



Fact Sheet

Lincoln County Library District Funding Model 2022-2023

Project Purpose

The District Board wanted to re-examine the basis of the revenue distribution model that has been in use for many years. The need goes beyond trying for a method or formula that satisfies District members, partners, and service providers. The ultimate project purpose was for the Board to decide on a fund use structure and methods that best align with the legislative intent and purposes of the District.

Project Objectives

1. Understand the legislative intent of the District formation and its purposes.
2. Establish the principles and values the Board wants incorporated into funding options analyses.
3. Identify the optimal funding methods and/or formulae to support the intent, principles, and values.
4. Understand how various scenarios will impact the District members, partners, and providers.
5. Ensure that future funding structure and methods most effectively enable the legislative intent and purposes of the District.

Process

August 2021: Contracted with Ruth Metz, Erin McCusker, and Summer Sears to work with the LCLD Board and Director to achieve project purpose.

September – December 2021: Consultants led four public work sessions with the LCLD Board to clarify the legislative intent of District formation in 1988,

determine the values and parameters of the Board in creating the funding model, and explore why the current funding model needed to be updated.

December 14, 2021: Board approved new funding model

Board values

1. Fiduciary responsibility for providing library services to residents of the District service area (everything in Lincoln County outside the city limits of Lincoln City, Newport, Toledo, and Yachats)
2. Service model and funding will be directed toward enabling equitable service to the residents of the District.
3. Allocation of funds will be equitable and fair (equitable for District residents and fair for member and partner libraries)
4. It is not sustainable for the Board to use District funds to restore lost municipal funding to partner libraries and therefore it cannot be a policy of the Board.
5. An understanding should be built and sustained over time between the District administration and the funding recipients about the nature and purpose of the District, Board, and funds.

Funding model parameters

1. Is consistent with the District formation legislative authority and purpose which is to provide library services to the residents of the District service area.
2. Adequately funds centralized and District administrative functions to fund objectives
3. Enables the objectives of the Board's strategic direction for library development, such as in the current and future strategic plans and initiatives of the Board.
4. Differentiates member jurisdictions from non-member jurisdictions and service providers.
5. Is directed toward bringing the full range and standard of service to residents throughout the District service area

6. Delineates the objectives of any formula or combination of formulas.
7. Member and partner recipients of District funds are contractually accountable for using the funds in the interests of the District.

Funding formula parameters

1. Funding objectives are clearly identified and then attached to a formula element that is expected to achieve the objective.
2. Formula elements can be explained to support specific funding model objectives, such as:
 - a. Provides incentives for member jurisdictions to grow local funding levels
 - b. Provides funds for partners to serve District-area residents
 - c. Provides “library as place” allotment.
3. Allocates funds to partner libraries in fair proportion
4. Is based on clear, concrete, factual, impartial, and calculable numbers from reliable sources.
5. Can be applied consistently and administered routinely and mechanically by District staff
6. Can be tuned or changed to improve the alignment of finding with the formula objectives and evolving circumstances.

Adopted Model

Fund District administration 30%
Member libraries’ local revenue incentive 1%
Member and Partner libraries’ site base allotment (library as place) 5%
Member and Partner district-area per capita allotment (based on zip code population) 64%

Effective Date

Funding effective December 2022 for the 2022-2023 fiscal year
Cities and District sign Inter-Governmental Agreements by June 30, 2022