

Joint Legislative Committee on Performance Evaluation and Expenditure Review (PEER)

Report to
the Mississippi Legislature



A Limited Review of the Mississippi Library Commission

The PEER Committee focused its analysis on whether the Mississippi Library Commission (MLC):

- fulfills its statutory responsibilities;
- uses its strategic plan to position the agency to fulfill its statutory responsibilities and to assist the state's public libraries in meeting the future needs of citizens; and,
- properly administers its state grant programs to local public libraries.

PEER found that while MLC's activities generally fulfill the agency's broad statutory powers and duties, MLC has not yet implemented specific provisions of state law requiring the development of a statewide master plan and an accreditation program for public libraries.

Concerning MLC's strategic plan, based on the powers and duties of MLC established in state law, the elements of MLC's strategic plan are both comprehensive in scope and relevant to meeting future needs of the state's public libraries. The plan addresses major aspects of public library development, management, and operations and includes objectives designed to improve MLC's internal operations. However, the plan lacks definitions of critical terms and conversion of plan objectives into measurable terms. Thus an external reviewer (such as PEER) must create ad hoc measures to verify the agency's progress in meeting its stated goals and objectives.

Concerning MLC's state grant programs to local public libraries, due to MLC's insufficient oversight of the expenditure of personnel incentive grant funds by local public library systems, MLC cannot ensure that state personnel incentive grants are being used for their intended purpose of improving the qualifications of Mississippi's public library staffs.

PEER: The Mississippi Legislature's Oversight Agency

The Mississippi Legislature created the Joint Legislative Committee on Performance Evaluation and Expenditure Review (PEER Committee) by statute in 1973. A joint committee, the PEER Committee is composed of seven members of the House of Representatives appointed by the Speaker and seven members of the Senate appointed by the Lieutenant Governor. Appointments are made for four-year terms with one Senator and one Representative appointed from each of the U. S. Congressional Districts. Committee officers are elected by the membership with officers alternating annually between the two houses. All Committee actions by statute require a majority vote of four Representatives and four Senators voting in the affirmative.

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The Committee assigns top priority to written requests from individual legislators and legislative committees. The Committee also considers PEER staff proposals and written requests from state officials and others.

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The Mississippi Legislature

Joint Committee on Performance Evaluation and Expenditure Review

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December 21, 2004

Honorable Haley Barbour, Governor
Honorable Amy Tuck, Lieutenant Governor
Honorable Billy McCoy, Speaker of the House
Members of the Mississippi State Legislature

On December 21, 2004, the PEER Committee authorized release of the report entitled **A Limited Review of the Mississippi Library Commission.**

A handwritten signature in black ink, appearing to be "L. Posey".

Senator Lynn Posey, Chair

This report does not recommend increased funding or additional staff.

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A Limited Review of the Mississippi Library Commission

Executive Summary

Introduction

The PEER Committee reviewed the Mississippi Library Commission (MLC), focusing its analysis on whether MLC:

- fulfills its statutory responsibilities;
- uses its strategic plan to position the agency to fulfill its statutory responsibilities and to assist the state's public libraries in meeting the future needs of citizens; and,
- properly administers its state grant programs to local public libraries.

Background

Role of the Library Commission

In 1926, the Legislature established the Mississippi Library Commission to provide advice to those seeking to establish libraries, operate traveling libraries, collect data from the state's libraries, and make an annual report to the Legislature.

Today, MLC provides the state's public libraries with advice, continuing education, and technical support, as well as state grants and assistance in obtaining federal grants. MLC also provides the following direct services to library patrons:

- books and materials for the blind and physically handicapped;
- reference services; and,
- access to its depositories of public documents and patents and trademarks.

Composition and Staffing of the Mississippi Library Commission

MISS. CODE ANN. § 39-3-101 (1972) created the Mississippi Library Commission, consisting of five members, four of whom are appointed by the Governor. The fifth member is the president of the Mississippi Federation of Women's Clubs, or a member of said federation recommended by her. Members of the commission serve five-year terms. The commission meets every other month beginning in January.

As of June 30, 2004, MLC had fifty-six authorized full-time staff positions organized into three bureaus: Administrative Services, Network Services, and Public Services.

Revenues and Expenditures

In FY 2004, MLC received \$10.3 million in state general funds, \$1.8 million in federal funds, and \$.8 million in other revenues, including educational enhancement funds. Its total FY 2004 expenditures were \$12.9 million. In FY 2004, MLC expended \$7.4 million in state general funds on its three state grant programs, representing 58% of the agency's total expenditures and 72% of its FY 2004 general fund appropriation.

Compliance with Enabling Statutes

While MLC's activities generally fulfill the agency's broad statutory powers and duties, MLC has not yet implemented, after two attempts in 1988 and 1992, specific provisions of state law requiring the development of a statewide master plan and an accreditation program for public libraries.

MLC has the systems and activities in place to fulfill all of its statutory powers and the majority of its statutory duties. The two statutory duties that MLC has not fulfilled are its duties to develop a statewide master plan and to develop an accreditation program for local public libraries.

MLC initiated efforts to fulfill these statutory mandates, but such efforts never yielded a public library accreditation program or statewide master plan. In compliance with the Mississippi Statewide Library Development System Act of 1988, MLC appointed two Public Library Standards Committees, one in 1988 and one in 1992. However, neither committee was successful in establishing a master plan or library accreditation program, in part because of controversy over tying state funding to accreditation standards performance.

Because MLC has not developed a statewide master plan or a public library accreditation system, it does not have all of the tools it needs to assist in planning efforts designed to ensure statewide access to efficient, quality library services or in ensuring public accountability for these library systems.

Strategic Plan

Based on the powers and duties of MLC established in state law, the elements of MLC's strategic plan are both comprehensive in scope and relevant to meeting future needs of the state's public libraries. However, MLC has not defined critical terms or converted plan objectives into measurable terms.

Strategic planning is a way to identify and move toward desired future conditions. In the context of state government, strategic planning positions agencies to meet their statutory mandates efficiently and effectively. Strategic planning is especially important to MLC to ensure that the agency is able to assist libraries in successfully adapting to the rapidly changing needs of customers.

MLC's strategic plan addresses major aspects of public library development, management, and operations. The plan also includes objectives designed to improve MLC's internal operations. However, the plan lacks definitions of critical terms and conversion of plan objectives into measurable terms. Thus an external reviewer (such as PEER) would have to create ad hoc measures to verify the agency's progress in meeting its stated goals and objectives.

While MLC's internal reports on program activities may be sufficient for the agency's own purposes, these reports are not sufficient to allow external reviewers to verify progress the agency is making toward achievement of the goals and objectives of its strategic plan.

State Grant Programs to Public Libraries

Due to MLC's insufficient oversight of the expenditure of personnel incentive grant funds by the local public library systems, MLC cannot ensure that state personnel incentive grants are being used for their intended purpose of improving the qualifications of Mississippi's public library staffs. Also, because MLC's appropriation bills do not specify the amount of general funds to be devoted to state grant programs for libraries, no audit trail exists with which to track the funds and determine whether they are being used for their intended purposes.

The Mississippi Library Commission administers three programs that provide state general fund grants to public libraries: personnel incentive, health insurance, and life insurance. In FY 2003, these programs provided \$7.4 million in state general funds to local public libraries, comprising approximately 19% of these libraries' total operating income.

Personnel Incentive Grants

MLC's Personnel Incentive Grants Program was designed to enable the state's public libraries to compete with other states for trained professional librarians and to encourage those already employed to upgrade their educations. MLC allocates its Personnel Incentive Grant funds using a two-tiered formula. The commission distributes a portion of the funds on a per county basis and the remainder of the funds on a per capita basis. Since 1971, according to MLC's records, the state has provided \$84.3 million in general funds for personnel incentive grants to local public library systems.

Health and Life Insurance Grants

MISS. CODE ANN. Section 25-15-15 (1972) requires the state to provide 50% of the cost of the state's life insurance plan and 100% of the cost of the state's health insurance plan for all active full-time employees, including employees of public libraries. Subsection (2) of MISS. CODE ANN. Section 25-15-15 (1972) further requires the state to provide annually the funds necessary to pay the health insurance costs of public library employees by line item in MLC's appropriation bill. Through FY 2004, MLC distributed the funds to the state's forty-seven library systems on a two-month reimbursement basis--i.e., every other month each system submitted a claim for reimbursable health and life insurance payments made by the system. On July 1, 2004, MLC began distributing the funds on a monthly basis.

Oversight of the Grant Program

Due to MLC's insufficient oversight of the expenditure of personnel incentive grant funds by the local public library systems, MLC cannot ensure that state personnel incentive grants are being used for their intended purpose of improving the qualifications of Mississippi's public library staffs.

MLC does not have adequate standards with which to govern the expenditure of personnel incentive grant funds.

Currently the only requirement for personnel incentive grants concerning staff qualifications is that the library system administrator must have a master's degree in library science from an American Library Association-accredited school. The absence of specific MLC standards regarding qualifications of library staff below the level of the system director weakens the link between funding of personnel and improvement of the quality of library personnel.

MLC does not have adequate auditing of personnel incentive grant expenditures.

While PEER determined that all library systems submitted audit reports to MLC in FY 2003, none of the reports contained auditor's comments relating to compliance with Personnel Incentive Grant requirements, which was a stipulation of the Terms and Conditions of the Grant Agreement. Without this assurance, Personnel Incentive Grant funds could be used for library expenditures that are not related to personnel.

Because MLC's appropriation bills do not specify the amount of general funds to be devoted to state grant programs for libraries or the specific purposes of these programs, no audit trail exists with which to track the funds and determine whether they are being used for their intended purposes.

MISS. CODE ANN. Section 25-15-15 (1972) requires the state to provide annually the funds necessary to pay the health insurance costs of public library employees by line item in MLC's appropriation bill. Historically, MLC's appropriations bills have included a single amount for "subsidies, loans, and grants" which included all federal and state grant monies, rather than showing health or life insurance funds for library employees or personnel incentive grants as a line item.

In FY 2004 appropriations bills, the Legislature began including MLC's appropriation with funding for education

(“K-12 and other related educational activities”) and changed the format of MLC’s appropriation to a lump sum for general funds and a lump sum for special funds. Therefore, MLC’s appropriation bill has even less detail than in the past and still does not include a line item showing health or life insurance funds for library employees or personnel incentive grants.

While MLC’s budget requests include a specific amount for each grant program, including the Personnel Incentive Grant program, the only legally binding language with regard to agency spending authority is the language contained in the agency’s appropriation bill.

The current method of appropriation does not comply with CODE Section 25-15-15 because it does not specify by line item the funds to be expended on health insurance costs of public library employees. Also, because the appropriation bills do not specifically express the Legislature’s wishes regarding the exact amounts to be expended on state library grant programs, accountability for these funds is reduced. Neither MLC nor an independent third party can track grant amounts back to the appropriation bills and assure that the amounts the agency expends on grants programs are the amounts that the Legislature intended.

Recommendations

1. To meet the statutory mandates, MLC and its fifteen-member Public Library Standards Committee should develop a public library accreditation program with operational performance standards (“levels of library services and resources”) for local public library systems. MLC and the committee should develop performance standards and operational criteria for all sizes of libraries (and their primary jurisdictions) in the areas of governance, administration (including personnel), collections, services, facilities, access, and usage, and any other activity bearing on the public’s utilization of library resources. Following adoption of the accreditation standards, MLC should require local library systems to report their performance on these standards in their annual reports of activities. MLC should then incorporate this information into the annual *Mississippi Public Library Statistics* report.
2. To meet the mandate of MISS. CODE ANN. Section 39-3-363 (1972), MLC should develop a statewide master plan for public libraries, implementing the

accreditation program, including appropriate milestones and timelines specifying progress toward the complete operation of the program.

3. MLC should consolidate output and outcome measures from the various program documents and sources into the strategic plan, or into one companion document. Consolidation of measures would further consistency in reporting and analysis and would increase accuracy of the bi-monthly activity reports of bureau and division directors. These reports are already output- and outcome-oriented, organizing information by “function, statistics, accomplishment, and impact/outcome.” These bi-monthly reports should go two steps further, organizing activities and accomplishments by goal and objective in the strategic plan and by using appropriate outcome measures consistently.
4. MLC should make the plan more outcome-oriented by developing accurate outcome measures for activities in the strategic plan.
5. MLC should develop timelines and milestones that establish time frames for accomplishing objectives and the outcomes that could be expected to be accomplished by the end of the time frame.
6. To ensure the quality of Mississippi’s public library staff, MLC should require that any system receiving Personnel Incentive Grant funds should comply with MLC-prescribed minimum qualifications for all staff employed in librarian positions. MLC staff should randomly audit grant recipients for compliance with this requirement.
7. To account for the expenditure of Personnel Incentive Grant funds, MLC should require that all Personnel Grant recipients annually report the amount of grant funds expended, by position, in their annual audited financial statements that are submitted to the commission.
8. Using existing resources and in conjunction with its development of an accreditation program and statewide master plan, MLC should conduct a policy review to determine how state funds could best be used to ensure improvement of the state’s public libraries and report its findings to the Legislature by December 31, 2005. The review should consider whether the expenditure of state grant monies on items other than personnel would better meet the state’s public library needs.

9. If it wishes to continue the state-funded Personnel Incentive Grant program, the Legislature should consider including the total amount of general funds allocated to the program as a separate line item in the appropriation bill. Also, the Legislature should appropriate a separate line item for its health insurance program payments to local public libraries, as required by subsection (2) of MISS. CODE ANN. Section 25-15-15 (1972), as well as for life insurance funds (although not specifically required by law).

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A Limited Review of the Mississippi Library Commission

Introduction

Authority

Pursuant to the authority granted by MISS. CODE ANN. Section 5-3-57 et seq. (1972), the PEER Committee conducted a limited review of the Mississippi Library Commission (MLC).

Scope and Purpose

Since January 1999, PEER has received several complaints concerning MLC's work environment and personnel practices, as well as the role of the commission. Because some of MLC's personnel issues were in litigation when PEER began this review and PEER does not customarily review matters that are in litigation, PEER decided to focus its analysis on whether MLC:

- fulfills its statutory responsibilities;
- uses its strategic plan to position the agency to fulfill its statutory responsibilities and to assist the state's public libraries in meeting the future needs of citizens; and,
- properly administers its state grant programs to local public libraries. In FY 2004, MLC expended \$7.4 million in state general funds on its three state grant programs, representing 58% of the agency's total expenditures and 72% of its FY 2004 general fund appropriation.

Method

In conducting this review, PEER:

- reviewed relevant sections of federal and state laws, commission minutes, rules, regulations, policies, and procedures;
- interviewed members and staff of the Mississippi Library Commission;
- analyzed the commission's records related to strategic planning, performance measurement, and state grant programs; and,
- researched the literature on public libraries and the role of state library agencies.

Background

Role of the Mississippi Library Commission

MLC provides public libraries with advice, continuing education, and technical support, as well as state grants and assistance in obtaining federal grants.

In 1926, the Legislature established the Mississippi Library Commission (Chapter 180, *Laws of 1926*) for the purposes of providing advice to those seeking to establish libraries, operating traveling libraries, collecting data from the state's libraries, and making an annual report to the Legislature.

Appendix A, page 47, lists MLC's current statutory powers and duties, by category. Today, MLC provides the state's public libraries with advice, continuing education, and technical support, as well as state grants and assistance in obtaining federal grants. MLC also provides the following direct services to library patrons:

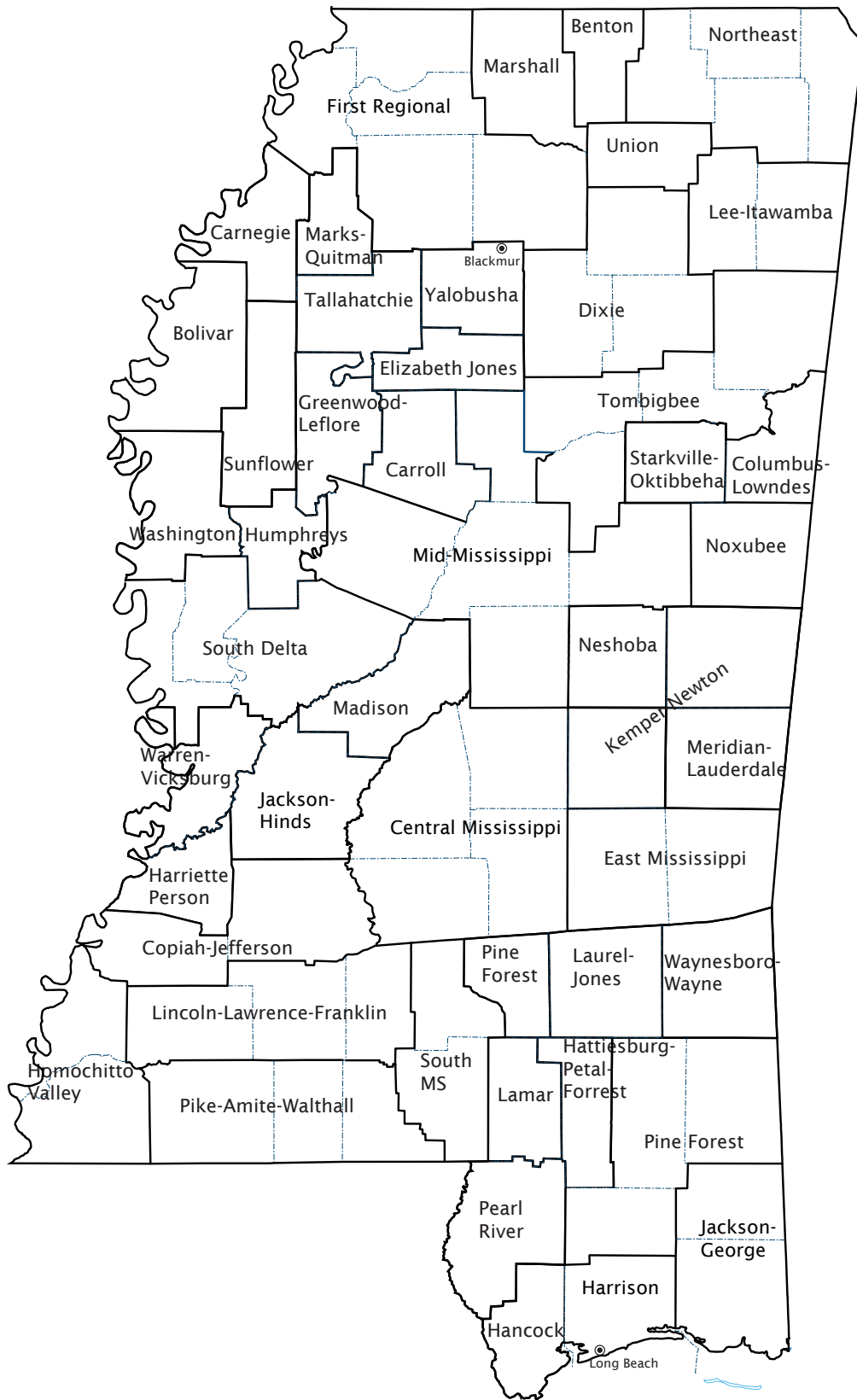
- books and materials for the blind and physically handicapped;
- reference services; and,
- access to its depositories of public documents and patents and trademarks.

Role of Public Libraries

In FY 2003, Mississippi's 241 public libraries expended \$37.6 million on operations and had 1,230 employees.

In FY 2003, Mississippi's 241 public libraries expended \$37.6 million on operations and had 1,230 employees. A map of the state's forty-seven local public library systems and a list of their member counties is found in Exhibit 1, pages 4 and 5. Two of the state's public libraries--Blackmur Memorial Library in Water Valley and Long Beach Public Library--have chosen not to join a system.

Exhibit 1: Public Library Systems in Mississippi as of June 30, 2004



SOURCE: Mississippi Library Commission

Exhibit 1 (continued)

Public Library System	Member Counties
Benton County Library System	Benton
Bolivar County Library System	Bolivar
Carnegie Public Library of Clarksdale & Coahoma County	Coahoma
Carroll County Public Library System	Carroll
Central Mississippi Regional Library System	Rankin, Scott, Simpson, Smith
Columbus-Lowndes Public Library	Lowndes
Copiah-Jefferson Regional Library	Copiah, Jefferson
Dixie Regional Library System	Calhoun, Chickasaw, Pontotoc
East Mississippi Regional Library	Clarke, Jasper
Elizabeth Jones Library	Grenada
First Regional Library	Desoto, Lafayette, Panola, Tate, Tunica
Greenwood-Leflore Public Library System	Leflore
Hancock County Library System	Hancock
Harriette Person Memorial Library	Claiborne
Harrison County Library System	Harrison
Homochitto Valley Library Service	Adams, Wilkinson
Humphreys County Library System	Humphreys
Jackson-George Regional Library	George, Jackson
Jackson/Hinds Library System	Hinds
Kemper-Newton Regional Library System	Kemper, Newton
Lamar County Library System	Lamar
Laurel-Jones County Library	Jones
Lee-Itawamba Library System	Lee, Itawamba
Lincoln-Lawrence-Franklin Regional Library	Lincoln, Lawrence, Franklin
Madison County Library System	Madison
Marks-Quitman County Public Library System	Quitman
Marshall County Library System	Marshall
Meridian-Lauderdale County Public Library	Lauderdale
Mid-Mississippi Regional Library System	Attala, Holmes, Leake, Montgomery, Winston
Neshoba County Public Library	Neshoba
Northeast Regional Library	Alcorn, Prentiss, Tippah, Tishomingo
Noxubee County Library	Noxubee
Pearl River County Library System	Pearl River
Pike-Amite-Walthall Library System	Pike, Amite, Walthall
Pine Forest Regional Library	Covington, Greene, Perry, Stone
South Delta Library Services	Sharkey, Yazoo, Issaquena
South Mississippi Regional Library	Jefferson Davis, Marion
Starkville-Oktibbeha County Public Library System	Oktibbeha
Sunflower County Library	Sunflower
Tallahatchie County Library	Tallahatchie
The Library of Hattiesburg, Petal & Forrest County	Forrest
Tombigbee Regional Library System	Choctaw, Clay, Monroe, Webster
Union County Library System	Union
Warren County-Vicksburg Public Library	Warren
Washington County Library System	Washington
Waynesboro-Wayne County Library System	Wayne
Yalobusha County Public Library System	Yalobusha

MISS. CODE ANN. Section 39-3-1 (1972) acknowledges the role of the state's public libraries in contributing to public education in the following declaration of the policy of the state:

. . .to allow and promote the establishment and development of free public library service throughout this state as a part of its provisions for public education.

Contributions of public libraries to their communities mentioned in the literature include:

- providing all citizens access to information, including access to the Internet and electronic databases;
- literacy through reading programs, including acquiring and circulating supporting materials; and,
- lifelong learning through activities such as pre-school story-time programs, providing assistance to individuals wanting to upgrade their work and life skills, and book clubs for senior citizens.

Further, in many communities, the public library is a focal point for community meetings and can be a source of programs on community concerns.

Advances in computer technology have dramatically changed the ways that libraries manage information and make it available to the public.

Advances in computer technology have dramatically changed the ways that libraries manage information (e.g., computerized inventories of holdings) and make it available to the public (e.g., providing Internet access, electronic holdings). Libraries in increasingly multi-cultural and multi-lingual societies have patrons who want materials in different languages. A rapidly aging society has increasing need for large-print books and magazines. All of these changes present challenges for library managers attempting to anticipate and meet future needs.

Role of the American Library Association

The American Library Association (ALA) was founded in 1876 "to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all." Its membership (over 64,000 in 2004) is open to any person, library, or other organization interested in library service and librarianship.

ALA accredits library science master's degree programs at institutions of higher education to ensure that these programs meet appropriate standards of quality and integrity.

While ALA offers extensive guidance to libraries and state library agencies through publications and activities such as conferences and electronic discussion lists, ALA does not accredit libraries or state library agencies. ALA's only accreditation program is its voluntary accreditation program for institutions of higher education with master's degree in library science programs. The purpose of ALA's accreditation program is to ensure that these programs meet appropriate standards of quality and integrity. In 2004, the University of Southern Mississippi's Master of Library and Information Science degree was the only ALA-accredited program in Mississippi.

Composition of the Mississippi Library Commission

MISS. CODE ANN. § 39-3-101 (1972) created the Mississippi Library Commission, consisting of five members, four of whom are appointed by the Governor as follows:

- two members from the state at large;
- two members from a list of at least six names submitted by the Mississippi Library Association (a chapter of the American Library Association):
 - one of whom shall be a librarian who is a graduate of a library school accredited by the American Library Association and actively engaged in full-time library work at the time of the appointment; and,
 - one of whom shall be, at time of the appointment, a member of a legally organized board of trustees of a Mississippi free public library.
- The fifth member is the president of the Mississippi Federation of Women's Clubs, or a member of said federation recommended by her.

Members of the commission serve five-year terms. Exhibit 2, page 8, lists the members of the Mississippi Library Commission as of November 24, 2004. The commission meets every other month beginning in January.

Exhibit 2: Members of the Mississippi Library Commission as of November 24, 2004

Name	Term Expiration	City of Residence	Type of Appointment
Celia Fisher	6/30/2009	Okolona	Federation of Women's Clubs representative
Larry D. McMillian	6/30/2005	Jackson	Gubernatorial: At-large
Glenda Segars	6/30/2006	Tupelo	Gubernatorial: At-large
Jolee Childs Hussey	6/30/2007	Oxford	Gubernatorial: MLA recommendation: Mississippi public library board member
Pamela Pridgen	6/30/2008	Hattiesburg	Gubernatorial: MLA recommendation: ALA librarian

SOURCE: MLC

Staff

As of June 30, 2004, the commission had fifty-six full-time staff positions.

MISS. CODE ANN. § 39-3-105 (1972) directs the commission to employ a director and other persons necessary to carry out the mission and purposes of the Mississippi Library Commission.

As of June 30, 2004, the commission had fifty-six authorized full-time positions organized into the following three bureaus:

- *Administrative Services*: primarily responsible for internal administrative support and support services for programs to local public libraries, including grant programs;
- *Network Services*: responsible for all technology programs, both internal to MLC and in support of local public libraries; and,
- *Public Services*: organized into three divisions:

- *Blind and Physically Handicapped Services*;
- *Development Services*: consulting to local library systems, continuing education, and training; and,
- *Library Services*: library services directly provided by MLC (refer to discussion on page 12).

Revenues and Expenditures

As shown in Exhibit 3, below, MLC's expenditures declined slightly from \$13.3 million in FY 2001 to \$12.9 million in FY 2004. Also, MLC's general fund appropriations declined from \$11 million in FY 2001 to \$10.3 million in FY 2004.

Exhibit 3: FY 2001-2004 Revenues, Expenditures, and Cash Balances of the Mississippi Library Commission

	FY 2001	FY 2002	FY 2003	FY 2004
Revenues:				
<i>Beginning Cash Balance</i>	\$1,479,151	\$1,376,011	\$1,263,357	\$1,273,319
General fund appropriation	11,027,108	10,125,369	10,336,329	10,303,107
Federal funds	1,642,700	1,643,332	1,440,962	1,755,336
Educational enhancement funds	445,190	470,614	483,874	493,847
Special funds-Miscellaneous funds	115,766	333,272	88,249	59,039
Special Funds-Contingency funds	0	0	0	200,000
Subtotal of Revenues	\$14,709,915	\$13,948,598	\$13,612,771	\$14,084,648
Expenditures:				
Personal services	\$2,156,899	\$2,080,237	\$2,093,021	\$2,130,243
Personal services travel	49,718	25,999	28,802	38,752
Contractual services	2,260,539	2,070,749	1,822,793	801,714
Commodities	337,783	274,202	243,512	256,064
Capital outlay	171,379	7,226	4,875	87,611
Subsidies, loans, and grants	8,357,586	8,226,828	8,146,449	9,549,717
Total Expenditures	\$13,333,904	\$12,685,241	\$12,339,452	\$12,864,101
<i>Ending Cash Balance</i>	<i>\$1,376,011</i>	<i>\$1,263,357</i>	<i>\$1,273,319</i>	<i>\$1,220,547</i>

NOTE: The total expenditures in the category of subsidies, loans, and grants excludes bond proceeds provided to local public libraries on a reimbursement basis as authorized by Chapter 522, *Laws of 1999*; Chapter 583, *Laws of 2000*; Chapter 600, *Laws of 2001*.

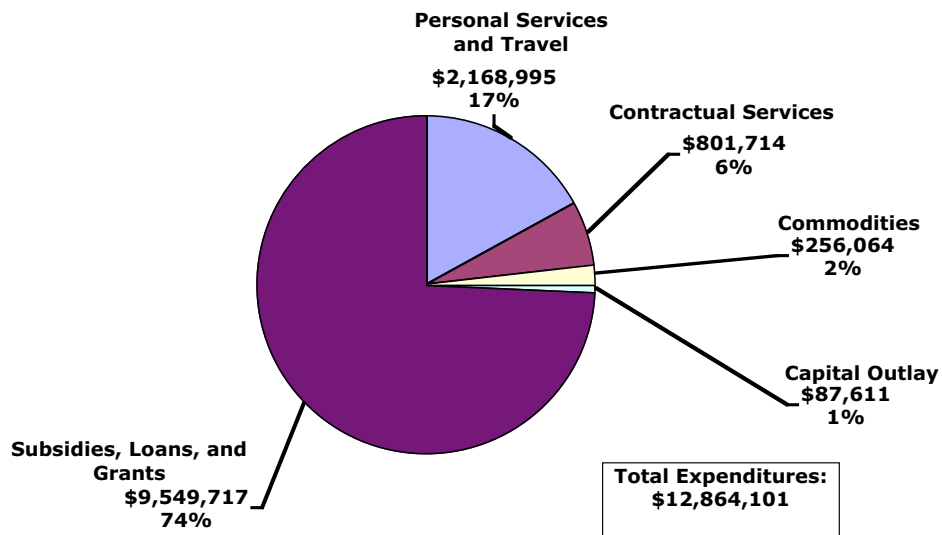
SOURCE: Mississippi Executive Resource Library and Information Network (MERLIN)

The majority of MLC's expenditures (74%) are in the category of subsidies, loans, and grants, which include state and federal funds expended on local public libraries.

As shown in Exhibit 4 on page 10, the majority of MLC's expenditures (74%) are in the category of subsidies, loans, and grants, which include state and federal funds expended on local public libraries. This includes \$7,417,945 in state grants (58% of MLC's total expenditures in FY 2004).

During the 1999 Regular Session, the Legislature passed House Bill 1672, which authorized issuance of general obligation bonds for \$10 million toward the construction of a new facility to house the Mississippi Library Commission. Also, during the 2002 session, the Legislature passed Senate Bill 3197, authorizing issuance of general obligation bonds for an additional \$600,000 for construction of the new MLC building. During its 2003 Regular Session, the Legislature passed Senate Bill 2988, authorizing \$3 million to furnish and equip the new building. The 60,000-square-foot building, which is located at 3881 Eastwood Drive in Jackson, is projected to be completed in June 2005.

Exhibit 4: FY 2004 Expenditures of the Mississippi Library Commission, by Major Object



SOURCE: Mississippi Executive Resource Library and Information Network (MERLIN).

Compliance with Enabling Statutes

While MLC's activities generally fulfill the agency's broad statutory powers and duties, MLC has not yet implemented, after two attempts in 1988 and 1992, specific provisions of state law requiring the development of a statewide master plan and an accreditation program for public libraries.

Summary of Statutory Duties and Powers

Appendix A on page 47 lists MLC's statutory duties and powers. Statutory duties are mandates contained in state law. To be in compliance with a statutory duty, the agency must carry out the duty. Despite the mandatory nature of a "duty," some duties are stated more broadly than others and are therefore easier to comply with technically than others. For example, MLC technically complies with its duty to give advice on library management when it consults with any library on this topic, whereas to comply with its duty to establish an accreditation program, MLC must engage in a labor-intensive effort to develop and implement such a program. Statutory powers differ from statutory duties in that they are activities that the agency is authorized, but not required, to carry out.

As discussed in the section that follows, MLC's powers and duties generally fall into the following categories:

- regulatory;
- advisory;
- direct services;
- state and federal grants; and,
- data/record collection and reporting.

Description of MLC's Activities, by Major Category of Statutory Duty and Power

MLC has the systems and activities in place to fulfill the majority of its statutory duties and all of its statutory powers.

As shown in Appendix A on page 47, PEER determined that MLC complies with all of its statutory powers and all but two of its statutory duties.

MLC complies with all of its statutory powers and all but two of its statutory duties.

A list of MLC's statutory duties, by category, follows with examples of activities MLC conducts to fulfill the duties noted in italics.

Regulatory:

- prescribe educational qualifications for library system directors

MLC requires library system directors to have a fifth-year degree in library science from a school accredited by the American Library Association (see discussions on pages 18 and 36).

Advisory:

- give advice as to the best means of establishing, maintaining, and managing libraries

In FY 2003, MLC's consulting staff made 11,655 contacts with library staffs across the state, spending 2,452 hours in consultation on library issues.

- develop a statewide master plan for public libraries, including plans for levels of library services and resources

MLC has not yet developed a statewide master plan for public libraries (see discussion on page 15).

- establish an accreditation program for local public libraries on the recommendation of a fifteen-member committee established by the MLC Board of Commissioners

MLC has not yet developed an accreditation program (see discussion on page 16).

Direct Services:

- serve as the primary resource library for Mississippi public libraries and develop its collection accordingly

According to interviews with MLC's Executive Director, MLC is tailoring its collection to include professional development material for librarians, complementing its expanding continuing education program; MLC is the primary repository for selected federal and state government documents and patent and trademark information; and, MLC is the primary library for

materials for blind and physically handicapped patrons. Also, MLC's collection serves as a backup for local public libraries and supports the reference service and information needs of state government.

- provide services to libraries in keeping with the goal of efficient use of library resources in the state

MLC's services to public libraries in support of the goal of efficient use of the state's library resources include electronic network development and support, consulting services, grant funding, and direct services regarding unique (or expensive) collections. In FY 2003, MLC's Network Services Bureau (the technology support arm), managing and maintaining a wide area network (MissIN) and a local area network (MissLIB), conducted 103 site visits to local public libraries and provided those libraries with 1,567 consulting hours. MLC provided technology consulting and training to local library staffs on network security and threat mitigation and on basic network design.

- serve as the compact administrator for any interstate library districts

According to MLC's Executive Director, to date no interstate library districts have been established.

State and Federal Grants:

- annually allocate state grant funds to each accredited public library system

MLC annually allocates and oversees over \$7 million in state grant funds to local public libraries (see discussion on page 10). Page 17 includes a discussion of MLC's failure to implement a public library accreditation system.

- adopt rules and regulations relative to allocation of state grant funds to public library systems

MLC promulgates rules and regulations concerning eligibility, distribution, and reporting for the allocation of the State Personnel Incentive Grants to local public library systems and Health and Life Insurance Grants to local public libraries (see discussion on page 36).

Data/Record Collection and Reporting:

- obtain reports from all libraries in the state on relevant facts and statistics (e.g., condition, growth, development)

*MLC obtains data from all local public libraries in the state in a standard format, administered online. The results are published annually in **Mississippi Public Library Statistics**.*

- make an annual report to the Legislature of facts of public interest and value

*In addition to **Mississippi Public Library Statistics**, which illustrates the annual fiscal, physical, and public service conditions of the state's public libraries, MLC issues its own Annual Report documenting the agency's yearly activities.*

- appoint a recorder of documents at MLC to administer the public depository law

MLC appoints a recorder of (state) documents to its staff; the position is equivalent to a Librarian III position in the State Personnel Board's classification.

- serve as the state depository for public records issued by any government agency for public distribution

In FY 2003, MLC received 8,897 state government documents and distributed 7,029 state government documents to member depository libraries.

- distribute to depositories a semiannual list of all state agency publications issued for public distribution

The MLC Executive Director reports that MLC compiles a list of documents available to depositories on a semiannual basis.

- deliver to each depository two copies of each public document requested

MLC delivers paper copies of documents to depositories if it receives sufficient number; if the agency document is available on the agency's website, MLC makes the document available to depositories online.

As discussed in the following section, the two duties that MLC has not fulfilled are its duties to develop a statewide master plan and to develop an accreditation program for public libraries.

Statewide Master Plan and Accreditation Program for Local Public Library Systems

MLC has not developed a statewide master plan for public libraries, nor has it established an accreditation program for local public libraries.

As noted above, MLC has not yet achieved compliance with two of its statutory mandates. Although required by state law to do so, MLC has not developed a statewide master plan for public libraries, nor has the agency established an accreditation program for local public libraries.

The 1987 Public Library Task Force and Resulting 1988 Legislation

The 1988 Statewide Library Development System Act's requirement of tying state aid to accredited public libraries originated from recommendations of the MLC-appointed Public Library Task Force.

The statutory requirements for an accreditation program and statewide master plan came from the recommendations of an MLC-appointed Public Library Task Force in 1987. The Public Library Task Force produced: (1) a draft bill that established the authority for the Mississippi Library Commission to modify the methodology used to distribute state aid to public libraries (including a set of standards for an accreditation program); (2) a model state aid program; and (3) a resource sharing plan for all libraries.

While the standards proposed by the task force in the draft bill for an accreditation program were not adopted by the Legislature in the 1988 Statewide Library Development System Act, the mandates for creating an accreditation program, tying state aid to accredited public libraries, and developing a statewide master plan for public libraries specifying levels of services and resources were included.

State law requires MLC to develop a statewide master plan for public libraries and to develop a system of public service incentives within a public library accreditation program.

MISS. CODE ANN. Section 39-3-355 (1972) of the Mississippi Statewide Library Development System Act of 1988 contains the following specific mandate for MLC:

*The Mississippi Library Commission shall be responsible for **developing a system of public service incentives within a public***

library accreditation program on the recommendation of a committee of qualified public library professionals and trustees. The committee of fifteen (15) members shall be appointed by the Mississippi Library Commission Board of Commissioners as follows: seven (7) public library trustees with at least one (1) from each congressional district; five (5) professional public librarians, one (1) appointed by each commissioner; and three (3) at-large members. [PEER Emphasis Added]

Section 39-3-357 of the act ties state funding to library accreditation:

Each accredited public library system shall receive an annual allocation of state funds to supplement the local appropriation and other income. Library cooperatives which include accredited public library systems may receive state aid. The state aid shall be used only to support library services in accredited public library systems and in cooperatives including accredited public library systems. The amount of the minimum allocation for each public library system shall be based on specific local service levels of the public library system and as identified by accreditation category.

Section 39-3-363 of the act also requires:

*The [Mississippi Library] commission shall **develop a statewide master plan for public libraries**, including plans for levels of library services and resources, which is developed through a continuing process of planning. The master plan must be designed to extend five (5) years into the future and must be made current at least every two (2) years. [PEER Emphasis Added]*

These statutory directives are closely related in function.

A statewide master plan for public libraries and a public library accreditation system are closely related in function.

An accreditation system defines, through the setting of measurable standards, the essential components of a quality institution or program (in this case, a public library). An accreditation system not only provides assurance to the public that an institution or program

conforms to accepted standards of quality, but provides institutions and programs that do not meet accreditation standards with a blueprint for improving their operations.

An accreditation system not only provides assurance to the public that an institution or program conforms to accepted standards of quality, but provides institutions and programs that do not meet accreditation standards with a blueprint for improving their operations.

By requiring that MLC develop a statewide master plan defining levels of library services and resources, the Legislature linked MLC's planning requirement to the requirement for development of a public library accreditation program. A master plan defining different levels of performance standards is the essence of an accreditation program. In MLC's case, the establishment of the requisite master plan would of necessity encompass the establishment of a set of accreditation criteria. The master plan would also include implementation activities for realization of the standards, along with appropriate timelines for accomplishing these purposes. The 1988 Mississippi Statewide Library Development System Act makes these elements interdependent by tying state funding for public libraries (incentives) to the realization of accreditation standards by those libraries.

MLC's Attempts to Fulfill Statutory Mandates Regarding a Library Accreditation Program and Statewide Master Plan

MLC initiated efforts to fulfill these statutory mandates but such efforts never yielded a public library accreditation program or statewide master plan.

In compliance with the Mississippi Statewide Library Development System Act of 1988, in July of that year MLC appointed the first of two fifteen-member Public Library Standards committees.

The 1988 Public Library Standards Committee's sub-committees on Accessibility, Users and Usage of Public Library Resources, Materials Available to Public Library Patrons, and Physical Facilities of Public Libraries drafted recommendations that included specific performance standards for these areas appropriate to three classifications of population size of library jurisdictions. However, the work of this committee ended in November 1989 without adoption of any accreditation standards by the committee or by MLC because of controversy over tying state funding to accreditation standards performance.

MLC appointed a second Public Library Standards Committee in 1992 with three charges. These charges were to:

- determine if there was a "need for a system of public service incentives within a public library accreditation

program for Mississippi public library systems” as mandated by the 1988 legislation;

- prescribe the educational qualifications of Mississippi public library system directors; and,
- prescribe standards for minimal levels of hours of service for public libraries in Mississippi.

The committee was to make recommendations to MLC based on the above determinations.

On the first charge, the 1992 Committee concluded that “a measurable system of standards be adopted and that the minimum level of the standards be the eligibility criteria for personnel grants already in effect.” The Mississippi Library Commission adopted this recommendation, accepting the criteria already in effect as the minimum standards. The eligibility criteria for personnel grants already in effect when the 1992 Committee began its work included federal and MLC regulations requiring local financial maintenance of effort and annual fiscal audits and eligibility criteria set forth in state law--i.e., the requirement in MISS. CODE ANN. Section 39-3-357 (1972) that only accredited public library *systems* can receive state aid funds and the definition of system contained in MISS. CODE ANN. Section 39-3-353 (f) (refer to footnote 3 on page 35).

While the first committee considered adopting specific performance standards for public libraries, the minimum “standards” adopted by the second committee fall short of an accreditation program (as required by state law) that defines the essential components of a quality public library through the establishment of specific local service levels by accreditation category. Definition of a quality public library would include performance standards and operational criteria for all sizes of public libraries (and their primary jurisdictions) in the areas of governance, administration (including personnel), collections, services, facilities, access, usage and any other activity bearing on the public’s utilization of library resources.

Further, the 1992 Committee adopted the position that any additional performance standards for local public libraries recommended to the Mississippi Library Commission would be “goals” and would not be tied to funding, which is contrary to the requirements of CODE Section 39-3-357, which ties state aid to *accredited* library systems, based on specific local service levels as identified by accreditation category.

On the second charge, the Committee recommended and MLC adopted a requirement that public library system

directors have a fifth-year degree in library science from a school accredited by the American Library Association.

On the third charge, rather than prescribing standards for minimal levels of hours of service for public libraries in Mississippi, the committee recommended rescinding the existing hours requirement for public libraries built with Library Services and Construction Act or revenue sharing funds flowing through MLC, substituting a set of goals for public libraries that would explicitly not be requirements for funding:

- libraries serving less than 1,000 city population - 20 hours per week;
- libraries serving 1,000-2,499 city population - 30 hours per week;
- libraries serving 2,500-7,499 city population - 40 hours per week;
- libraries serving 7,500-14,999 city population - 50 hours per week;
- libraries serving 15,000+ city population - 60 hours per week

The committee also recommended that at least one library in the county provide service after 5:00 p.m. and/or on weekends to the service area. The committee also recommended that the local library administration and board of trustees review the hours of service annually. MLC adopted the committee's recommendations.

The issue affecting both committees' attempts to fulfill the master plan/accreditation program mandate was the issue of tying state funding to accreditation standards performance for all public libraries.

The issue affecting both committees' attempts to fulfill the master plan/accreditation program mandate was the issue of tying state funding to accreditation standards performance for all public libraries. Some committee members were concerned that performance standards would penalize libraries in smaller, poorer jurisdictions, particularly since local funding was the primary source of public library resources. If those libraries could not meet such standards, their state funding (mostly for state personnel grants) would be jeopardized. Sixteen years have elapsed since the establishment of these mandates without their fulfillment, and the statutory obligations still remain.

Other States' Efforts in Establishing Performance Standards and Accreditation Programs for Libraries

Other states have been active in establishing performance standards and accreditation programs for their public libraries.

As of 2003, twenty-eight states had published public library standards.

When establishing its own standards for public libraries in 2003, the Texas State Library and Archives Commission determined that twenty-eight states had published public library standards. Among reasons cited by the states for developing standards were to assist in planning efforts, provide an evaluation mechanism and tool for public accountability, and set minimum guidelines for receipt of state aid. In its publication entitled *Public Library Standards in Other States*, the Texas State Library and Archives Commission notes:

Many states, particularly Illinois, Kansas, Oklahoma, Texas, Virginia, and Wisconsin, have included very specific quantitative or numerical formulas for staffing ratios, collection size, budget levels, recommended technology, and other elements, in their standards.

Eighteen states had developed tiered public library standards--i.e., standards that include a base level of service as well as one or more higher levels of service.

The Texas report also notes that eighteen states have developed tiered standards--i.e., standards that include a base level of service as well as one or more higher levels of service. For example, Texas has three levels of standards (essential, enhanced, and excellent) for six population categories ranging from 5,000-9,999 to over 200,000. Tiered standards recognize that while some libraries can barely meet the most basic level of service, all libraries should be striving for the highest levels of service. Accreditation standards provide a measurable definition of quality.

Because MLC has not complied with its statutory mandate to develop statewide master plan for public libraries or a public library accreditation system, it does not have all of the tools it needs to assist in planning efforts designed to ensure statewide access to efficient, quality library services. Also, the lack of a statewide master plan or accreditation system for public libraries reduces public accountability for these library systems.

Analysis of MLC's Strategic Plan

PEER reviewed MLC's strategic plan, required by state law as part of the annual budget process, to determine whether the agency is using the plan to position itself to fulfill its statutory responsibilities and to assist the state's public libraries in meeting the future needs of citizens.

Based on the powers and duties of MLC established in state law, the elements of MLC's strategic plan are both comprehensive in scope and relevant to meeting future needs of the state's public libraries. However, because MLC has not defined critical terms or converted plan objectives into measurable terms, an external reviewer cannot measure the agency's progress in meeting its goals and objectives. Also, MLC's internal reports on program activities are not sufficient to allow external reviewers to verify progress in achieving goals and objectives.

Purpose and Basic Elements of Strategic Planning

Strategic planning is especially important to MLC to ensure that the agency is able to assist libraries in successfully adapting to the rapidly changing needs of patrons.

Strategic planning is a way to identify and move toward desired future conditions. In the context of state government, strategic planning positions agencies to meet their statutory mandates efficiently and effectively. Strategic planning is especially important to MLC to ensure that the agency is able to assist libraries in successfully adapting to the rapidly changing needs of patrons.

Although the literature discusses numerous approaches to strategic planning, most sources recognize that strategic plans share certain basic building blocks, such as a vision statement, mission statement, goals, and objectives (refer to Appendix B, page 49, for a Glossary of Strategic Planning Terms). These elements become increasingly concrete and measurable as one moves from the vision to the activities that will be undertaken to realize the vision. The process of moving from the abstract to the measurable, referred to as the *operationalization* of a strategic plan, involves the establishment of quantifiable objectives, milestones, and time frames. Operationalizing a strategic plan allows an agency to gauge its progress in meeting goals and objectives and to make adjustments when activities are not yielding desired outcomes. Operationalization also allows external reviewers to hold

the agency accountable for the effective use of scarce resources.

Requirements for Planning in State Law

MISS. CODE ANN. Section 27-103-129 (1972), which went into effect in FY 1996, requires all general and special fund agencies to include in their annual budget requests:

. . . a five-year strategic plan for the agency which shall include, but not be limited to, the following items of information:

- (a) a comprehensive mission statement,*
- (b) performance effectiveness objectives for each program of the agency for each of the five (5) years covered by the plan,*
- (c) a description of significant external factors which may affect the projected levels of performance,*
- (d) a description of the agency's internal management system utilized to evaluate its performance achievements in relationship to the targeted performance levels,*
- (e) an evaluation by the agency of the agency's performance achievements in relationship to the targeted performance levels for the two (2) preceding fiscal years for which accounting records have been finalized.*

These requirements place a heavy emphasis on operationalization of the strategic plan, focusing on the inclusion of quantifiable targets and measures of effectiveness for every program.

American Library Association Standards for Strategic Plans

The American Library Association, in *Standards for Library Functions at the State Level*, Third Edition (1985), establishes three standards related to the strategic planning of state library agencies such as MLC. Since ALA does not accredit or certify state library agencies (see discussion on page 7), these standards are suggested guidelines designed to help state library agencies to achieve efficient and effective operations.

To follow these standards, a state library agency must:

- exercise leadership and participate in the development of plans for providing service through all types of libraries, taking initiative in marshalling individuals, groups, and agencies to engage in such planning;

- initiate and encourage research, planning, and evaluation relating to the library service and information needs of citizens and to alternatives for meeting these needs; and,
- indicate in the state plan library functions and services financially assisted or coordinated at the state level, the structure by which they are coordinated, the access to them by all types of libraries, and the standards to be used in planning and evaluating them in terms of use by citizens.

Once again, accountability is emphasized, as these standards focus on development of the standards to be used in planning and evaluating public library functions and services.

The Mississippi Library Commission's Strategic Plan

Development of MLC's Strategic Plan

Since its inception, MLC has collected data from the state's public libraries that can be used in its planning efforts. Much of the data collected by state library agencies such as MLC is part of a formal library statistics program initiated by the National Center for Education Statistics in 1989. The center publishes the public library data in an annual report showing national averages and state comparisons. The data includes information on public library usage, holdings, staffing, and funding. Also, on an ongoing basis, MLC informs its planning efforts by conducting its own trend analyses of public library data such as holdings, programming, usage, patrons, and financial support from major sources. MLC staff consultants to local library systems also gather information on local library system needs.

An FY 2002 needs assessment identified funding, technology, and staffing as the top three challenges for local library directors.

In FY 2002, the commission undertook the additional step of hiring an independent consultant to provide additional information to aid in the development of MLC's strategic plan. The consultant conducted a formal assessment of needs of the state's public libraries by holding focus group interviews with local library system directors in six areas of the state and with MLC staff. He also solicited input

from the MLC commissioners and from the Advisory Committee to the Blind and Physically Handicapped Library Services program.¹

The needs assessment identified funding, technology, and staffing as the top three challenges for local library directors.

Content of MLC's Strategic Plan

In conjunction with its ongoing collection and analyses of public library data, MLC used the results of the needs assessment to develop its vision statement, mission statement, and strategic plan in 2002. MLC's vision statement is "that all Mississippians have access to quality library services in order to achieve their greatest potential, participate in a global society, and enrich their daily lives." MLC's mission is to be "committed—through leadership, advocacy, and service—to strengthening and enhancing libraries and library services for all Mississippians."

Exhibit 5 on page 25 lists the five goals and twenty-three objectives of MLC's Strategic Plan developed in 2002. Although not included in Exhibit 5, the plan also includes at least one activity for most objectives. For example, the activities listed in the plan under goal 3, objective 1, are:

- *Develop and implement a comprehensive technology plan for the Library Commission.*
- *Develop a comprehensive funding program for technology.*
- *Provide links to expertise.*

Analysis of the Elements of MLC's Strategic Plan

Based on the powers and duties of MLC established in state law, the elements of MLC's strategic plan are both comprehensive in scope and relevant to meeting future needs of the state's public libraries.

MLC's strategic plan addresses major aspects of public library development, management, and operations. The plan also includes objectives designed to improve MLC's internal operations.

¹ This committee includes librarians, patrons, and representatives of organizations that provide services to the visually and physically handicapped. The committee meets twice a year to provide MLC with input regarding its policies, plans, and programs for this special needs service group.

Exhibit 5: Mississippi Library Commission's Strategic Plan, 2002

Goal 1: All Mississippians understand, support, and use libraries.

Objectives:

1. Execute a comprehensive marketing and public relations program promoting libraries and library services
2. Develop advocacy skills in librarians and library trustees
3. Develop a comprehensive multi-year funding plan to encourage steady growth in funding for all libraries at all levels and from all sources
4. Develop an ongoing effort to educate funding sources about the mission, services, and impact of libraries
5. Research and analyze trends, forecasting and communicating implications for library services

Goal 2: All Mississippians have access to well-managed library services through qualified staff and modern facilities.

Objectives:

1. Communicate with all types of libraries in an open, direct and timely manner
2. Strengthen and enhance the management of Mississippi libraries
3. Enhance the knowledge and skills of public library system trustees
4. Recruit, develop, and retain well-trained, well-paid library staff
5. Develop and implement standards for public libraries in partnership with other library groups
6. Provide guidance to public libraries on facilities planning and management

Goal 3: All Mississippians have access to current technology resources through libraries.

Objectives:

1. Strengthen and enhance library management and services through the use of technology
2. Develop the technology skills of library staff
3. Anticipate, communicate, and encourage use of internationally-accepted technology standards and platforms
4. Develop a robust, effective intranet and extranet

Goal 4: All Mississippians have access to quality library resources.

Objectives:

1. Facilitate statewide access to library resources
2. Identify and address library needs of special populations
3. Sustain MLC expertise in use of library resources
4. Develop formal and informal partnerships to share resources

Exhibit 5 (continued)

Goal 5: The Mississippi Library Commission sets and achieves the highest quality standards for effective and efficient internal management and fiscal integrity.

Objectives:

1. Ensure fiscal accountability
2. Communicate in an open, direct, and timely manner
3. Give Library Commission staff the tools necessary to do their jobs
4. Ensure that the agency's organizational structure and staffing plan support the strategic plan

SOURCE: Mississippi Library Commission's Strategic Plan, 2002

For example, MLC activities listed under Goal 5, Objective 3 include:

- *Use job content questionnaires and performance appraisals as staff development tools*
- *Work with Library Commission staff to achieve their professional potential through career pathing.*

The overarching goal of MLC's strategic plan is to ensure that all Mississippians have access to quality library services.

As reflected in its vision statement, the overarching goal of MLC's strategic plan is to ensure that all Mississippians have access to quality library services. MLC articulates its role in achieving this vision as being a leader, advocate, and service provider to the state's public libraries. The following sections discuss the elements of MLC's strategic plan, goal by goal:

- *Goal 1: All Mississippians understand, support, and use libraries.*

MLC proposes achieving this goal primarily by hiring a consultant to market public libraries to the general public and by increasing funding to public libraries through: training public library staff and trustees in fund raising; increasing the fund raising efforts of MLC staff; and educating funding sources about what public libraries have to offer and what challenges public libraries face (based on analysis of trend data) if they do not receive increased funding.

- *Goal 2: All Mississippians have access to well-managed library services through qualified staff and modern facilities.*

MLC proposes achieving this goal by developing: information and expertise networks in library management and planning; orientation, certification, and training programs for library trustees and staff; and standards for public libraries, including recommended pay scales for public library staff. MLC also plans to work with library science academic programs to ensure that graduates have the necessary skills and to develop internship programs.

- *Goal 3: All Mississippians have access to current technology resources through libraries.*

MLC proposes achieving this goal by developing a comprehensive technology plan, including identifying sources of funds to pay for implementation of the plan; training MLC and public library staff in the use of technology; enhancing consulting skills of MLC's technology staff; ensuring that MLC and the state's public libraries use internationally accepted technology standards and platforms; and continuing to develop and upgrade MLC's intranet and extranet.

- *Goal 4: All Mississippians have access to quality library resources.*

The fourth goal focuses on access to library resources, including the development of: a statewide library card; a virtual union catalog of Mississippi library resources; a comprehensive collection development plan for the state that emphasizes the sharing of specialized resources; and shared and expanded public library databases. This goal also includes activities related to identifying and serving the needs of special populations, including the visual and hearing impaired.

- *Goal 5: The Mississippi Library Commission sets and achieves the highest quality standards for effective and efficient internal management and fiscal integrity.*

The final goal focuses on ensuring that MLC's internal operations are efficient and effective by: strengthening MLC's Standard Operating Procedures; improving internal communications; training MLC staff; working with staff to achieve professional potential through performance appraisals and development of employee career paths; and aligning job duties with the strategic plan.

Analysis of the Operationalization of MLC's Strategic Plan

MLC's strategic plan lacks definitions of critical terms and conversion of plan objectives into measurable terms. Thus an external reviewer would have to create ad hoc measures to verify the agency's progress in meeting its stated goals and objectives.

MLC cannot objectively measure its success in meeting the plan's goals and objectives because it has not turned its strategic plan into an action plan. While MLC has established target dates for "completion" of its activities, it has not sufficiently operationalized these activities--i.e., it has not defined critical terms and converted objectives and activities into clear statements of measurable milestones with accompanying time frames.

MLC has not met the statutory requirements for developing public library standards and has not defined key terms of its strategic plan.

MLC's entire strategic plan hinges on the concept of "quality library services," yet MLC never defines this term. By not defining the term, MLC and the public do not have an objective way of determining whether a library has met the goal of providing quality library services to the public.

By not defining "quality library services," MLC and the public do not have an objective way of determining whether a library has met the goal of providing quality library services to the public.

MLC's failure to define the term is tied to its failure to comply with MISS. CODE ANN Section 39-3-363 (1972) requiring MLC to develop a statewide master plan for public libraries, including plans for levels of library services and resources and with MISS. CODE ANN. Section 39-3-355 (1972) requiring MLC to develop a public library accreditation program (refer to discussion on page 17). Although MLC notes its intention to develop public library standards in its current strategic plan (refer to page 25, Goal 2 Objective 4 for FY 2007-08), these standards, which should serve as a measure of quality library services, are not yet in place.

MLC has not converted its strategic plan's goals and objectives into clear statements of measurable milestones with accompanying time frames.

MLC has not operationalized its activities by converting these activities into measurable milestones with accompanying time frames. By not developing clear statements of measurable milestones with accompanying time frames for most of its activities, MLC cannot demonstrate to an external reviewer its progress in meeting goals and objectives.

For example, MLC projects that it will accomplish its activity of "establishing mutually beneficial relationships

within state government and the Mississippi library community” by December 28, 2007. MLC is conducting this activity pursuant to its objective to “Develop an on-going effort to educate funding sources about the mission, services and impact of libraries.” However, MLC has not defined the entities with which it seeks to establish relationships, the nature of the relationships, or the time frame (with intermediate goals) for establishing these relationships.

In another example, one of the activities listed under Objective 1 of Goal 3 is to “develop and implement a comprehensive technology plan for the Library Commission.” This activity is especially important given the critical role of technology in the modern library, yet MLC did not define the critical components of such a plan or establish a timeline for completion of each critical component. As a result, it is difficult to assess whether MLC successfully completed its technology plan, as it claims to have done as of December 31, 2003. While MLC provided PEER with two technology-related plans as evidence of its completion of this activity, both of the plans were for external parties (a technology plan to qualify for a Universal Service Program discount through the Federal Communications Commission’s E-Rate program and a technology plan created for the Mississippi Department of Information Technology Services) and would have been created regardless of the planning objective in MLC’s strategic plan. Further, MLC completed its E-Rate technology plan in June of 2002, nine months before the claimed start-up date for its comprehensive technology plan.

In contrast to MLC, the Texas State Library and Archives Commission has operationalized its goals and objectives in clear statements of strategies and measures. For example, under the goal of “To improve the availability and delivery of library and information services for all Texans,” the Texas Commission has an objective of “Increase library use by Texans with disabilities to 8 percent of the eligible population by 2009.” An outcome measure listed for this objective is “percent of eligible population registered for Talking Book Program services.” While Texas’s goals and objectives for its library program are not as comprehensive as Mississippi’s, its focus on measurement and accountability in plan implementation is clear.

MLC's Internal Reports on Program Activities

While MLC's internal reports on program activities may be sufficient for the agency's own purposes, these reports are not sufficient to allow external reviewers to verify progress the agency is making toward achievement of the goals and objectives of its strategic plan.

While MLC has made an effort at performance measurement, the commission is not consistent in the quality of its measurement, does not use all relevant data available to it to measure impact/outcome, and does not link its measurement efforts to its strategic plan.

In an attempt to determine whether MLC has developed program effectiveness measures (outputs and outcomes) that could be linked to the strategic plan, PEER reviewed the following MLC program documents: FY 2005 Budget Request and Strategic Plan Annual Update, FY 2003 Mississippi Public Library Statistics, FY 2003 MLC Annual Report, FY 2004 Notes from the Executive Director, and Bi-monthly MLC Bureau/Division program reports to the MLC Board of Commissioners for the period January through June 2004. MLC's bi-monthly reports are formatted to include information on inputs, resource commitments, accomplishments, impacts, and outcomes for each MLC program.

While MLC collects a large amount of public library data that could be used to measure progress toward goals, it does not use the information explicitly for this purpose.

PEER concluded from its review of these documents that while MLC collects a large amount of public library data that could be used to measure progress toward goals, it does not use the information explicitly for this purpose. For example, MLC could use the data that it already collects annually from Mississippi's public libraries on per capita library visits, reference transactions, and circulation as indicators of the success of its marketing programs.

MLC staff is not consistent in the use of performance effectiveness measures.

Also, MLC staff is not consistent in its use of performance effectiveness measures. Several divisions report "accomplishments" and "impact/outcomes" in terms of process measures--e.g., number of actions taken, rather than in terms of the results achieved by taking the actions. For example, in its January/February 2004 Bi-monthly report, the Fiscal Services Division listed its impact/outcome as the amount of grant funds expended rather than the effect that the expenditure of Personnel Incentive Grant funds had on improving the qualifications of public library personnel.

In contrast, the Development Services Division included a meaningful impact measure in its bi-monthly report. The division reported that its consulting visits to public libraries resulted in an increase in the average score of federal Library Services and Technology Act grant proposals from 71.23 in FY 04 to 83.65 in FY 2005. (These

are grants given for the purpose of technology training and collection development.) PEER notes that in addition to reporting the increase in scores, MLC could have reported changes in federal grant funds received for an even more complete measure of impact. Providing grant-writing consulting services to public library staffs could probably be listed under the fund raising intent of Objective 3 of Goal 1 of MLC's strategic plan (refer to page 25), but is not even listed as an activity in the plan. MLC could link this activity to the plan and operationalize it in a format such as the following: increase FY xx federal grant funds by x% by training x public librarian staff in grant writing in x period.

State Grant Programs to Public Libraries

The Mississippi Library Commission administers three programs that provide state general fund grants to public libraries: personnel incentive (refer to discussion in next section), health insurance, and life insurance. In FY 2003, these programs provided \$7.4 million in state general funds to local public libraries, comprising approximately 19% of these library systems' total operating income. Mississippi ranked last in total per capita public library operating income in FY 2001 (the most recent year of national comparative data available), as shown in Exhibit 6 on page 33. However, in FY 2001, Mississippi ranked fourteenth in per capita public library operating income derived from state sources.

PEER reviewed MLC's state grant programs to public libraries to determine whether the agency exercises sufficient oversight of the expenditure of these funds, which represented 58% of the agency's total expenditures and 72% of its FY 2004 general fund appropriation.

Due to MLC's insufficient oversight of the expenditure of personnel incentive grant funds by the local public library systems, MLC cannot ensure that state personnel incentive grants are being used for their intended purpose of improving the qualifications of Mississippi's public library staffs. Also, because MLC's appropriation bills do not specify the amount of general funds to be devoted to state grant programs for libraries, no audit trail exists with which to track the funds and determine whether they are being used for their intended purposes.

Personnel Incentive Grant Program

History and Purpose

At its meeting of February 25, 1970, the Mississippi Library Commission approved a plan for awarding incentive grants to public library systems using state funds. The idea for the incentive grant program came from trustees and administrators of local public libraries in Mississippi. According to the February 25, 1970, minutes of the Mississippi Library Commission, the purpose of the "Incentive Grant for Staff Improvement Program" (later renamed the Personnel Incentive Grant Program) was to provide:

Exhibit 6: FY 2001 Per Capita Public Library Operating Income from State Funds and Total Per Capita Operating Income, by State

<u>State</u>	<u>FY 01 Per Capita Operating Income from State Funds</u>	<u>Ranking</u>	<u>State</u>	<u>Total FY 01 Per Capita Operating Income</u>	<u>Ranking</u>
Ohio	\$43.96	1	Ohio	\$60.11	1
Hawaii	\$17.75	2	New York	\$51.00	2
Pennsylvania	\$6.09	3	Illinois	\$45.26	3
Rhode Island	\$5.75	4	Indiana	\$43.22	4
Maryland	\$4.72	5	Connecticut	\$43.05	5
West Virginia	\$4.63	6	Colorado	\$40.11	6
Delaware	\$3.71	7	Washington	\$39.91	7
Georgia	\$3.62	8	New Jersey	\$37.89	8
Indiana	\$3.52	9	Alaska	\$37.77	9
Illinois	\$3.31	10	Oregon	\$36.16	10
Massachusetts	\$3.26	11	Maryland	\$35.40	11
Virginia	\$2.99	12	Massachusetts	\$34.74	12
New York	\$2.88	13	Rhode Island	\$34.70	13
Mississippi	\$2.54	14	Kansas	\$34.51	14
California	\$2.23	15	Michigan	\$33.17	15
North Carolina	\$2.22	16	Wyoming	\$31.88	16
Florida	\$2.13	17	Nevada	\$31.47	17
Minnesota	\$2.03	18	Wisconsin	\$30.90	18
South Carolina	\$1.74	19	Minnesota	\$30.37	19
Michigan	\$1.62	20	Missouri	\$30.09	20
Arkansas	\$1.60	21	New Hampshire	\$29.06	21
Louisiana	\$1.53	22	Virginia	\$28.23	22
Kentucky	\$1.26	23	Nebraska	\$28.16	23
Alaska	\$1.25	24	California	\$25.58	24
New Jersey	\$1.17	25	Utah	\$25.49	25
North Dakota	\$1.02	26	South Dakota	\$25.19	26
Wisconsin	\$0.98	27	Louisiana	\$25.08	27
Colorado	\$0.97	28	Iowa	\$25.08	27
Alabama	\$0.95	29	Maine	\$23.76	29
Kansas	\$0.84	30	Florida	\$23.49	30
Missouri	\$0.77	31	Vermont	\$23.25	31
Iowa	\$0.77	31	Pennsylvania	\$23.10	32
Idaho	\$0.65	33	Arizona	\$23.10	32
Oklahoma	\$0.63	34	Idaho	\$22.70	34
Connecticut	\$0.61	35	Oklahoma	\$22.43	35
Utah	\$0.41	36	Delaware	\$20.49	36
Nebraska	\$0.39	37	Georgia	\$19.96	37
Montana	\$0.38	38	Kentucky	\$19.94	38
New Mexico	\$0.32	39	Hawaii	\$19.71	39
Tennessee	\$0.27	40	North Carolina	\$19.34	40
Nevada	\$0.26	41	South Carolina	\$18.90	41
Washington	\$0.25	42	New Mexico	\$18.47	42
Oregon	\$0.23	43	Montana	\$17.13	43
Maine	\$0.15	44	Texas	\$16.50	44
Arizona	\$0.13	45	North Dakota	\$16.03	45
Texas	\$0.09	46	Alabama	\$15.32	46
Vermont	\$0.07	47	Arkansas	\$15.10	47
New Hampshire	\$0.03	48	West Virginia	\$14.97	48
Wyoming	\$0.01	49	Tennessee	\$13.82	49
South Dakota	\$0.00	50	Mississippi	\$13.42	50

SOURCE: U.S. Department of Education, National Center for Education Statistics, Federal-State Cooperative for Education Statistics, Federal-State Cooperative System for Public Library Data, Public Libraries Survey Fiscal Year 2001; Table 13: Total per capita operating income of public libraries, by source of income and by state: Fiscal Year 2001

...grants to public library systems to help meet critical needs for trained professional librarians by providing financial support to promote the recruitment and enhance the retention of well-qualified personnel, as well as assist in raising salaries of current employees to a standard salary scale recommended for all library systems throughout the state and officially adopted by the applicant's governing board of trustees.

According to MLC's 1979 Personnel Incentive Grants Program Manual, the state grant funds "enable the state's public libraries to compete with other states for trained professional librarians and to encourage those already employed to upgrade their educations."

In the Personnel Incentive Grant Program's first full year of operation (FY 1973), all county or regional public library systems were eligible to receive grant monies provided that they met the following requirements:

- serve a minimum population of 25,000;
- have an operating budget from local sources in the amount of \$1.25 per capita and a potential of \$2.00 per capita;
- adopt the MLC recommended classification and pay scale plan (This plan included: grades for library employees based on their qualifications; position ratings based on duties and responsibilities; and, pay scales. For example, at the highest end of the plan, Grade I required a fifth-year degree in library science from a school accredited by the American Library Association; a Librarian V position was a library Director serving over 125,000 people; and the annual salary range of pay grade L5-I was \$15,000-\$20,000.);
- raise total and individual salaries 10% or to meet the recommended salary scale during the first year the grant is awarded;
- agree to employ one additional staff member with a fifth-year degree in library science from a school accredited by the American Library Association;

- submit a written statement showing the critical need for a professional librarian and defining the position and responsibilities of the person who would be employed; and,
- sign Compliance Form 441 indicating that the library is in compliance with the Civil Rights Act of 1964².

Libraries receiving the initial grant were eligible for a grant in the second fiscal year provided that they:

- continue all programs started in the initial year of the grant;
- raise all current salaries to meet the recommended scale, provided they did not meet it in the initial year of the grant;
- submit an acceptable plan for some type of formal library cooperation involving two or more counties if such cooperation is not already in existence; and,
- submit a plan for expanding and improving the current library program.

Libraries could qualify for grants in subsequent years by continuing to meet the requirements set forth in the previous years.

MLC's current Personnel Incentive Grant funding formula is based on the public library system's service population and number of counties in the system.

According to MLC staff, during the 1970s and 1980s, MLC experienced problems in holding systems to the MLC recommended classification and pay scale plan for public library staff due to insufficient state and local funding to support the pay plan. With passage of the Mississippi Statewide Library Development System Act of 1988 (refer to discussion on page 15), MLC abandoned its Personnel Incentive Grant program funding formula based on the classification and pay scale plan. As noted on page 16, MISS. CODE ANN. Section 39-3-357 (1972) of the 1988 Act stipulated that "state aid shall be used only to support library services in accredited public library systems³ and in cooperatives⁴ including public library systems" and required MLC to base the amount of the minimum

² Section 601 of Title VI of the Civil Rights Act of 1964 requires that "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity which receives Federal financial assistance."

³ MISS. CODE ANN. Section 39-3-353 (f) (1972) defines *public library system* as "an affiliation of one or more public libraries that (i) is a minimum of one (1) county unit; (ii) has one (1) library administrative board of trustees; (iii) has one (1) library system director; (iv) is established according to Section 39-3-8, 39-3-9, 39-3-11 or 39-3-13, Mississippi Code of 1972; and (v) is supported whole or in part by public funds."

⁴ MISS. CODE ANN. Section 39-3-353 (c) (1972) defines *cooperative* as "any joint effort by two (2) or more library systems to improve library service."

allocation of state aid to accredited public library systems on “specific local service levels of the public library system and as identified by accreditation category” (see discussion on page 17 concerning MLC’s failure to implement an accreditation program for the state’s public libraries as required by state law). In response to passage of the 1988 act and in the absence of an accreditation program, MLC adopted its current Personnel Incentive Grant funding formula, which is based on the public library system’s service population and number of counties in the system.

Funding

According to MLC’s records, since 1971 the state has provided \$84,343,156 in general funds for personnel incentive grants to local public library systems.

According to MLC’s staff, the commission made its first personnel incentive grants to qualifying systems in FY 1971. Exhibit 7 on page 37 shows the historical increase in funding of the Personnel Incentive Grant program from \$46,763 in FY 1971 to its FY 2004 level of \$5.2 million. Since 1971, according to MLC’s records, the state has provided \$84,343,156 in general funds for personnel incentive grants to local public library systems.

Current Eligibility Requirements

MLC makes Personnel Incentive Grant funds available to public library systems as defined in state law (see page 35) that meet its eligibility requirements. As previously shown in Exhibit 1 on pages 4 and 5, Mississippi had forty-seven public library systems as of June 30, 2004.

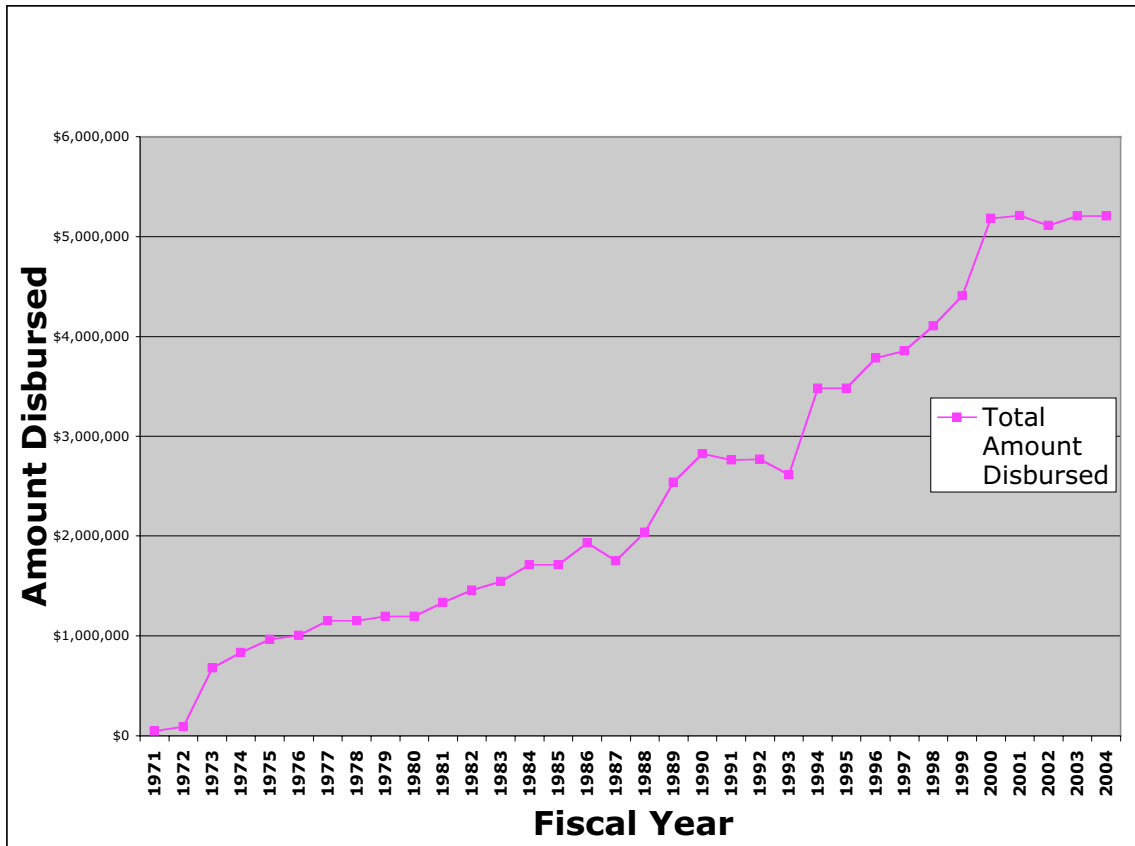
To receive these grants, MLC requires a library system to:

- employ a full-time system director with a fifth year degree in library science from a school accredited by the American Library Association (ALA); and,
- keep adequate books and records (financial) that meet the requirements of the Mississippi Library Commission.

MLC further requires all systems participating in the Personnel Incentive Grant program to:

- submit periodic financial reports; and,
- maintain effort for local income--i.e., the total income for the public library system from public funds (city and/or county) must not fall below that received in the second preceding year.

Exhibit 7: Total Personnel Incentive Grants Distributed by the Mississippi Library Commission to Mississippi Public Library Systems from FY 1971 through FY 2004



SOURCE: Mississippi Library Commission.

MLC’s Personnel Incentive Grant program rules include a waiver process for systems that are unable to meet the educational qualification requirements for the director or the maintenance of local income requirements.

MLC’s Personnel Incentive Grant program rules include a waiver process for systems that are unable to meet the educational qualification requirements for the director or the maintenance of local income requirements. Such systems may apply to the commission for a one-year waiver. In the case of the educational waiver, the commission allows systems to employ a director with at least a bachelor’s degree while a search is made for a qualified person and/or to enable the temporary director to begin work toward a Master of Library Science degree.

As shown in Appendix C on page 50, in FY 2004 one public library system (Tallahatchie County) received a waiver from the commission to receive Personnel Incentive Grant funds on the basis of a decline in income and three systems (Noxubee County, Tallahatchie County, and Union County) received waivers from the commission on the basis of not meeting the system director educational requirement. Also, five additional systems (Carroll

County, Harriette Person Memorial, Humphreys County, Marks-Quitman County, and Yalobusha County) do not meet the system director educational requirement because when new library systems were created and joined the Personnel Incentive Grant Program, the commission “grandmothered” in existing directors and these directors have not yet retired. According to MLC staff, the last of these systems began participating in the Personnel Incentive Grant Program in the early 1980s and no other system directors will be grandmothered in.

Distribution Formula

MLC allocates its Personnel Incentive Grant funds using a two-tiered formula. The commission distributes a portion of the funds on a per county basis and the remainder of the funds on a per capita basis.

MLC distributes a portion of the grant funds on a per county basis and the remainder of the funds on a per capita basis.

The FY 2004 formula provides each system with \$16,378 per member county plus \$1.352183 per person residing within the system based on the 2001 census estimate. For example, in FY 2004 the Harrison County Library System received \$272,494 in personnel incentive grants ($\$16,378 \times 1$ member county + $\$1.352183 \times 189,409$ residents).

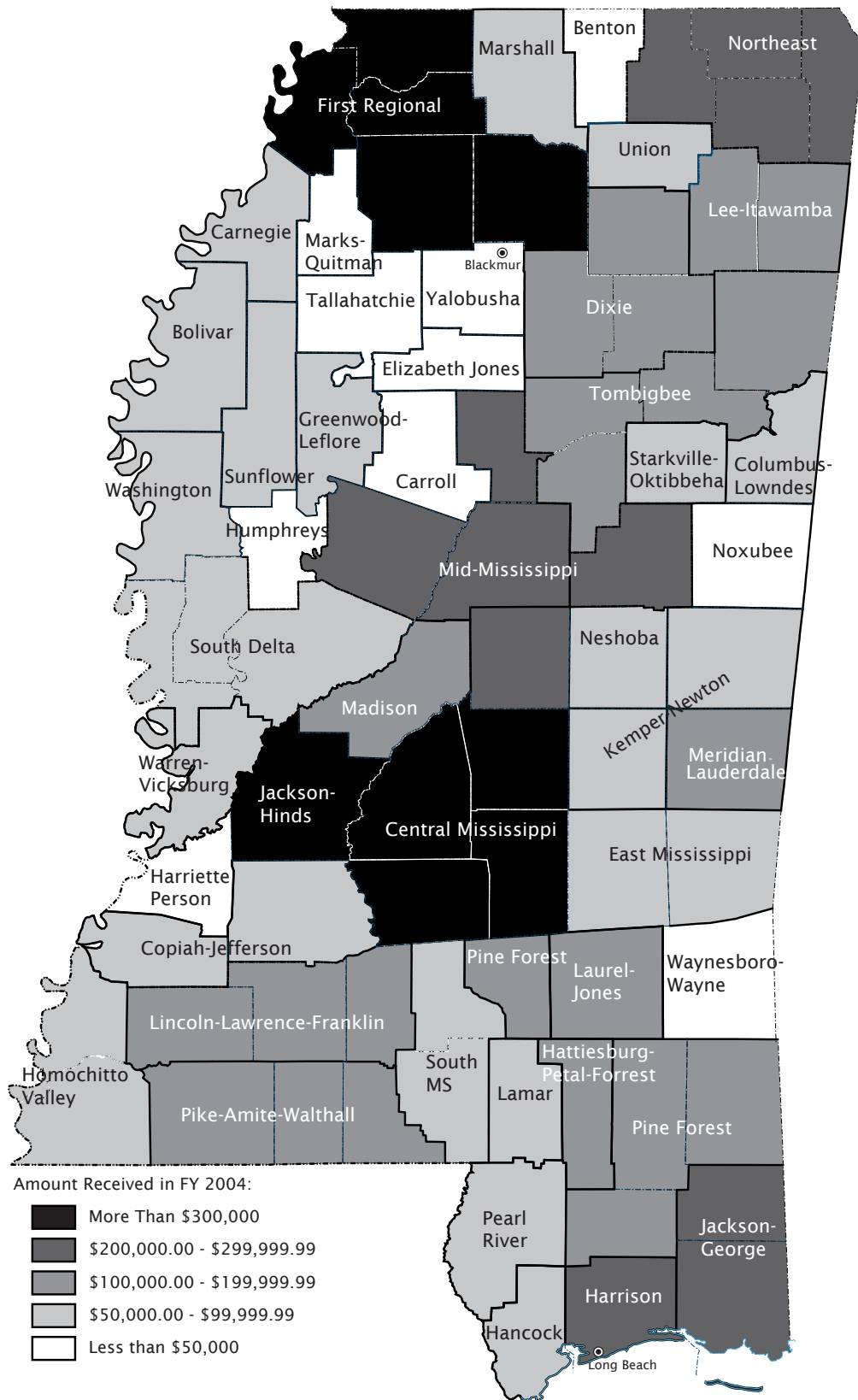
As shown in Appendix C on page 50, in FY 2004 MLC distributed a total of \$5,207,574 in personnel incentive grants, ranging from \$27,128 distributed to the Benton County Library System to \$383,244 distributed to the First Regional Library System. Exhibit 8 on page 39 shows the distribution of FY 2004 personnel incentive grants, by system and size of the grant.

Health and Life Insurance Grants

MISS. CODE ANN. Section 25-15-15 (1972) requires the state to provide 50% of the cost of the state’s life insurance plan and 100% of the cost of the state’s health insurance plan for all active full-time employees, including employees of public libraries. Subsection (2) of MISS. CODE ANN. Section 25-15-15 (1972) further requires the state to provide annually the funds necessary to pay the health insurance costs of public library employees by line item in MLC’s appropriation bill.

Through FY 2004, MLC distributed the funds to the state’s forty-seven library systems on a two-month reimbursement basis--i.e., every other month each system submitted a claim for reimbursable health and life insurance payments made by the system. On July 1, 2004, MLC began distributing the funds on a monthly basis.

Exhibit 8: MLC's Distribution of FY 2004 Personnel Incentive Grants, by System and Size of Grant



⦿ Independent public libraries not part of a library system

SOURCE: PEER Analysis of MLC'S records

According to MLC staff, Blackmur Memorial Library has chosen not to participate in either the health or life insurance grant programs and two libraries (Warren County-Vicksburg Public Library System and Starkville-Oktibbeha County Public Library) have chosen not to participate in the life insurance grant program.

Oversight of the Grant Program

Due to MLC's insufficient oversight of the expenditure of personnel incentive grant funds by the local public library systems, MLC cannot ensure that state personnel incentive grants are being used for their intended purpose of improving the qualifications of Mississippi's public library staffs through recruitment and retention.

MLC does not have adequate standards with which to govern the expenditure of personnel incentive grant funds.

The Standard Grant Agreement entered into by the Mississippi Library Commission and each library system receiving state grant monies specifies that:

The public library system will use state personnel grant funds for personnel costs (base salary, social security, retirement, workmen's compensation, unemployment) only.

The Terms and Conditions of Agreement relative to the Personnel Incentive Grant further state that:

These funds are to be used for the improvement of the public library staff in accordance with the eligibility standards set by the Mississippi Library Commission's Grants Services Division and adopted by the Library System's Board of Trustees.

The absence of specific MLC standards regarding qualifications of library staff below the level of the system director weakens the link between funding of personnel and improvement of the quality of library personnel.

As discussed on page 35, in order to help ensure that Personnel Incentive Grant funds were being used to build a professional library workforce, in the early days of the program MLC required that systems receiving the funds adopt the MLC recommended classification and pay scale plan and apply the funds to full implementation of the plan. While the funds must still be used for personnel costs under the current program, the only remaining requirement concerning staff qualifications is that the system administrator must have a master's degree in library science from an American Library Association accredited school. While the terms of the grant agreement

still direct recipients to use Personnel Incentive Grant funds “for the improvement of the public library staff,” the absence of specific MLC standards regarding qualifications of library staff below the level of the system director weakens the link between funding of personnel and improvement of the quality of library personnel. By not enforcing stricter requirements governing the expenditure of personnel incentive grants, there is no assurance that the systems are using the funds for their stated purpose of improving library staff. In fact, under the current system, a library could use all of its grant money to increase the salary of one individual beyond the competitive pay level for the position.

MLC does not have adequate auditing of personnel incentive grant expenditures.

The Terms and Conditions of the Grant Agreement require that the public library system receiving state funds keep adequate books and records that meet the requirements for grant administration prescribed by MLC and maintain grant project records for a minimum of five years in accordance with MLC’s specifications. The Terms and Conditions also require that each system receiving grant funds from MLC:

...obtain an annual financial audit or compilation conducted in accordance with generally accepted auditing standards and GAO standards. All reports will contain the auditor’s comments on the Owner/Subgrantee’s compliance with this Grant Agreement.

The agreement further requires that a copy of the financial audit report be furnished to MLC by March 31 of each year.

While PEER determined that all systems submitted audit reports to MLC in FY 2003, none of the reports contained auditor’s comments relating to compliance with Personnel Incentive Grant requirements. Without this assurance, Personnel Incentive Grant funds could be used for library expenditures that are not related to personnel.

Because MLC’s appropriation bills do not specify the amount of general funds to be devoted to state grant programs for libraries or the specific purposes of these programs, no audit trail exists with which to track the funds and determine whether they are being used for their intended purposes.

As noted on page 38, MISS. CODE ANN. Section 25-15-15 (1972) requires the state to provide annually the funds

necessary to pay the health insurance costs of public library employees by line item in MLC's appropriation bill. However, historically, MLC's appropriations bills have included a single amount for "subsidies, loans, and grants" that included all federal and state grant monies, rather than showing health or life insurance funds for library employees or personnel incentive grants as a line item.

In FY 2004 appropriations bills, the Legislature began including MLC's appropriation with funding for education and changed the format of MLC's appropriation to a lump sum. Therefore, MLC's appropriation bill has even less detail than in the past and still does not include a line item showing health or life insurance funds for library employees or personnel incentive grants.

In FY 2004 appropriations bills, the Legislature began including MLC's appropriation with funding for education ("K-12 and other related educational activities") and changed the format of MLC's appropriation to a lump sum for general funds and a lump sum for special funds. Therefore, MLC's appropriation bill has even less detail than in the past and still does not include a line item showing health or life insurance funds for library employees or personnel incentive grants.

While MLC's budget requests include a specific amount for each grant program, including the Personnel Incentive Grant program, the only legally binding language with regard to agency spending authority is the language contained in the agency's appropriation bill.

The current method of appropriation does not comply with CODE Section 25-15-15 because it does not specify by line item the funds to be expended on health insurance costs of public library employees. Also, because the appropriation bills do not specifically express the Legislature's wishes regarding the exact amounts to be expended on state library grant programs, accountability for these funds is reduced. Neither MLC nor an independent third party can track grant amounts back to the appropriation bills and assure that the amounts the agency expends on grants programs are the amounts that the Legislature intended.

Recommendations

Compliance with State Law

1. To meet the statutory mandates, MLC and its fifteen-member committee should develop a public library accreditation program with operational performance standards (“levels of library services and resources”) for local public library systems. MLC and the committee should develop performance standards and operational criteria for all sizes of libraries (and their primary jurisdictions) in the areas of governance, administration (including personnel), collections, services, facilities, access, and usage, and any other activity bearing on the public’s utilization of library resources. Following adoption of the accreditation standards, MLC should require local library systems to report their performance on these standards in their annual reports of activities. MLC should then incorporate this information into the annual *Mississippi Public Library Statistics* report.
2. To meet the mandate of MISS. CODE ANN. Section 39-3-363 (1972), MLC should develop a statewide master plan for public libraries, implementing the accreditation program, including appropriate milestones and timelines specifying progress toward the complete operation of the program.

Strategic Planning

MLC could take several specific analytic steps to develop the elements of its strategic plan into a viable, operational strategic plan that could orient and guide most of the programmatic actions of its staff and also ensure the kind of accountability (in terms of evaluating its programs, by self or others) that should be the basic responsibility of all public agencies.

3. MLC should consolidate output and outcome measures from the various program documents and sources into the strategic plan, or into one companion document. Consolidation of measures would further consistency in reporting and analysis and would increase accuracy of the bi-monthly

activity reports of bureau and division directors. These reports are already output- and outcome-oriented, organizing information by “function, statistics, accomplishment, and impact/outcome.” These bi-monthly reports should go two steps further, organizing activities and accomplishments by goal and objective in the strategic plan and by using appropriate outcome measures consistently.

4. MLC should develop accurate outcome measures for activities in the strategic plan and make the plan more outcome-oriented.
5. MLC should develop timelines and milestones that establish time frames for accomplishing objectives and the outcomes that could be expected to be accomplished by the end of the time frame.

Personnel Incentive Grant Program

6. To ensure the quality of Mississippi’s public library staff, MLC should require that any system receiving Personnel Incentive Grant funds should comply with MLC-prescribed minimum qualifications for all staff employed in librarian positions. MLC staff should randomly audit grant recipients for compliance with this requirement.
7. To account for the expenditure of Personnel Incentive Grant funds, MLC should require that all Personnel Grant recipients annually report the amount of grant funds expended, by position, in their annual audited financial statements that are submitted to the commission.
8. Using existing resources, MLC should conduct a policy review to determine how state funds could best be used to ensure improvement of the state’s public libraries and report its findings to the Legislature by December 31, 2005. The review should consider whether the expenditure of state grant monies on items other than personnel would better meet the state’s public library needs.
9. If it wishes to continue the state-funded Personnel Incentive Grant program, the Legislature should consider including the total amount of general funds allocated to the program as a separate line item in the appropriation bill. Also, the Legislature should appropriate a separate line item for its health insurance program payments to local public libraries, as required by subsection (2) of MISS.

CODE ANN. Section 25-15-15 (1972), as well as for life insurance funds (although not specifically required by law).

Appendix A: Statutory Powers and Duties of the Mississippi Library Commission

Miss. Code Section	Power or Duty	Statement of Power or Duty, by Category	Compliance
		Regulatory:	
39-3-17	D	Prescribe educational qualifications for library system directors	yes
39-3-107	P	Fix rules for safekeeping, preservation, care, and handling of books	yes
		Advisory:	
39-3-107	D	Upon request, give advice as to best means of establishing, maintaining and managing libraries (including selecting books)	yes
39-3-363	D	Develop a statewide master plan for public libraries, including plans for levels of library services and resources, which is developed through a continuing process of planning (5 year plan with updates at least every two years).	no
39-3-355	D	Develop a system of public service incentives within a public library accreditation program on the recommendation of a 15 member committee appointed by the MLC Board	no
		Direct Services:	
39-3-359	D	Serve as the primary resource library for Mississippi public libraries and develop its collection accordingly.	yes
39-3-359	D	Provide services to libraries in keeping with the goal of efficient use of library resources in the state.	yes
39-3-209	D	The MLC Director is the compact administrator for any interstate library districts created under 39-3-201.	NA*
39-3-107	P	Purchase and operate traveling libraries among communities, libraries, schools, colleges, universities, library associations, study clubs, charitable and penal institutions free of cost, except for transportation	yes
39-3-107	P	Conduct a clearinghouse for periodicals for free gifts to local libraries	yes
39-3-107	P	Conduct a summer school of library instruction	yes
		State and Federal Grants:	
39-3-357	D	Annually allocate state aid funds to each accredited public library system (may include library cooperatives which include accredited public library systems) to supplement local appropriation and other income. State aid funds can only be used for these purposes and "the amount of the minimum allocation for each public library system shall be based on specific local service levels of the public library system and as identified by accreditation category."	yes
39-3-107	D	Adopt rules and regulations relative to allocation of state aid funds to public library systems	yes
39-3-107	P	Use funds separate from MLC funds to establish, stimulate, increase, improve and equalize library services in the various counties in the state	yes
39-3-107	P	Establish county and regional libraries using funds separate from MLC funds	yes
39-3-111	P	Accept gifts for purpose of promoting MLC work and federal monies for library purposes	yes
39-3-201	P	Appropriate funds to an interstate library district "in the same manner and to the same extent as to a library wholly maintained by it."	yes
39-3-107	P	Fix rules for allocation of funds separate from MLC funds	yes
		Data/record Collection and Reporting:	
39-3-107	D	Obtain reports from all libraries in the state showing condition, growth, development, and manner of conducting such libraries and any other facts and statistics deemed of public interest	yes
39-3-107	D	Make an annual report to the Legislature of facts of public interest and value in relation to the Commission	yes
39-3-107	P	Publish lists and circulars of information as deemed necessary	yes
25-51-7	D	Appoint a recorder of documents at MLC to administer the public depository law	yes
25-51-1	D	Serve as the state depository for public records issued by any government agency for public distribution	yes
25-51-1	P	Designate other authorized entities as depositories (public libraries and libraries of state agencies, public junior colleges, colleges, and public universities)	yes
25-51-5	D	Distribute to depositories semiannual list of all state agency publications issued for public distribution	yes
25-51-3	D	Deliver to each depository 2 copies of each public document requested	yes

*Not applicable because, according to MLC's Executive Director, to date no interstate library districts have been established.

SOURCE: Mississippi Code of 1972, Annotated and PEER analysis.

Appendix B: Glossary of Strategic Planning Terms

Planning: The process of choosing goals and devising steps to reach them over a given span of time. A strategic plan is the organization's explicit linkage between current choices and anticipated results.

Strategic Plan: Requires an organization to:

1. commit to plan and to carry out the plan
2. identify its mandates (such as legal requirements) and its values (the broader purposes and "wants" it sets for itself) in a mission statement
3. identify the external opportunities and threats the organization faces that would either increase or reduce its ability to meet its goals
4. define its strategic issues
5. devise actions that target those strategic issues
 - --remove barriers to action
 - --remedy internal weaknesses
 - --develop a schedule for actions
 - --develop contingency plans

Goal: A statement of public purpose, intention and value at the most general conceptual level. A goal is a set of values, a set of broad policy directions, to be pursued by an organization.

Objective: A statement of part of a goal in more specific, operational, achievable terms. Objectives state what is to be achieved with a policy and who is to be affected by a policy.

Output: An immediate good or service provided by a program, an activity or set of activities taken by an organization to achieve an objective.

Outcome: The intermediate-range result of the implementation of a policy or program. Outcomes are the consequences of outputs.

Timeline: The specific period of time within which each element of a plan, and/or the plan itself, is to be accomplished.

Milestone: major events, phases, or accomplishments that must take place in an orderly fashion for goals and objectives to be accomplished.

Evaluation: Identifying and measuring the outcomes and impacts of a policy or program and judging whether and how well its objectives were (or are being) met.

SOURCES: *Public Administration in America*, Fifth Edition, George J. Gordon and Michael E. Milakovich, New York: St. Martin's Press, 1995; *Public Administration: Policy, Politics, and Practice*, William C. Johnson, Guilford, CT: Dushkin Publishing Group, 1992; "Strategic Planning for Fun and Profit," Terry van der Werff, in *Global Future Report*, May 17, 1999; *Managing the Public Sector*, Grover Starling, Forth Worth, TX: Harcourt Brace, 1998.

Appendix C: FY 2004 Distribution of State Health Insurance, Life Insurance, and Personnel Incentive Grant Funds and Waiver Status, By Public Library or Library System

Public Library or Library System	Financial Waiver	Educational Waiver/ Exemption	Health Insurance Grants	Life Insurance Grants	Personnel Incentive Grants	System Total	Population
Benton County Library System			\$8,208	\$144.00	\$27,128	\$35,480.00	8,026
Blackmur Memorial Library			*	*	not eligible		13,051
Bolivar County Library System			35,568	995.40	70,675	107,238.40	40,633
Carnegie Public Library of Clarksdale & Coahoma County			21,888	954.00	57,090	79,932.00	30,622
Carroll County Public Library System		XX	5,472	158.40	30,902	36,532.40	10,769
Central MS Regional Library System			175,104	4,757.40	324,041	503,902.40	187,571
Columbus-Lowndes Public Library			43,776	1,002.60	98,771	143,549.60	61,586
Copiah-Jefferson Regional Library			24,624	979.20	84,924	110,522.20	38,497
Dixie Regional Library System			27,360	570.60	132,096	160,026.60	61,235
East MS Regional Library			35,568	570.60	81,719	117,857.60	36,104
Elizabeth Jones Library			10,944	90.00	47,394	58,428.00	23,263
First Regional Library			172,368	5,122.80	383,244	560,734.80	214,814
Greenwood-Leflore Public Library			27,360	543.60	66,836	94,739.60	37,947
Hancock County Library System			71,136	2,349.00	75,916	149,401.00	42,967
Harriette Person Memorial Library		XX	5,472	189.00	32,365	38,026.00	11,831
Harrison County Library System			150,480	4,870.80	272,494	427,844.80	189,601
Homochitto Valley Library Service			32,832	783.00	92,568	126,183.00	44,652
Humphreys County Library System		XX	10,944	237.60	31,156	42,337.60	11,206
Jackson-George Regional Library			166,896	3,628.80	238,835	409,359.80	150,564
Jackson-Hinds Library System			169,632	5,243.40	353,741	528,616.40	250,800
Kemper-Newton Regional Library System			19,152	514.80	76,726	96,392.80	32,291
Lamar County Library System			19,152	777.60	71,117	91,046.60	39,070
Laurel-Jones County Library			24,624	862.20	103,642	129,128.20	64,958
Lee-Itawamba Library System			71,136	2,169.00	167,566	240,871.00	98,525
Lincoln-Lawrence-Franklin Regional Library			51,984	1,040.40	123,980	177,004.40	54,872
Long Beach Public Library			13,680	441.00	not eligible	14,121.00	42,967
Madison County Library System			71,136	1,686.60	120,101	192,923.60	74,674
Marks-Quitman County Library System		XX	2,736	82.80	29,988	32,806.80	10,117
Marshall County Library System			8,208	297.00	64,149	72,654.00	34,993
Meridian-Lauderdale County Public Library			51,984	1,341.00	121,056	174,381.00	78,161
Mid MS Regional Library System			103,968	2,554.20	209,618	316,140.20	94,559
Neshoba County Public Library			13,680	284.40	54,937	68,901.40	28,684
Northeast Regional Library			43,776	1,263.60	200,839	245,878.60	100,103
Noxubee County Library		X	5,472	176.40	33,307	38,955.40	12,548
Pearl River County Library System			32,832	835.20	83,945	117,612.20	48,621
Pike-Amite-Walthall Library System			41,040	912.60	140,874	182,826.60	67,695
Pine Forest Regional library			41,040	955.80	145,474	187,469.80	58,466
South Delta Library Services			24,624	545.40	98,424	123,593.40	37,003
South Mississippi Regional Library			24,624	714.60	85,760	111,098.60	39,557
Starkville-Oktibbeha County Public Library System			19,152	*	73,556	92,708.00	42,902
Sunflower County Library			32,832	849.60	62,258	95,939.60	34,369
Tallahatchie County Library	√	X	8,208	72.00	36,174	44,454.00	14,903
The Library of Hattiesburg, Petal & Forrest County			71,136	1,810.80	114,939	187,885.80	72,604
Tombigbee Regional Library System			38,304	1,207.80	173,523	213,034.80	80,045
Union County Library System		X	13,680	302.40	51,240	65,222.40	25,362
Warren County-Vicksburg Public Library			30,096	*	83,099	113,195.00	49,644
Washington County Library System			60,192	1,580.40	99,979	161,751.40	62,977
Waynesboro-Wayne County Library System			13,680	81.00	45,035	58,796.00	21,216
Yalobusha County Public Library System		XX	5,472	117.00	34,373	39,962.00	13,051
			\$2,153,232	\$56,665.80	\$5,207,574	\$7,417,471.80	2,887,625

* According to MLC staff, these public libraries and public library systems have elected not to participate in these grant programs.

X denotes library system directors the commission has waived from educational requirements for a one-year period.

XX denotes library system directors exempt from educational requirements, as a result from being "grandmothered." See pages

36 and 37 of this report.

√ denotes Library System that the Commission has waived from financial requirement for a one year period.

SOURCE: MLC

Agency Response

Mississippi Library Commission

December 15, 2004

Dr. Max K. Arinder
Executive Director
Joint Committee on Performance Evaluation and Expenditure Review
P.O. Box 1204
Jackson, MS 39215-1204

Dear Dr. Arinder:

The Mississippi Library Commission wishes to provide the following response to the PEER staff review/analysis of the Mississippi Library Commission's fulfillment of the agency's statutory responsibilities; use of its strategic plan to fulfill statutory responsibilities and to assist the state's public libraries in meeting citizen needs; and administration of state grant programs to local public libraries.

The PEER's review/analysis covers 33 years. Even though I have been the executive director of the agency only for the past three years, I am confident in responding to the PEER analysis because of the Library Commission's records, staff knowledge, and long-term working relationship with the Mississippi Legislature and the Mississippi public library community.

Statutory Responsibilities

As required by statute, the Library Commission convened, in 1988 and again in 1992, a 15-member Public Library Standards Committee, composed of representatives from the library community, to establish public service incentives [standards] for an accreditation program for public libraries. The 1988 committee was unable to reach consensus due to the concerns and apprehension of public library trustees and administrators about the impact of such standards on the receipt of state aid. The 1992 committee did reach consensus and recommended that an accredited public library system meet the following minimal level of service standards for receipt of state aid:

1. Serves at least one (1) county, on a countywide basis
2. Is legally established
3. Has one (1) administrative Board of Trustees
4. Has one (1) full-time director with a masters degree in library science from an institution accredited by the American Library Association
5. Is supported in whole or in part by public funds
6. Maintains local funding equal to or greater than the second preceding year
7. Provides an annual financial audit to the Library Commission

In addition, the 1992 committee recommended that any other levels of service standards only be suggestions for improvement. The Mississippi Library Commission Board of Commissioners adopted and implemented this recommendation and continues to distribute state aid funds to accredited public library systems based on the work of the 1992 committee.

The Library Commission did not immediately develop a statewide master plan for public libraries. However, in 2002, at my initiative, the agency developed, adopted, and implemented the *Mississippi Library Commission Strategic Plan - Setting Our Direction for the Future*, a five-year plan to ensure that all Mississippians have access to quality public library service.

Strategic Plan

With input from the public library community, the Library Commission's five-year strategic plan sets forth the agency's mission, "... through leadership, advocacy, and service to strengthening and enhancing libraries and library services for all Mississippians." In just two years, the Library Commission has used the plan to successfully move the agency and statewide library services forward in many areas such as strengthening content management and security of MissIN, the statewide telecommunications network for public libraries; establishing a comprehensive annual continuing education program for public library personnel; developing and distributing of a *Resource Guide for Directors of Mississippi Public Library Systems*; expanding and improving agency publications; streamlining federal and state aid grant programs for public libraries; and procuring alternative sources of funding to enhance the agency's services to public libraries.

In addition, the Library Commission has incorporated the goals and objectives of this comprehensive strategic plan into the format prescribed as part of the annual budget process by the State Legislature in the Mississippi Performance Budget and Strategic Act of 1994.

State Grant Programs

The PEER report implies not only that the Mississippi Library Commission's oversight of the state grant programs is insufficient, but that oversight by the Mississippi Legislature and local lay governing library boards is also insufficient. Historical data on state grant programs to public libraries, much of which is included in PEER's own report, provides evidence to the contrary. The Legislature, the Library Commission, and local governing library boards are providing sufficient oversight of these programs.

Health and Life Insurance Grant Programs

Section 25-15-15 of the *Mississippi Code 1972 Annotated* requires the State to "... provide annually, by line item in the Mississippi Library Commission appropriation bill, such funds to pay one hundred percent (100%) of the cost of health insurance . . . for all full-time library staff members" Specifying the amount in the appropriations bill would prevent the agency from paying the full cost of health insurance should the number of public library participants or costs increase. The intent of the Legislature is obviously to provide the flexibility necessary for the Library Commission to fully fund and effectively administer the program.

Personnel Incentive Grants Program

The Personnel Incentive Grants Program is a highly effective state aid grant program for public libraries, unique to Mississippi and envied by the national library community. The grant program fulfills its purpose of providing supplemental funds to assist public library systems in the recruitment and retention of qualified personnel.

Dr. Max Arinder
December 15, 2004
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Growth in the Personnel Incentive Grants Program funding over the years demonstrates legislative confidence in and support of the Library Commission and local governing library boards. This growth is evidenced not only by agency documents and public library system audits, but also by PEER's own research and graphs. Accountability and effective grants management by the agency and local governing library boards includes:

- annual signed letters of agreement outlining local responsibilities for receipt of grant funds.
- required local maintenance of effort to ensure that state funds do not replace local funds.
- reviews of annual public library audits by agency personnel to verify grant awards/income; expenditures for personnel costs; and local maintenance of effort.
- established and monitored waiver processes for financial and educational hardship situations.

Over the last thirty three years, the Mississippi Legislature and the Mississippi Library Commission have worked together to build and support a highly successful grant program to improve public library service in Mississippi. The agency annually requests funding increases for the Personnel Incentive Grants Program and, in accordance with legislative intent, distributes funds on a quarterly basis to public library systems.

There is no evidence that the Library Commission has ever failed to meet legislative intent in allocating funds to the Personnel Incentive Grants Program. To the contrary, the Library Commission has historically protected the grant program at the expense of other agency programs and services. As noted in the PEER report, the Mississippi Library Commission has lost \$700,000 in funding since 2001. These cuts have been managed without impacting the Personnel Incentive Grants Program.

Dr. Arinder, I am proud of the role the Mississippi Library Commission plays in the development and delivery of quality library services in Mississippi. This agency is moving forward and remains true to its mission. Yes, as with any organization, there is always room for improvement. However, the agency takes very seriously its responsibility to fulfill its statutory duties; to use its strategic plan to improve library services; and to administer strong, effective state aid programs that are accountable and responsive to local needs.

Sincerely,



Sharman Bridges Smith
Executive Director

cc: Mississippi Library Commission Board of Commissioners

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