 2001 and five in FY 2003.

Ohioana Staffing Levels, by Fiscal Year						
					<i>Estimated</i>	
	2002	2003	2004	2005	2006	2007
Board Members*	28	28	28	24	28	28
Staff	5	5	4	4	4	4
Totals	33	33	32	27	27	27

*Board members are not paid. Board members on this table include ex officio and emeritus members. Ohioana’s nominating committee currently is seeking new members from underrepresented areas throughout the state. Estimates for FYs 2006-2007 reflect these new members.

In FY 2004, the office manager position was eliminated as a result of budget reductions. The library assistant position’s responsibilities have been redefined to include some administrative assistant tasks. This redefinition has helped offset the loss of the office manager position but has resulted in less support for all staff, especially the librarian. Ohioana has saved money by hiring a part-time contracted employee to help assist with bookkeeping and other professional clerical services. This individual does not receive benefits and will cost Ohioana’s operating budget an estimated \$27,300 in FY 2005. Ohioana also utilizes more than 100 volunteers to help with book reviews for the *Ohioana Quarterly*, a service that reduces expenses related to this publication by more than \$26,000 per year.

² “Miscellaneous” includes expenses such as equipment, supplies, postage, phones, fundraising, collection/liability, workshops, cataloging, memberships/subscriptions, PR, preservation, and professional services.

ANALYSIS OF EXECUTIVE PROPOSAL

Ohioana Library Association

Purpose: Ohioana provides a unique service to the state of Ohio by collecting, promoting, publicizing, and making available to the public the cultural, literary, scientific, social, and economic achievements of Ohioans.

Ohioana receives all of its state funding through one line item. The following table shows the Governor’s recommendations for that line item.

Fund	ALI	Title	FY 2006	FY 2007
General Revenue Fund				
GRF	355-501	Library Subsidy	\$202,134	\$202,134
General Revenue Fund Subtotal			\$202,134	\$202,134
Total Funding: Ohioana Library Association			\$202,134	\$202,134

This state subsidy Ohioana receives covers about 70% of the Association's operating costs and supports the following three programs:

- **Ohioana Collection**
- **Ohioana Quarterly/Education**
- **Ohioana Awards**

Ohioana Collection

Program Description: The Ohioana Collection is the first service and the foundation upon which all of Ohioana’s other services are built. This area includes the development, maintenance, and preservation of the collection, as well as the in-house use of the collection for responding to public inquiries and reference requests.

Implication of Executive Recommendation: The Executive recommends \$70,747 in funding for both FY 2006 and FY 2007 for the Ohioana Collection. Funding at this level will provide 35% of the cost of this program and give Ohioana the ability to retain its core staff, and to leverage additional funds and in-kind donations and services.

Ohioana Quarterly/Education

Program Description: The *Ohioana Quarterly* is the main source from which Ohioana generates its independent funding. Nearly 400 books are reviewed in the *Quarterly* each year, and all books are listed and annotated as they are received, with the Ohio connection noted for all books. Ohioana also provides educational resources for Ohio schools, libraries, and the general public.

Implication of Executive Recommendation: The Executive recommends \$64,683 in funding for both FY 2006 and FY 2007. Funding at this level will provide 32% of the cost of this program and will give Ohioana the ability to leverage additional funds and in-kind donations and services.

Ohioana Awards

Program Description: The Ohioana Awards program is a key factor in helping to recognize and promote Ohio's writers, artists, and musicians. The program honors Ohioans who have contributed to the literary and cultural life of the state and provides state and national recognition to these individuals, as well as for Ohio.

Implication of Executive Recommendation: The Executive recommends \$66,704 in funding for both FY 2006 and FY 2007. Funding at this level will provide 33% of the cost of this program and will give Ohioana the ability to secure additional funds and in-kind donations and services.

Permanent and Temporary Law

There are no permanent or temporary law provisions with fiscal effects on the Ohioana Library Association.

General Revenue Fund

GRF 355-501 Library Subsidy

2002	2003	2004	2005 Estimate	2006 Executive Proposal	2007 Executive Proposal
\$225,333	\$220,549	\$206,435	\$202,134	\$202,134	\$202,134
	-2.1%	-6.4%	-2.1%	0.0%	0.0%

Source: GRF

Legal Basis: ORC 3375.61

Purpose: The entire state subsidy for the Ohioana Library Association is contained in this line item. These funds are used to provide and expand its library services to the general public. The state subsidy represents approximately 70% of Ohioana's budget. The remaining funding for the agency comes from contributions, memberships, Ohioana Quarterly subscriptions, and in-kind contributions.

LSC Budget Spreadsheet by Line Item, FY 2006 - FY 2007

<i>Fund</i>	<i>ALI</i>	<i>ALI Title</i>	<i>2004</i>	<i>Estimated 2005</i>	<i>Executive 2006</i>	<i>% Change 2005 to 2006</i>	<i>Executive 2007</i>	<i>% Change 2006 to 2007</i>
<i>OLA Ohioana Library Association</i>								
GRF	355-501	Library Subsidy	\$ 206,435	\$202,134	\$ 202,134	0.0%	\$ 202,134	0.0%
General Revenue Fund Total			\$ 206,435	\$ 202,134	\$ 202,134	0.0%	\$ 202,134	0.0%
Total All Budget Fund Groups			\$ 206,435	\$ 202,134	\$ 202,134	0.0%	\$ 202,134	0.0%