

OLA

Quarterly



Exterior of the new Wayne and Lynn Hamersly Library at Western Oregon University.

Strategic Planning and Libraries

A Planning Process
for State Library
Associations

Strategic Planning at the
Multnomah County Library:
The Past as Prologue

Planning and Political
Support: The Salem
Public Library Experience

Technology Planning:
Oregon State University's
Information Commons

and more...

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Association*

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OLA QUARTERLY

Strategic Planning and Libraries

Libraries plan. They plan for services, for facilities, for collections, for staffing, and for funding. Library associations also plan, both for themselves and on behalf of the library communities they serve. However, in periods of accelerated change, such as the one in which we currently find ourselves, planning can seem analogous to the Greek myth of Sisyphus, whose ongoing punishment in Hades was to roll a huge stone up a hill only to have it roll down again as soon as he had brought it to the summit.

Planning is often seen as the process of forming a long-range picture, yet the constant flux we are currently experiencing can make it almost impossible to look out into the distant future. Sometimes we can make our task easier by bringing our scopes in closer, looking at the short-term picture. Paying close attention to our environment, whether political, economic, demographic, or technological, can help us to shape what we become in the long term.

This was the goal of OLA's Vision 2010 committee, to perform a series of environmental scans—of demographic, political, and economic trends in Oregon, of Oregon's libraries, and of trends within the library profession—to determine what the Oregon library community looks like today, and what it should look like in 10 years. The final report has not yet been completed, but it will provide a plan for Oregon libraries for the next decade, much as OLA's Vision 2000 did for the previous decade.

Also in this issue of *OLA Quarterly* you'll find several articles about planning in libraries, from the development of Multnomah County Library's strategic plan to planning for technology, consortia, disaster, development, and a new building. Contributors are Jeanne Goodrich, Multnomah County Library; Bob Miller, Salem Public Library; John Helmer, Orbis Library Consortium; Richard Griffin, Oregon State University; Faye Chadwell, University of Oregon; and Gary Jensen, Western Oregon University.

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Visions of the Future: A Planning Process for State Library Associations

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The Oregon Library Association is one of the more active and productive chapters within the library profession. Its successes include the passage of important legislation to improve funding for libraries, creative collaboration to enhance efficiency, the widespread incorporation of technology, and the promotion of intellectual freedom issues. One of the reasons behind the Association's success is a long-range strategic planning process that began in the late 1980's.

Vision 2000: a model of success

Vision 2000 was OLA's first significant attempt to develop a planning tool that would determine the goals and activities of the organization over a ten-year period. The final product, submitted to the membership in 1991, was a combination of vision and practicality. For example, the basic vision that "every library will participate fully in a coordinated statewide network that will provide every Oregonian with access to all the library resources in the state" was a bold projection, especially in 1991. That boldness led to several ambitious concepts, such as "all Oregon libraries will participate in a state-funded resource sharing program, providing reimbursement for net lenders." A few short years after this statement was made, several libraries across Oregon were receiving net lender reimbursement checks for their resource sharing contributions.

In addition to major challenges, Vision 2000 included plenty of "low-hanging fruit." These are goals that everyone can endorse without debate, and they are often easy to accomplish. For example, the broad goal of "promoting literacy" is not one that is likely to be controversial. Some of the strategies associated with this goal, e.g. "identify model literacy programs already in place in Oregon libraries and promote their implementation in additional libraries" is an easy task to accomplish, especially compared to the more aggressive changes suggested in the net lender concept. Critics might say that too many easy no-brainers water down the document and provide no substantive direction. At the same time, too many lofty goals that require substantial investments of political clout and money can be viewed as unrealistic. The trick is to get the right mix. Vision 2000 succeeded in this respect.

Vision 2000 was successful for other reasons as well. It was an effective long-range planning tool because it included

an overarching theme that was repeated throughout the document: expanded, equitable library service for all citizens of Oregon. It was a bottom-up process that involved the solicitation of "vision statements" from OLA members and committees. And it became the focal point for several annual OLA planning retreats for new committee chairs and elected board members.

However, few complex projects are flawless examples of efficiency. On the downside, Vision 2000 took three years to complete. In this era of rapid change, it is advisable to keep the process moving at a good pace so that the finished product includes recommendations that are still relevant. The plan incorporated a complicated hierarchy of terms and statements: each goal had several objectives, each objective had a vision statement and several strategies. Sometimes the distinctions between goals, objectives, visions, and strategies can get muddled. The document also included goals that could not be accomplished by the Association. The committee was up front about this, and in the introduction, the chair wrote, "The committee has been shameless in assigning tasks to those over which the Oregon Library Association has no direct authority."

One of the most significant features of the Vision 2000 document was its internal perspective. In other words, it was a reflection of what we, as professional librarians, wanted to accomplish. It was not a response to specific needs of the communities we serve.

It is difficult to say if a different approach would have resulted in a different set of goals and objectives. Sometimes, it is impossible to set aside our long-standing traditions and move swiftly and easily in a new direction. For example, a process that begins with a description of the external environment might determine that the population is aging rapidly. It might also determine that school-age children have the best access to networked resources, but older adults are more apt to be "disconnected" in the information age. Even in this context, it may be difficult to shift our emphasis away from children's services and address the more pressing needs created by demographic, educational, and technological changes. Our plans for the future are strongly influenced by our past practices.

Vision 2010: looking out then looking in

Following the success of Vision 2000, the OLA Executive Board decided to repeat the planning process and create a second committee to articulate a vision and direction for the next decade. The Vision 2010 committee decided early in the process to take a different approach from its predecessor. The strategy was to formulate a description of the environment that should shape any community service. At the same time, the committee would assess the current condition of Oregon libraries and make some general observations about the library profession in general. In this respect, Vision 2010 was a more organic process, growing out of a well-defined context of who we are—as a state, as a service, and as a profession.

See *Visions of the Future* page 21

Planning and Political Support: The Salem Public Library Experience

by *Bob Miller*
Assistant Library Director
Salem Public Library

The Salem Public Library's strategic planning efforts began in 1987 with the publication of its first Library Development Plan. Staff worked with a citizen planning committee to produce the Plan. The surveys, statistical analyses, and consultant work that formed the foundation for the Plan's goals and objectives taught Library managers much about the public's view of the Library and the quality of its services.

The timing of the Plan was fortuitous, in that urban renewal funds became available at about the same time the Plan was published. The combination of thorough planning and good timing led to a sorely-needed \$6,000,000 expansion of the Central Library. Naturally, Library managers quickly became "sold" on the value of strategic planning.

The Central Library expansion took place in 1990. Since that time thousands of Library users have enjoyed the comfort and efficiency of a well-planned facility that provides adequate parking, a 300-seat Lecture Hall, an increasingly popular café, a Friends' Bookstore, quiet study areas, and other amenities. Without the work that went into that first Development Plan, Library users might still be squeezed into an inadequate building—one about half the size of the remodeled Central Library.

The 1987 Development Plan was based on the planning and measurement tools outlined in two American Library Association manuals, *Planning and Role Setting for Public Libraries* and *Output Measures for Public Libraries*. Subsequent Library Development Plans, produced during 1992 and 1997, continued this practice. Using the standard output measures in all three Plans has allowed the Library to compare long-term progress in reaching our goals.

The 1992 Plan helped pave the way for the construction of a new West Salem Branch Library and spurred the technological improvements that led the Library to offer both in-house and remote access to the Internet. Currently, the Library serves as an Internet Service Provider to about 5,000 subscribers in Marion, Polk, and Yamhill counties. Thousands of public Internet sessions and a wide range of free classes have helped bring Salem into the Information Age.

The passage of property tax reduction measures in the '90s led to major reductions in the Library's services. Since 1990 the Library system has seen staff reduced by 19 FTE, Central Library hours cut by 19 percent, Branch hours reduced by 25 percent, and the implementation of a variety of fees that have negatively affected the public's use of and access to library facilities and services.

These service reductions led Library supporters to rally and work towards the creation of a library district—a taxing entity that would be funded equitably by the population that naturally gravitates toward using the Library's facilities and services. The 1997 Library Development Plan called for the creation of such a district.

Initially, the City of Salem was reluctant to support the district movement. Over time the analysis, goals, and objectives of the 1997 Plan, as well as the encouragement of planning committee members, prompted the City to create a working committee to study the library district concept. Although the district effort has been derailed by temporarily insurmountable political stumbling blocks, the City still supports the district movement, and planning and working committee members still push for a greater Salem-area district.

The 1987 strategic planning effort set in motion a community-based process that continues to this day. Although Library managers regularly turn to the latest Development Plan to track progress toward goals and objectives, perhaps the most important outcome of the planning process has been the creation of a group of citizen supporters who believe in the Library and want to see it develop to adequately serve the needs of the community. The power of the political support that results naturally from the planning process can help any library fulfill its mission of community service. ☐

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Strategic Planning at the Multnomah County Library: The Past as Prologue

by *Jeanne Goodrich*
Deputy Director
Multnomah County Library

Many librarians, by dint of the predilections of their personalities, have a strong curatorial sense. We respect the written word, which implies a respect for history and precedent. We pride ourselves on collection depth as well as breadth, and know that the heart of our librarian's expertise lies with experience and knowledge, qualities that are developed over time. So it is, then, that writing about Multnomah County's current planning effort requires a look back at its previous efforts.

A Brief History of Public Library Planning

The division of the American Library Association that focuses on public libraries, the Public Library Association (PLA), has been working for decades to help local public libraries develop stronger and more responsive services. Many of us who went to library school in the mid-sixties to mid-seventies remember Minimum Standards for Public Library Systems and the formulaic approach (standard for that era) that document took: 2 to 4 books per capita, x user seats per capita, x magazine titles per x thousand population served, and so on. These prescriptions helped us size buildings and justify budget requests, and we were grateful for them.

They did present problems, however. They described minimums, which were often interpreted by funding authorities and library administrators themselves as ceilings rather than floors. Many of us found ourselves in libraries that were continually striving to meet these levels. Somewhere, we were told, there were actually libraries that chafed under these minimums.

They were also strictly quantitative rather than qualitative. This was the same problem school libraries had been dealing with in terms of accreditation issues. A library could own two to four books per capita—but were these the right books for the community? Was the information in the books up to date? Were the books attractive and alluring to potential readers? And, as a Nevada rancher/County Commissioner pointedly challenged me, "Says who?" Where did these numbers come from? What do those pointy-heads in Chicago know about providing library service in rural Nevada?

Library leaders around the country were asking themselves the same questions (well, maybe without the 'pointy-heads' reference). By 1980 a totally new approach had been developed to guide a local library through an entire process that would result in a plan designed to meet the needs of its particular community. As Mary Jo Lynch wrote in the Foreword to *A Planning Process for Public Libraries*, "... most people think of a standard as a rule for sameness. What public librarians need now are not rules for sameness but tools which will help them analyze a situation, set objectives, make decisions and evaluate achievements."¹

*A Planning Process for Public Libraries*² was a tremendous departure. From twenty years down the road, we can easily forget what a revolutionary development this was—and how much harder! The "green peril" (as it was not always affectionately called) suggested that you get out of the library and drive around, looking at your community neighborhood by neighborhood. It gave tips on collecting data about users (ask them to stick pins in a map showing where they lived). It brought librarians into the planning game: sit down, roll up your sleeves, and crunch numbers; roll out planning maps and look at population projections; pay attention to what the guys in police and fire are doing to make their cases for more employees, more facilities, and expanded services. It extolled them to have community meetings and talk to people about what they'd like to see their library provide. The focus on data collection undid many libraries. They exhausted themselves collecting data and never got around to doing the actual plan. Others were so daunted by the data collection aspect of the process that they never started.

This approach was based on the best planning thinking of the time. Up to this point, planning often consisted of the Soviet-style drill of setting targets, projecting future numbers using past numbers, based on the best thinking of the top boss or small group of top managers. The PLA model and other new planning models stressed the differences between this old approach and the new, strategic planning approach.

Strategic planning is well defined by the planners who helped the Los Angeles County Library with its strategic planning effort in the mid-eighties:

Strategic planning is the process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future. This vision of the future state of the organization provides both the direction in which the organization should move and the energy to begin that move. The envisioning process is very different from long-range planning—the simple extrapolation of statistical trends or forecasts—and it is more than attempting to anticipate the future and prepare accordingly. Envisioning involves a belief that aspects of the future can be influenced and changed by what one does now. Properly implemented, the strategic planning process... can help your organization to

do more than plan for the future; it can help the organization to create its future.³

The PLA model and the model Los Angeles County used asked library planners and their communities to look at their organizational values, to develop mission statements, and to look around externally and internally in order to assess their library's strengths and weaknesses, as well as the outside threats and opportunities that would help them or impede them from fulfilling their mission.

PLA planning models continued to evolve and complementary tools, such as output measures, were developed to help libraries create more meaningful measurements of the actual services they provided. A key concept presented in the next model, *Planning and Role-Setting for Public Libraries: A Manual of Operations and Procedures*⁴ was that libraries were stretched too thin. They tried to do everything and be everything that various people in their community wanted. They had no clear focus and often ended up providing a variety of mediocre services rather than several well-defined services.

This model described eight possible roles a public library could undertake in its community. These roles were broadly defined categories of services (such as Popular Materials Center or Preschooler's Door to Learning). Libraries across the country worked with their library boards, staff members, and communities to select the two or three roles that they would concentrate on as they labored to stretch their limited resources.

At the same time, the concept of output measures was also being developed and refined. Ultimately twelve measures were identified and detailed procedures worked out for collecting this data so that results could be compared both within a library and with other comparable libraries. This shift from mere inputs (e.g., two to four books per capita) to output measures, such as whether or not a library user found what he'd come to the library looking for, in-library use of materials, and collection turnover rates (circulation divided by number of holdings), was a major development along the PLA planning road.

By this time the library director's arsenal was bulging with management and planning tools, methodologies, theories, philosophies, and approaches. The library director of the past twenty years has undoubtedly been touched not only by the PLA planning and output measurement approaches, but also by their city's or county's planning activities, if they're part of a larger jurisdiction. She's also read up on excellence, total quality, learning organizations, reinventing and re-engineering, and chaos theory. The modern public library director is as likely to be reading planning and environmental impact documents and the annual reports of the primary businesses in her communities as she is *Library Journal*.

The current stage in the PLA planning process evolution has kept pace with all these emerging management and planning theories. In fact, the PLA ReVision Committee

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appointed in 1996 to revise and update *Planning and Role Setting* concluded that more refinement of the roles idea was needed, that libraries needed to articulate more clearly the difference their presence made to their communities, and that libraries needed more detailed guidance in how to make the hard choices—how to allocate and reallocate their resources—in order to achieve their goals.

The product of this “reversioning” was *Planning for Results: A Public Library Transformation Process*.⁵ The subtitle is important to note: the authors and committee members who developed this process believe that planning following the described model will mean changes, both to the library and to its community. “The best way to assure we have quality libraries well into the future,” they write, “is to continuously reinvent and revitalize them, based on a good understanding of community needs and the ways in which libraries can respond to those needs. *Planning for Results* characterizes this process of ongoing reinvention and revitalization as transformation, a never-ending change in the form, structure, character, and appearance of libraries to assure that they continue to be responsive to the communities they exist to serve.”⁶

A Brief History of Planning at the Multnomah County Library

As the largest public library in Oregon and the oldest public library west of the Mississippi, the Multnomah County Library has had a long and colorful history. The library system, founded in 1864, serves the 650,000 residents of Multnomah County through its Central library and fifteen branches. Thirteen of the branches are in the City of Portland and two are in Gresham. Two additional branches are slated for completion within the next two years: one in the densely populated urban neighborhood of Northwest Portland, and the other in the fast developing Fairview-Columbia Village area of eastern Multnomah County.

The library that was established in 1864 by progressive businessmen was a subscription library and remained such until just after the turn of the century, when enabling legislation was passed to allow for tax support. The library system grew as Portland and Multnomah County grew and became known as a leader, both regionally and nationally. Mary Frances Isom, the iconic director from 1902 to 1920,

was educated at the Pratt Institute Library School. Miss Isom was the visionary designer of the Central Library and developed, with her staff, the modern form of library services in Multnomah County. She even managed to host the American Library Association's annual conference in Portland while the Lewis and Clark Exposition was in progress.

In fact, for many years the only antiquated feature of the library system was its governing structure. The private Library Association of Portland governed well into modern times. It was only on July 1, 1990 that the library became a full-fledged department of Multnomah County government. Despite spending public tax dollars since 1902, the LAP maintained its nineteenth century ways as an exclusive group that made decisions in private, refused to follow public spending and procurement rules, and periodically hobbled its directors and staff.

Increasingly the public questioned this approach to managing a major public institution. Although in the last couple of decades of its existence the LAP modernized to the extent of allowing women and people of color to serve on the Board, it was slow to understand the need to develop and update the neighborhood branches, and to advocate for and spend money on better staff salaries and benefits and facilities maintenance and expansion.

The Multnomah County Library was emblematic of the era of strong, visionary, often female library directors. Mary Frances Isom, Anne Mulheron, Nell Unger, and Mary Phillips guided the library during much of the twentieth century. These were times of building, expansion, the development of a true urban public library system.

Jim Burghardt had the misfortune to be the library director in place when the economic downturn of the early seventies arrived. This time saw the closure of several branches, the establishment of a serial levy as a way to supplement local General Fund support, reductions in hours of service, and a sense of scarcity and insecurity that lasted over twenty five years. Just as rings in a forest tree can show times of drought, infestation and trauma,

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the library's collections and staff Zeitgeist clearly show the scars of this time.

The next library director, Sarah Ann Long, was given the task of modernizing the library system, instituting changes in both operations and thinking. Never an easy or enviable task, her work met with a mixed response from staff and from LAP Board members. During this time, the governance structure of the LAP was brought into sharp question. Numerous white papers, blue ribbon studies and citizens' studies were commissioned to address the economic viability of the library, the appropriate governance structure, and the appropriate organizational form (county department or independent library district).

As part of her mission to modernize the library, Long instituted collecting output measures and using the PLA planning model. Since 1986, the library has been creating long-range plans on a regular basis. *We're Starting a New Chapter*, published in the fall of 1986, was the first wide-scale comprehensive plan ever created for the 122-year-old library system. It built on the six major community studies that had been conducted between 1981 and 1986. A citizen's Long Range Planning Committee, appointed by the Library Association of Portland, provided substantial input into the plan.

This first comprehensive effort used the data and data analysis techniques available at the time, and set out to provide a guide for budgeting and human resource allocation for the years 1987 through 1990. This planning process also included creating a mission statement.

Within only a year and a half, library staff began studying the newly published *Planning and Role Setting* and began what would be a 20-month long series of activities that would culminate in the next three-year plan, *The Next Chapter*. These activities were the most ambitious and most inclusive ever undertaken by the library. Staff groups, community groups, focus groups, and the Friends of the Library selected library roles and developed a library mission statement. Statistical and demographic data was gathered and profiles were written for each library facility and neighborhood. The resources of Portland State University's Center for Population Research and Census were used to better understand the current population's makeup and to develop projections and identify trends.

This plan never made it out of the final draft stage. By the Fall of 1989, Sarah Long had moved on and the LAP was moribund. The community finally made the decision to transition the library to the county, abandoning the "Library Trust" idea (a non-profit corporation which would set policy but observe public meeting and purchasing requirements) which appears as late as the October, 1989 final draft of *The Next Chapter*. The future looked bright, however, and the library incorporated the plan's strategic goals to continue to improve the library's collection of materials, hours of service, children's services, reference services, technology, facilities maintenance and replacement, and general visibility in the community. These goals were incorporated into the levy request put before

the voters in March, 1989. The library rejoiced when they were approved. For the first time in nearly twenty years, branch hours would be extended, new facilities could be contemplated, the materials budget would be increased substantially, and technological advances could be accelerated.

No one knew that this euphoria would turn to despair in eight months' time. Ginnie Cooper became the new library director on April 1, 1990, pleased to be taking charge of a library that had a brand new Gresham branch and a solid budget beginning on July 1. The transition to the county was already well underway, so the next several months were filled with numerous changes and an immediate expansion of services and materials.

The passage of Ballot Measure 5 in November changed everything. Once again, the library system became victim of a funding reduction driven by external forces. The library found itself on a roller coaster of funding crises over the next seven years. Even though available funds swung wildly back and forth so that hours of service changed frequently, materials budgets rose and fell, and staffing levels waxed and waned, lurching progress was made in a number of areas.

The new Midland branch, anticipated by the March, 1989 levy, had been postponed. When it was discovered that seismic activity had shifted the internal terra cotta walls of the Central library, the decision was made to go to the voters for funds for both buildings. It was no longer possible to fund new buildings out of operating funds due to Measure 5's restrictions, so a bond levy was the only reasonable course open to library planners. Turbulent as these times were, the continued discussion of library budget problems and the dramatic structural problems at the Central library (the scaffolding installed to keep falling internal walls from injuring patrons and staff bore striking testimony to the problems) kept the library before the public's consciousness and set the groundwork for the future success of the Library Foundation.

The next serial levy (which provided no enhancement of services) and the building bonds passed in May of 1993. The activities surrounding the Central renovation, in particular, stimulated continued community interest in the library, and the supplementary fund-raising required provided the stimulation for the formation of the Library Foundation in 1995.

Work continued by library supporters to find a more stable source of library funding. A county utility tax was approved as a library funding mechanism by the end of 1992, but new Commissioners withdrew the idea before it was taken to the voters in early 1993. Instead, they proposed that the voters be asked to approve a levy renewal at the current rate and general obligation bonds to renovate Central and replace Midland.

Planning in the Midst of Crisis

The search for a way to fund the library system colored the next planning activity heavily. The previous plan,

while useful, rapidly lost relevancy as the library changed governance and directors, and suffered severe funding whiplash. Short-range planning was the order of the day, not long-range planning, as the library conceived numerous contingency plans in reaction to the events that affected it.

By late 1993 it was clear that another planning activity was required. The funding questions were huge: Where could the library find stable funding? What was the appropriate mix of tax support, funds raised by the library itself (so called entrepreneurial efforts), and focused development activity? Should library users support library services themselves by paying for library cards or other fees? Was the library receiving adequate compensation for the services it provided to people who lived outside its taxing area? Could "basic" services be defined and offered for free, and other services be offered at a price?

The service issues were equally daunting: What were the service priorities? Were they different than they'd been earlier in the decade? What priority should services to children and students have? How should the library continue to develop its technological infrastructure and the services that it would enable?

There was keen political interest in this process. While staff participation had been an important part of the earlier planning efforts, it was minimized this time. Staff and library managers were considered suspect and self-serving, not by library administration or Library Board members but by some county policy makers. Only one staff member was on the Library Planning Committee. A few other library managers served as resource and staff support to the citizen subcommittees that were formed to address issues such as branch development, library services to children and youth, and technology.

This planning process incorporated a few of the methods described in *Planning and Role Setting* but was basically a response to a very local, politically loaded situation. *Focus on the Future* was finished by the end of 1994 and was designed to provide an agenda for library service development from 1995 to 1999.

Again, library planners and managers had no way of knowing that the most turbulent times were yet to come. Surprisingly, considering the hodgepodge of agendas that drove that planning process, the plan proved to be a source of guidance, inspiration and values. When the darkest days of projected branch closures and staff layoffs

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appeared in 1996/97 and 1997/98, the plan was referred to as a document from which service values and priorities could be extrapolated.

Most of the goals of that plan were met:

- Central was renovated and a new Midland branch built. Both were seen as stunning community attributes. Another bond issue in 1996 provided additional funding for branch renovations, replacements, and technology upgrades.
- Information technology was greatly improved. The Automation Plan written in 1995 as a product of the long range plan played a pivotal role in the library's receiving a \$1 million grant from the Meyer Memorial Trust.
- Services to children and youth continued to increase in a variety of ways, from services to child care centers, to reading readiness training for teen parents, to the delivery of books to health clinic and social service waiting rooms.
- Partnerships with schools expanded as WAN to WAN connections were made to schools in all eight districts in the county and the School Corps was established to provide training and tools for students and teachers so they knew how to use library resources.
- Services were developed to expand the library's reach beyond its buildings. The library was an early adopter of internet technologies, provided library customers with telephone and computer-based renewal systems, and worked to make its materials easy to access and request online. CascadeLink provided web-based access to information about community organizations and institutions and provided cutting-edge electronic services such as flood news and election coverage.
- Entrepreneurial opportunities were investigated and implemented when feasible and the Library Foundation was formed and began an ambitious and highly successful program of cultivating and soliciting significant private donations.

Unfortunately, a few goals were not met. Most glaring as a "miss" in this plan was the citizen subcommittee-driven notion that the appropriate branch structure would be one of "tiered" services. The recommended branch development plan contemplated five tiers of service, from the Central library level to small storefront outlets and outreach "mechanisms." Library managers struggled for the next five years to figure out how to do this and never succeeded. That lack of success turned out to be positive since citizens clearly told the library administration and County Commissioners, during the budget meetings that debated branch closures in early 1997, that they didn't want to see any branch closures and that they didn't necessarily think that bigger was better. Based on this community input, the notion of larger, consolidated service outlets and significant differences in services among tiers of branches

has been abandoned.

The search for strong, stable, adequate library funding continues to be a quixotic one. The five-year levy passed in November 1997 provided a breathtaking improvement in funding. Overnight, the Multnomah County Library went from the urban system with the worst hours to nearly the best. Reductions instituted a quarter of a century ago were replaced with convenient, nearly uniform hours at all facilities. For the first time, library materials expenditures were pegged at 15 percent of the operating budget. Staff members with ten years' seniority who had worried about being laid off the year before were astounded as 118 FTEs were added to their ranks. But the fresh breeze of this new era is continuously threatened by new property tax and state General Fund tax limitation measures. The library remains as vulnerable as it ever was. Already it has seen County Commissioners, desperate to fund the needs of the county's neediest residents, take the "surplus" the library had set aside for the increasingly expensive fourth and fifth years of the serial levy to meet pressing current service demands in other county departments. There is no question that new tax cuts or revenue losses that impact other county departments will be felt by the library system.

And, finally, we come to the present.

By late 1998 it was time to begin a new long range planning process. All that had come before set the stage and provided much of the context for the next planning cycle. The Public Library Association had just published *Planning for Results*, so library managers agreed that the Multnomah County Library should be one of the first library systems in the country to use this planning model. The time and the approach seemed right.

This new model built and expanded upon the earlier processes. A fundamental concept was that libraries don't exist simply to give library services. They must truly identify what the local community needs to meet its vision of the future and figure out how the library can assist with this realization. "Libraries need to be involved in a continuous transformation process. They have to change constantly and adjust as their communities change. Our motivation for planning shouldn't be the preservation in amber of a revered institution. We should plan because we want the library to contribute to the success of the community and its people."⁷

Another fundamental concept is exemplified by the authors' differentiation between an older planning metaphor (the road map) and theirs (building and renovating a house). This new metaphor suggests not a round trip but the creation of something entirely new. It also suggests a lot of hard work rather than a more or less carefree vacation.

Armed only with an orientation to the process provided by a PLA preconference and a careful reading of the book and its accompanying how-to manual, the library's senior managers embarked upon the process. Two key factors influenced Multnomah County's approach. The library had already outlined a number of significant service goals

and priorities in the levy package presented to the voters in November of 1997. We knew, for example, that we were going to expand hours, commit to a certain level of materials acquisition, and renovate and build facilities. Much of our technology development had already been accomplished or was well under way.

The second key factor was the decision to build on community analysis and demographics and work internally with staff groups as much as possible, rather than with external community groups or policy makers. The Library Board was involved at key junctures, as a sounding board and reality check rather than as the ultimate shapers of the process. We wanted this plan to reflect our best professional reading of the environment in which we operated. This approach may seem antithetical to the planning model, but upon reflection it makes sense. The Library had been so buffeted by external forces, for so long, that it ached to produce a plan based upon more reflective and considered staff and management input and analysis.

The advances in technology and data analysis tools also shaped the approach taken in this process. A library planning page was put on the staff intranet so that staff could see and use all the background documents, drafts, reports, and other materials related to the process. Substantial research was undertaken to create a “community scan,” a picture of the environment in which the library operates, the demographics, trends, and influences that would impact the library and the demands made upon it.

Considerable effort went into creating the *Library Vision Statement*. This part of the planning model is designed to help library planners determine what the community values and how the library can contribute to meeting community needs. This was not an easy exercise. The desire to describe library needs and visions rather than those of the community it serves is nearly overwhelming. Using the prescribed formula (who will benefit and the benefit and result) is also very difficult. The temptation is to slip back into generalities and feel-good platitudes.

After quite a bit of struggling, library staff and board members came to agreement on the following vision:

**Library Vision Statement
Multnomah County Library**

Multnomah County Library is a great library because:

1. Lifelong learners, from parents of newborns to our eldest citizens, find what they need to satisfy their personal interests and curiosity as well as for formal study—in varied formats that include books, newspapers, magazines, books on tape, videos, CDs, and an increasing selection of online resources.
2. All libraries are modern, well equipped, efficient and a pleasure to use. Each library is an asset to its own unique Multnomah County neighborhood.

3. Library users are able to find the best information to meet their needs, thanks to well trained, service-oriented staff and the availability at all library locations of information in digital, integrated form. Public training is available to help library users navigate the Library’s electronic resources.
4. Serving young children is a high priority and the Library provides a wide array of developmentally appropriate books and other library materials/services to help children learn successfully. Some of these are *Homework Help*, *Books 2 U*, the *KidsPage* and *Outernet* on the Library’s Web site, LIBROS programs targeted to Spanish-speaking children and families, and an extensive summer reading program that attracts many thousands of Multnomah County children.
5. Factual information for educational, business or personal reasons is available quickly via phone, fax or online.
6. Special programs—including concerts, classes, craft/hobby programs, book discussion groups, noted author programs—bring library users of all ages into their library to experience pleasure and meaning from the world of ideas.
7. Multnomah County citizens whose first language is not English feel welcome at their library, thanks to helpful staff and relevant library materials.
8. Citizens who need information about government and public agencies, local organizations or other community services find it easily thanks to information-access tools specially created and maintained by library staff.
9. Those who wish to influence the provision and development of library services in Multnomah County find easily available mechanisms in place to do so. These include community meetings; feedback forms at all library locations; email opportunities on the Library’s Web site; periodic opinion surveys and focus groups; and letters and phone calls to readily accessible library administrators.
10. Multnomah County residents stay well informed about library services and issues, thanks to a variety of communication vehicles. These include consistent coverage by local and statewide media; constantly updated news on the Library’s Web site; *The Bookmark* (mailed to all library cardholder households); Infoline (information and

events distributed in libraries, schools and community gathering places); and a wide array of booklists, brochures, bookmarks, and other print items.

Once the *Vision Statement* was in place the stage had been set for the library to look at its service priorities. Earlier planning models had included eight roles, which were broadly defined categories of service. The new model replaced these with thirteen “service responses,” which describe very distinct ways in which the library serves the public and represent the gathering and deployment of critical resources to produce a specific public benefit. These service responses must address identified community needs and must be specific about what the library does and provides. They must also clearly identify target audiences.

Because the whole point of selecting service responses is to focus resources, libraries are counseled by the planning model to select no more than four. This doesn't mean that a library doesn't offer other services at some level, but rather that it concentrates the majority of its effort in several specific areas.

Again, a large number of meetings were held with various staff groups to get their ideas about the service priorities. Selections were solicited, tallied, and discussed. We selected General Information, Current Topics and Titles, Lifelong Learning, and Information Literacy. We also identified an “overarching service value”: providing our community with buildings that are attractive and bursting with books, services, and activities.

We found that they were made more real to our own situation when we wrote “scenarios” or one-page descriptions of what each service response meant in our own library system. Looking carefully at the array of services and the audiences targeted under each service response also served as a check that these really were priority areas for us. It also allowed us to see gaps in service.

We knew from our research on the county's demographics and population trends, for example, that we were not reaching adults 55 and older as successfully as we reached other age groups and that this was a fast growing segment of our population. We also knew that the Latino population was the county's fastest growing minority population and that this particular group tended to be younger than the rest of the county's population groups. We also found that the small business and solo practitioner/work at home independent sector was large and growing fast. It made sense to us that these would be target audience groups to consider as we continued on with our planning.

From the service responses, we moved to writing goals and objectives. Under this planning model, a goal is defined as “The outcome your community (or a target population within your community) will receive because the library provides programs and services related to a specific service response.” Again, the emphasis is definitely on community

needs and how the library can help meet these needs, rather than on the library's needs or sense of doing more of what it has always done.

An objective is “The way the library will measure its progress toward reaching a goal.” In other words, objectives under this planning model are measurements, either of people served or how well a particular service met the needs of the people being served.

How does this look? An example of a goal under the Business and Career Information service response could be: “Workers in Anytown will have the skills they need to be employed locally and make a living wage.” This goal clearly identifies the target population (workers in Anytown) and the outcome they'll receive (skills to find living wage jobs locally).

The objectives are designed to be meaningful, credible measurements, not just counts of activities that have little meaning for people who have no context or experience using them.

In the yet unpublished *Concise Planning for Results*, library trainer and consultant Sandra Nelson asks which measurement people in your town would find most meaningful: “The library answered 135,000 reference questions last year” or “Seventy-nine percent of the business people in Anytown who used the library's electronic business service said that the service met their need for quick, accurate information.”

Once again, following the prescribed formulae for writing goals and objectives can be a challenge for managers and staff members. It's a challenge worth pursuing, however, because it forces the writers to think constantly about the ultimate outcome of the library service. Too often we just do things, pretty much as we've always done them, without thinking critically about the impact they have.

The final step in the planning process is to identify activities that could be undertaken to implement the plan. Activities are defined as “strategies or groupings of specific actions that the library will carry out to achieve goals and objectives.” This is the step where staff usually becomes very engaged because now something is about to happen.

As libraries evaluate the possible activities before them, they have to ask themselves which of the possible activities are most likely to result in accomplishing the outcomes described in the goals and objectives, and whether or not they have the necessary resources to accomplish a particular activity.

Here another important concept comes into play: the difference between effectiveness and efficiency. Effectiveness is doing the right thing, while efficiency is doing things right. As libraries evaluate the possible activities before them, they have to ask themselves which of the possible activities are most likely to result in accomplishing the outcomes described in the goals and objectives, and whether or not they have the necessary resources to accomplish a particular activity.

The first step is to look at which activities will really move the library in the direction of meeting their goals. Once these are identified, the resources necessary to carry them out have to be analyzed. Resources include staff and staff expertise, library materials, space (buildings and furniture), and technology.

Here's where the rubber meets the road and where even more work is required. Using the earlier Role Setting planning model, over 90 percent of the public libraries in this country identified roles. However, fewer than a third actually made substantive changes in how they allocated their budgets so that they could concentrate on those roles. The resource allocation piece of Planning for Results was deemed to be so important that another book devoted to it was developed by PLA.

*Managing for Results*⁸ was published earlier this year, and provides a detailed discussion of the issues relating to resource allocation, as well as 56 workforms with detailed instructions on how to use them to collect and analyze data.

The Multnomah County Library is at the point of finalizing goals, objectives, and activities. This work is being done by a number of managers and staff groups throughout the system. Responsibility for implementing the plan is now dispersed throughout the organization. It is a much more organic process than has ever been used before, but seems to make sense since so many staff members were involved in various stages of the planning process. Over 75 meetings were held with various library employee groups (usually piggybacking on other meetings), with over 1500 employees reached (some several times) at these meetings. Senior managers were gratified to report that staff at all levels were aware of the basic elements of the planning process, and of the priorities that had emerged. They were ready, then, when they were called upon to help draft goals, objectives, and activities.

The new five-year plan, to cover FY 2001-2006, is titled *Extending the Promise*. The brochure and Internet site that will be created to communicate the plan to the public will carry several messages:

This is still the library you've known and loved for so many years.

We are aware of how our community is changing and we will be extending our services beyond both our walls and our traditional user groups.

We value both the printed word and providing the latest information technology.

We know that libraries are important community institutions which contribute to each neighborhood's sense of identity and uniqueness.

We hope to have our brochure and public planning site available by the end of September or early October.

All of the background information and steps of our planning process are available on the Web site we've established to share this information: <http://www.multnomah.lib.or.us/lib/products/tlp/>. Feel free to take a look and let us know if you have any comments or suggestions. Our plan is to make the public Internet site interactive so we can continue to update the plan and information about our community as we proceed through the next five years. ☐

¹ Mary Jo Lynch, Foreword to *A Planning Process for Public Libraries* (Chicago: American Library Association, 1980): xii.

² Vernon E. Palmour, Marcia C. Bellassai, and Nancy V. DeWath, *A Planning Process for Public Libraries* (Chicago: American Library Association, 1980).

³ J. William Pfeiffer, Leonard D. Goodstein, and Timothy M. Nolan, *Understanding Applied Strategic Planning: A Manager's Guide* (San Diego: University Associates, Inc., 1985): 2.

⁴ Charles R. McClure, Amy Own, and others, *Planning and Role-Setting for Public Libraries: A Manual of Operations and Procedures* (Chicago: American Library Association, 1987).

⁵ Ethel Himmel and William James Wilson, *Planning for Results: A Public Library Transformation Process* (Chicago: American Library Association, 1998).

⁶ Himmel and Wilson, 4.

⁷ Himmel and Wilson, 4.

⁸ Sandra Nelson, Ellen Altman, and Diane Mayo, *Managing for Results: Effective Resource Allocation for Public Libraries* (Chicago: American Library Association, 2000).

Technology Planning: Oregon State University's Information Commons

by *Richard Griffin*
Head of Library Technology
Oregon State University

The centerpiece of Oregon State University's newly expanded and renovated Valley Library includes a large public computing facility, the Information Commons. From the beginning, the Information Commons was to be more than just another "student computer lab," with a strong emphasis on offering a facility for library users to access information in electronic format in the same location as library reference services. Word processing and other software applications were to be offered only on a limited number of machines. An implementation group studied patterns of student computer use elsewhere and, in a report written in March of 1998, made recommendations about the configuration of the new facility. Mostly due to budgetary limitations, some of the recommended features did not materialize, but the general nature of the facility remains true to the original intent.

Hardware

The original report called for a mix of computers: approximately 30 percent would include library software, productivity software and Internet access; 50 percent would be limited to Internet and library database access; and the remaining 20 percent would be used for email access or specialized multimedia applications. In all likelihood, the mix will remain in these proportions after the library installs 50 more thin-client SunRay workstations this summer. The "specialized multimedia applications" never materialized due to support issues, but at the end of this summer the library will have 74 Internet access machines, 53 computers with Internet access and Microsoft Office and a small number for Internet access and email (email is not necessarily available on other machines—see discussion below). In addition there is a single workstation with special adaptive technology hardware and software to enable computer use by people with disabilities.

The Library has added new computers several times during the short life of the Commons, mostly in batches of 40 to 50 machines, and there is now an interesting mix of hardware, the age and relative computing power of which somewhat dictates its use.

The very oldest machines are nearly eight years old. In the computer world, that qualifies them as museum pieces!

They are running Kermit to access the text version of the library catalog or the antiquated Pine email that is still offered to students as an email system. The library uses Kermit for the telnet connection because few students are old enough to remember when everyone used it as the de facto standard, so they do not know how to tamper with it as easily as they would with newer software. All of these machines are due for replacement in a few weeks' time.

A substantial number of relatively slow Pentium computers purchased from Tangent Computers when the Commons opened are used to run only Netscape, either in kiosk mode with access only to the web-based library catalog, or to connect to the Web. Although they are Pentium machines, they are slow enough that they are unable to run Microsoft Office very effectively—a controversial issue, since they have floppy disk drives and the thin-client workstations do not.

Our newest conventional desktop computers are Tangent Pentium 350s and are in high demand because they have Microsoft Office *and* disk drives.

Thin Clients

The library's latest acquisition for the Commons, and for placement throughout the library, is 95 thin client workstations. Thin clients are actually sophisticated dumb terminals. They have enough internal intelligence to find and connect to a server and display whatever the server sends to them all the real work is done entirely by the server, which can be located almost anywhere. At OSU, forty-five of these are NCD workstations connected to a Windows 2000 server. The NCD clients have a built-in Windows CE operating system the same as that used by some brands of Palm Pilot-type devices. They have no moving parts or disk drives. These are supported by two servers running Windows 2000 Terminal Services. Some of these client workstation offer Microsoft Office, while others are limited to Web access. The other 50 thin clients are Sun Computers' SunRay stations connected to a Sun Enterprise 250 server, running Sun's Unix (Solaris) operating system. Their purchase was made possible by a generous grant from Sun Computers. These eye-catching workstations will offer Netscape access only, since Unix-based Netscape is almost identical to Netscape for Windows.

There are several advantages to using thin clients in a public access setting:

- The workstations are relatively inexpensive (\$400 to \$500 each) and have a much longer useful life expectancy than a conventional workstation.
- Since all the true work is done by the server, thin clients can apparently run almost any application.
- As new applications are developed, the thin clients can still be used although the server may need to be replaced. Replacing one or two servers is gener-

ally less expensive than replacing 45 conventional workstations.

- Updating the software on the server effectively replaces the software on all the workstations simultaneously, so management is much simpler and cheaper.
- All client workstations are identical, so if one fails, an unlikely event since there are no moving parts, it can be switched with another one and the new one needs no configuration or software.

Unfortunately, the lack of disk drives is also a disadvantage, since many users still like to take their data with them on a floppy disk. The library does not offer storage on the thin client server, but remote storage is available on those machines which offer Microsoft Office and require the users to login to an applications server. Nevertheless, the lack of floppy drives has made the thin clients less popular with users than the conventional machines. Recent technical developments suggest, however, that local floppy drives will be available for thin client workstations in the near future.

Security

Various security issues have arisen since the Commons opened in 1999. Theft or tampering with equipment in the Commons has not been a major problem, as the computers are all locked down with a security cable, and we have maintained software security with Fortres 101 software from Fortres Grand Corporation. However, one rather vexing security issue is anonymous email. There were several unpleasant incidents including an emailed bomb threat to campus security, culminating in the confiscation by the police of a disk drive as evidence.

Although workstations offering applications such as MS Office require an authenticated login, the Internet access machines do not. Librarians felt that the library should offer access to electronic information on the Web to anyone who comes in, without the requirement for identification. Unfortunately, a small number of people abused this open access by setting up anonymous email accounts through sites such as hotmail.com and sending offensive or threatening messages. When these messages were traced back to computers in the Commons, we came under increasing pressure from network administrators to require a login ID for all machines. The library, however, found a simple, but effective, alternative. No login ID is required on Internet access computers, but access to free email services is blocked using a hosts file to redirect the addresses of all the free mail services which could be found (over 800 by now) to a local server describing student email services. OSU students and staff can still access their OSU email account on any machine and free mail service, such as Hotmail, can be accessed from any machine which requires a login. A few machines can still be used by non-OSU users for access to free mail but these users must first present an ID. Since we removed the users' anonymity, we have not had any complaints of abusive email.

A similar security issue made possible by anonymous access to machines has also been resolved. Network Services received complaints of abusive language being used in a chat room for school teachers and the source was traced to someone using a library computer which not requiring a login. The Library has now supplied Network Services with the IP addresses of all machines which do not require logins, and Network Services is now able to block access to certain sites from these machines if they receive complaints from the administrators of those sites. Only one site has requested this so far.

Managing Access

To offer better accessibility to a limited number of computers, the staff of the Information Commons has experimented with various ways of assigning users to specific computers for a set length of time. This process is done only for computers where a login is required. In cooperation with the managers of several other computer labs on campus, the library considered using a very sophisticated program, Lab Manager, which was developed by the University of Texas at Austin. Among other features, it offered a graphical representation on the Web of available computers; it automatically limited users to a preset time limit; and had a waiting list function. Unfortunately it was not possible to implement it satisfactorily in the OSU environment. For a short time, staff placed names on a written list after checking for a university ID. This was replaced by a locally developed online system and then later by the library's Innovative Interfaces circulation system. A token with a barcode and a computer number was checked out to users for a two hour loan period, and only people with the appropriate token were supposed to use the associated computer. This method worked reasonably well.

The whole checkout process was time consuming and has recently come into question as the library added more workstations and substantially improved workstation availability. Accordingly, it was recently decided to discontinue the need to check out computers. It remains to be seen how well this will work when most of the students return in the fall, but the librarians are hopeful that most users will find a workstation fairly quickly when they need it.

Now that our student staff no longer need to remain at the counter to check out computers, they are more available to assist users with computer questions and to walk around the facility to check that all the machines are working as they should. It should be noted, however, that, unlike a regular student computer lab, it was never intended that complex computer questions would be answered at the assistance desk. Anything questions that go beyond basic assistance with the workstations are handled by telephone by the University's computer assistance desk. The Commons' technical assistance desk and the library reference desk are adjacent to each other and work closely together, complementing each other's services. ☐



The Information Commons in OSU's Valley Library.



The stylish SunRay thin client from Sun Computers.



The Windows 2000 thin client.

Planning Amid a Multitude of Projects: A Consortial Perspective

by *John F. Helmer*
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Amid a multitude of projects, no plan is devised.
PUBLIUS SYRUS, MAXIM 319

“Planning” is often treated as if it were a process synonymous with predicting the future. When viewed this way, planners can find themselves uncomfortably cast in the role of futurist or venture capitalist. Librarians engaged in planning activities may feel that they are expected to predict the future of information technology and publishing in order to plan for library services and collections. If this is your view of planning, then it may be tempting to observe the pace of change in these fields and (even more daunting) the hype concerning new technologies and conclude that planning is futile. We are all swamped by a multitude of projects and subject to a dizzying array of factors outside our control. How can we possibly predict what new technologies will emerge and which .com’s will have an impact on library services?

Rather than emphasizing prediction, perhaps a more useful approach is to view planning as a continual process aimed at:

- Evaluating services.
- Supporting successful services.
- Revising or discontinuing unsuccessful services.
- Launching new initiatives.
- Creating a flexible organization and culture.
- Encouraging experimentation.
- Reinforcing the values and purpose of the library within its larger context.

In other words, planning need not be so much the act of devising long range predictions as it is a continuous process of feedback and analysis, an ability to take action relatively quickly, and a willingness to evolve and try something new.

Library Consortia

Although these factors apply to library consortia equally well, such collective enterprises face an additional challenge as they attempt to weigh the divergent needs and cultures of their member libraries.

Consortia do not exist in a vacuum. Those that succeed are attuned to the needs of their member libraries—libraries that are, in turn, attuned to the broader context of the college, university, school, city, or company they serve. In other words, successful consortia exist to further the mission of their member institutions. While this relationship between the consortium and its membership may sound obvious, in practice planning services for a diverse group is no simple task.

Depending on the consortium, member libraries may serve a tremendous variety of constituencies. Statewide projects often serve every non-profit library in the state and thus include public libraries, universities and colleges, school libraries, and special libraries. Even among a fairly homogeneous academic consortium such as Orbis, one quickly discovers important differences that stem from institution size, public and private funding, two-year and four-year programs, location in a metro or rural area, location in Oregon or Washington, extent of graduate programs offered, curriculum supported, and differences in institutional culture and approach to management.

Consortia typically deal with disparate memberships in one of two ways: they become skilled at understanding their membership and building flexible services, or they become dictatorial and offer services on a one-size-fits-all basis. The consortia that most often thrive under autocracy are those with a government mandate and a large pool of central funds to disperse. Many libraries are willing to put up with an autocratic consortium if the economic benefit of membership is large. In contrast, when libraries commit institutional funds to participate in a consortium they are far more likely to expect their consortium to make wise use of funds, engage in businesslike practices, and behave in a responsive and flexible manner. This contrast illustrates a familiar expression: “There is a world of difference between paying and being paid.”

I will not dwell on the autocratic approach but rather address some of the factors that inform the planning process for consortial projects that are attuned to member needs and interests.

Communication

Consortia often survey their membership to determine the extent of common interest in a particular project or product. Although surveying may seem to be a fairly straightforward planning technique, there is perhaps nothing quite like working on a consortial project to reveal a variety of philosophies and priorities within a single member institution. It is not unusual to find differences between directors and staff, technical and public service personnel, or the “main library” and its various branches or semi-independent parts.

While this is to be expected, it is important for the consortium to structure the planning process in a way that will draw out the diversity of input present in its membership. Approaches to addressing the challenge of collecting member library opinion include:

- Offering summaries of committee work on a consortium Web site that is available to all staff at member libraries.
- Supporting open access to topical consortium email lists. Such lists should encourage broad subscription beyond committee membership.
- Educating committee members to see themselves as spokespersons for their institution. The consortium needs more than their input as an individual or representative of a piece of their institution. In some cases, this expectation requires cross-divisional discussion that may not normally occur within the member institution.
- Encouraging discussions that seek analysis and input from line and management staff but also make clear where final decisions will be made. It is important that the values and conclusions of each group are summarized and made widely available to the consortium membership.

Minimizing Requirements and Maximizing Choice

It is critical that consortia not overstate the universal requirements for membership. This can be a difficult balancing act since some services gain their efficacy from consistency. The consortium should only impose such sweeping requirements where the payoff is large and the cost of consistency minimal.

Orbis Borrowing, the Orbis Library Consortium's patron-initiated borrowing system, is an interesting example of a service that imposes a very stringent requirement but also allows for great autonomy among member libraries. For this consortium, participation in Orbis Borrowing is synonymous with membership: all Orbis member libraries must participate in Orbis Borrowing if they are to be an Orbis member. The Orbis Borrowing system is based on "INN-Reach" software developed by Innovative Interfaces Inc. (III). Unfortunately, given present technical limitations and the high cost of including catalogs based on non-III software, requiring participation in Orbis Borrowing is tantamount to requiring that every member library use III software for its local catalog. All things being equal, the requirement of consistency in local OPAC vendor is clearly undesirable because it sets a very high bar for participation in the consortium.

Although such a steep and universal requirement is generally undesirable, in this case it has worked well for the consortium because the INN-Reach system is unusually robust and successful. Somewhat paradoxically, although INN-Reach requires consistency in catalog software it also allows for a great deal of autonomy among the member libraries. Member libraries are able to participate in a powerful resource-sharing system while retaining nearly complete control over the coding of bibliographic records, public interface, financial functions, patron records, and other aspects of their local system.

In short, the choice to "opt in/opt out" is generally preferable but, when the benefit is large and the cost manageable, consortia should be prepared to impose some expectations on all members.

Flexibility

It is a bad plan that admits of no modification.

PUBLIUS SYRUS, MAXIM 469

Flexibility is perhaps the overriding watchword of planning for library consortia. Every member library is different so, in addition to offering new services on an "opt in/opt out" basis, it is often wise to approach planning with an intent to accommodate a variety of implementation timelines and institutional definitions of the fiscal year. Whenever possible, each participating library should have the freedom to customize its implementation of a new service. Most libraries will want to incorporate a new service in a manner that is consistent with present services rather than according to a consortium-imposed standard.

Building a Consortial Culture

Key to the success of any library consortium is the willingness of member libraries to represent their needs and convey their differences while simultaneously developing an understanding of the values, needs, and limitations of other member libraries. It is especially important that members of the consortium's governing body choose to adopt the "consortium perspective." In other words, members of the governing board will often need to weigh what is good for the consortium as a whole against what is best or ideal for their own institution.

Ideally, consortia should also be prepared to take a few risks, try something new, and be prepared to learn from failures as well as successes.

Businesslike Operation

Although a consortium can be an ideal venue for sharing information and coming to understand and appreciate the challenges faced by other member libraries, consortia need to behave in a calculated and businesslike fashion as well. In many cases the consortium must take a calculated approach to weighing the costs and benefits of new projects and services.

The calculation of cost is perhaps most often under-emphasized when new consortial projects are envisioned. By their nature, collaborative organizations can impose a significant overhead in terms of the time required to reach a decision or achieve buy-in from participants. Too often we see consortia engage in an activity with an enthusiastic sense of the benefits but with an incomplete understanding of total costs. Economists call such costs "externalities," costs that are external to the calculation of cost, benefit, and optimal organization. For example, if committee time and the central costs of invoicing and paying a vendor are excluded from the calculation, it may appear that group licensing of a particular electronic resource makes

See Planning Amid a Multitude of Projects page 21

Planning for the Worst: When Disaster Strikes

by Faye A. Chadwell
Head of Collection Development
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What are the odds that any one of us will face a fire, earthquake, or some significant disaster in our professional careers or even our lifetimes? The odds that we will encounter serious injury or death as a result of some disaster are long, to say the least. According to one source, we have a greater chance of being injured by our toilet bowl cleanser (one in 10,000) than we do of being killed by a tornado in a given year (1 in two million). Despite such odds, we can lay a hefty wager that the librarians who faced disasters like the 1989 earthquake which destroyed the California State University at Northridge library, or the floods which wreaked havoc on the Colorado State University collection, would urge us all to take necessary precautions. Just because most of us will never endure the aftermath of a natural disaster does not mean we should take the old adage, "an ounce of prevention is worth a pound of cure," lightly.

Although I have lived in regions of this country that have suffered from the impact of hurricanes, floods, tornadoes, and earthquakes, the libraries in which I worked never experienced any damage from natural disasters. The damage I have witnessed has mostly been the result of human error, especially error in taking proper preventative measures. At the University of Oregon in the late spring of 1999, contractors hired to repair perpetual leaks in the Science Library, an underground collection, might have been lulled into a sense of false security by the bright blue skies of summer. When our usually ubiquitous Northwest precipitation returned, the rain caused flooding that unfortunately damaged some expensive science journals and other materials.

For the past year, the University of Oregon Library has been working on a disaster response plan. Our project developed as a result of efforts within the university to establish a campus-wide plan. The Science Library flood was a wake-up call, but it did not precipitate the planning process. While the library's plan is not finished, we have completed a solid first draft. Our work must continue, but this draft will provide ample assistance in the event of an emergency.

During the planning process, one of our most valuable discoveries was the knowledge that there was no need to reinvent the wheel when developing a library disaster plan. In fact, our biggest challenge was combing through the vast amounts of available literature.

This multitude of accessible resources includes disaster-planning workbooks which allow librarians to simply fill in the blanks and, "Presto, instant disaster plan." One such printed source is the *Disaster Plan Workbook*, published by the Preservation Committee of the New York University Libraries 1984. The *Soaring to Excellence* program, part of a teleconference series for library professionals produced under the auspices of the College of DuPage in Illinois, also makes such a plan available at this site: <http://www.dupage.edu/soaring/disasterplan.html>. After going to this site, librarians can seek permission to copy the plan, and then proceed to fill in the blanks. A helpful series of publications is also available from the Northeast Document Conservation Center at this Web site: <http://www.nedcc.org/plam3/index3.htm>. The NEDCC makes its *Emergency Management Technical Leaflets* available for free as a reference tool for disaster planning and recovery.

As an academic library, we wanted to consult the completed plans of several university libraries. With their permission we also borrowed material from their plans. Most authors or compilers are very collaborative and willing to share their expertise. Since many libraries have mounted their plans on the Web, we made good use of these resources; two well-developed plans are from Indiana University (<http://www.indiana.edu/~libpres/plan/disaster.html>) and Tennessee Technological University (http://www2.tntech.edu/library/web_guides/displan.HTML). The one public library plan located on the Web belongs to the Beaufort County (South Carolina) Public Library: <http://www.co.beaufort.sc.us/library/Beaufort/emergency.htm>.

The University's Draft Plan

The University of Oregon Library's disaster plan includes the basic components found in similar documents:

Contacts for Types of Emergencies

A list of contacts for likely emergencies will help the library locate individuals or groups best suited to respond to a particular type of disaster. In some cases, these contacts may provide information or referral to another agency, rather than direct assistance. The list should be relevant to the area. For example, a library in southeastern Florida would want to include someone with knowledge of hurricanes and proper evacuation processes.

Members of the Disaster Response Team and Their Responsibilities

For many libraries, it will take the entire staff to put together a disaster response team. Some staff members may have to wear two hats at once. The team should be responsible for the following activities: coordinating and managing the library's response to the disaster; assessing damage to materials and equipment; recording

the damage, usually through photography; communicating appropriate news to library users, the campus or community, the media, and the profession at large; coordinating the transportation of materials and supplies and associated relocation activities; allocating and authorizing expenditures and use of staff resources; supervising volunteers or workers during the salvage phase; and designating priorities for salvage based on written guidelines and damage assessment.

Prevention/Protection Checklist

A prevention/protection checklist like the one available from Indiana University allows librarians to analyze potential risks to the staff, facilities, and collections, and to inspect areas to discover sources of possible catastrophes, such as poorly-ventilated rooms, flammable liquids, or leaks.

Building and Collection Contacts

Some libraries' holdings are spread across several buildings, or even districts. There may also be diverse collections throughout one building. A disaster plan should identify the relevant people to phone, especially in cases where the collection is not "officially" maintained by the library, or is in a building the library shares with another unit.

Priorities of Collection Salvage

What do I save first in a fire? *The Gutenberg Bible* or the *Meriwether Lewis Memoirs*? The answer is, "Neither." Evacuate the building first. Once it is safe to return, the established priorities will provide a guideline for what to salvage first. Here are some questions to ask when determining priorities:

- Is the item of local or regional importance?
- Can the item be replaced?
- What is the replacement cost?
- Is this cost affordable?
- Would replacing the item cost more or less than restoring it?
- What will insurance pay for—replacement or restoration?
- How important is the item to the collection or to researchers/users?

Building or Floor Plans

All staff and volunteers, in addition to members of rescue crews, fire fighting units and the police, should have access to the layout of the building. Staff and others should be able to quickly locate all fire extinguishers and alarms. Building plans should clearly label fire exits and alternate escape routes, and staff should become familiar with them.

List of Onsite and Offsite Supplies

Listing supplies allows librarians to identify necessary items for responding to various disasters and to estimate the costs for creating disaster kits from scratch. Almost all of the disaster planning guides that we examined recommended creating supply kits in advance and locating these in more than one place and/or within each branch for larger library systems. Most disaster planning guides also encourage librarians to locate supply kits offsite in case librarians are unable to gain access to the kits held within their library buildings.

Directory of Suppliers and Consultants

A list of suppliers and consultants provides easy reference to the company that can rent dehumidifiers or to the consultant who can explain what is necessary to salvage rare photographs.

Recovery Process for Library Materials, Furnishings and Artwork, and Computers

Not every library has the resources to create and maintain a Preservation Department like Harvard or Stanford. However, most of us can take advantage of these libraries' great resources to learn and plan how to salvage materials. For information on salvage methods for paper-based materials damaged by water, fire, insects, mold, etc., try this URL: <http://preserve.harvard.edu/procedures/salvage.html>. For information on salvaging other types of media, in addition to paper based materials, see the website for the American Institute for Conservation of Historic and Artistic Works that Stanford University sponsors: <http://aic.stanford.edu/>

Training, Prevention, and Review of Plan

All staff and volunteers should read and have access to the disaster plan. Training in disaster recovery techniques should be available to all staff members and mandatory reading for those individuals serving on your response team. Oregon groups addressing the broader issues of preservation could also offer some assistance or referrals regarding training and preparedness. Consult members of either the Oregon Library Association's Technical Services Round Table: <http://olaweb.org/org/tsrt.shtml> or the Orbis Preservation Committee: <http://libweb.uoregon.edu/orbis/OPC.html>. Both occasionally sponsor local and regional preservation workshops and presentations.

The goal of a disaster preparedness plan is to lessen the loss of, or damage to, library materials and other materials in the event that a disaster occurs. Prevention remains the biggest protection against sustaining significant damages. We cannot plan for every conceivable emergency, but by planning and orchestrating a careful, measured response, we can help our library staff be prepared to act quickly and efficiently in the event one occurs. ☐

Planning Your New Library Building

by *Gary Jensen*
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This checklist is based upon my experience in helping to plan a new library building at Western Oregon University. It is anecdotal, and I make no claim that it is comprehensive. However, it may help those of you who find yourselves involved in planning your own new building or remodeling project.

Many librarians never have the experience of planning a new library building or the remodel of an existing facility. For those who do, however, it can be an exciting but often intimidating process. As facility planners, Librarians find themselves thrust into a variety of situations for which they may have no formal training or expertise. Not only may they need to learn about construction processes and language, they may also have to develop their skills as fund-raisers.

Most library schools do not teach courses in these areas. Librarians who work for institutions that employ fund-raisers and physical facility planners are fortunate, because they can rely on fund-raising experience and technical building expertise of those individuals. However, there is no substitute for learning the “lingo” of the architectural profession and the building trades. Your ability to understand what is being said and proposed will be directly related to the success of the design effort.

Most librarians will need to do some reading on the topic and consult resources on the library planning process. Depending upon whether you work in a public, school, academic, or special library, there are guides to the process. The Building and Equipment Section of ALA's Library Administration and Management Association has published a number of useful volumes, and also sponsors relevant sessions at ALA conferences. There are also a number of useful articles in the library literature. A note of caution, however: many of those accounts relate the specific experiences of the author in a given library, and those experiences may be so different from your own situation to be of little or no use. Each building project involves unique funding situations, administrative oversight, patron communities, architects, interior designers, and contractors. The transferability of experiential information to your project may be limited.

Pre-planning

Even if a building project seems unlikely or far in the future, it is a good idea to establish a record of needs. Inevitably, there are things that are not right about your current building. Perhaps the building design was faulty to begin with. Perhaps you have outgrown your location. Maybe your building does not allow you to make the number of electrical and data connections that you need, or perhaps your building does not meet code requirements. If you work in an academic library, you may be prompted to plan by outside assessments such as those done by the general and specialized accrediting bodies. Over time you should document the inadequacies of your space. You should also engage in forecasting your need for services and space. Plan for growth in population served, or for expansion of resources and services. Share your notes with your staff and place copies in a handy file for future reference. You may find it helpful to subdivide the file by topic: fund-raising, selection of architects and designers, standards, space issues, etc.

Planning Phase

When you get serious about planning a new building, one of the first things to do is determine what the latest



Exterior of the new Wayne and Lynn Hamersly Library at Western Oregon University.

standards are for your type of library. Academic librarians can turn to the standards for college or university libraries issued by the Association of College and Research Libraries. Although many standards have been quantitative, the recent trend is to express the standards in terms of quality and outcomes. While these new standards are helpful in general, they are less convenient than the older standards for planning physical space since they do not rely on numbers and ratios. For example, the older ACRL standard specifies that there should be sufficient seats for readers to accommodate one in five students on a commuter campus. The problem with such numbers is that they are not necessarily valid, and they may be of little help to your library. The new standards do not rely solely upon numeric measures.

Talk to others

One of the best sources of information about planning library buildings is talking to your colleagues who have planned and built or remodeled libraries, especially if their projects have been recent. Although you should be sure to talk to colleagues who work in libraries similar to yours, do not overlook the benefits of talking with library staff in other kinds of libraries. In many cases, the issues and concerns are the same, and you may learn of a solution from another kind of library that can be adapted to your needs and situation.

Ask your colleagues how they started the planning process, how they developed the justification for the project, what their planning issues were, how they convinced their administrators or boards as well as members of their library communities, how they used standards and accreditation reports to make their case, how they raised funds, how they selected their library consultants and architects, how they developed the design, what their greatest challenges were in the process, and how satisfied they were with the results.

Talk to your users

Planning efforts are usually more successful if you have collected recent and reliable information about your users' needs and concerns. While you may think that your patrons want more periodicals, they may rate the need for more computer terminals as a higher priority. A word of caution, however: user feedback can vary. It can be contradictory, unreliable, or uncharacteristic of the majority of your users. If you use surveys, be sure that they are carefully constructed according to best survey practice, and that the information derived is reliable. If you don't have survey experience, seek out someone who does and ask them to review your survey techniques and questions.

If you have a library advisory board, faculty library committee, Friends group, or other appropriate group, ask them for advice and comment. Suggestion forms, both paper based and online, can be another important way to gain knowledge about patron concerns.

Even if you have reliable patron data, don't abandon your own professional judgment and your knowledge of your own budgetary circumstances. You and your staff members

should be working from your own "wish list" of desired improvements.

Visit other libraries

If you are a visual learner, you may find it helpful to visit other recently-constructed or remodeled libraries. Pay attention to the relationships of spaces for various activities, collections, and services. Watch how patrons use the spaces, including aisles, stairways, and elevators. Take notes on what works and what does not. One of the challenges of any building or remodeling project is to avoid the mistakes made in other projects. Taking pictures to review later, especially with other staff members, can be a very effective way to communicate good as well as bad building design practices.

Prepare the justification

Justifying your new building or remodel project may be a challenge. The decision-makers who will approve or deny your proposal may have opinions and make assumptions about the need for a new or remodeled library. In particular, you may be confronted with suggestions that libraries are no longer needed because everything is now online. Dealing with such attitudes takes diplomacy and tact. Remember that you are dealing with a non-librarian audience. Document the need for an expanded library as well as the need for technology.

Hire a library building consultant

If neither you nor any of your staff members have ever been involved in a building project, you may want to consider hiring a library building consultant. A note of caution: consultants vary in their styles, techniques, abilities to communicate, and expertise. Ask for references and check them all out. Your comfort level with the individual or firm selected will be critical in the initial planning stages.

Appoint a library design committee

Be sure to include representatives from all of the staff categories in your library. It is particularly important to get input from paraprofessional staff members. Appoint people who are creative and flexible, and who will likely be around for the entire planning, design, and building process. Add representatives to the committee from user groups if appropriate. A design committee should be small enough in number to facilitate meeting and efficient use of time, but large enough to provide a wide range of ideas and opinions.

Carefully interview architects

Establish a strong interview team with representatives from the library, your institution's or organization's physical facilities staff, and administrators. Interviews for architectural services should consist of rigorous questions and follow-up. Make sure you know who will be working on your project. In particular, ask whether senior-level architects or rookies (or a combination) will be assigned to your job. Ask what technical resources are used by the firm. Do they have someone on staff who can do CAD work? Ask what services will be included in your contract and which will not. Determine whether they are a good match for your organization, environment, budget, and circumstances.

Don't just take the low bidder. Ask how often they plan to be on site. This is particularly important when you hire an architect from out-of-state, or from a city some distance from your location. Call as many references as you can, including those you know of but that are not cited by the applicants. Visit the buildings they have designed and ask the staff questions. Take pictures and share them with your own staff members.

Be particularly vigilant about architects who want to design "signature" buildings. Such buildings may be dramatic or controversial and contribute to an architect's reputation, but will probably do little to meet your needs.

After the selection of an architect, make sure that you do your part to maintain good communication. Do not assume anything, especially if the architects have never built a library before. Even if they have, the kind of library they built and their experience may not be very relevant to your project. Make sure that the architects understand your priorities, concerns, and needs. Put them in writing to ensure that they are not ignored.

Your relationship with your architects is crucial to the success of your project. In the end, you have to trust them to deliver a high-quality building or remodel project.

Focus on function

The shape your design takes should be related to the functions you must fulfill. Good architects will listen carefully to your list of major functions and responsibilities and your descriptions of activities. Be sure you indicate the relevant importance of each element of your operations. As the design begins to develop, review it critically for its correspondence to your functional needs.

Designing libraries to meet developing technological standards is a difficult process. Aim for the maximum flexibility and avoid basing your design on outmoded technologies.

Question, question, question

If you do not understand at any point in the design discussions, ask questions until you do. If it doesn't sound right to you, it probably isn't right. Trust your instincts about libraries and library services. Ask for clarification, and, better yet, ask the architects to draw you a picture. A high-quality architectural firm ought to have someone on the staff who can draw! Insist on hearing what all of your options are. Computer-drawn (CAD) images are an excellent way to explore alternatives, options, and "what-ifs." Be sure you understand what will be built, what it will look like, and what materials will be used. Insist on seeing submittals of all materials, surfaces, coverings, lighting, signage, and accessories. Ask for clear pictures of all architectural details. Watch out for features that are "over-designed"—too expensive for what they provide and not connected enough to your needs.

Check and double-check the information as it develops. You will probably need to develop skills in reading blueprints and floor plans.

Pay attention to the latest code requirements

While consultants and architects should be current in their knowledge of building codes, you should also develop a familiarity with the basic requirements, especially laws relating to the Americans with Disabilities Act and fire and seismic codes. Maintaining adequate aisle widths can become a serious challenge as the design develops, particularly if your budget constrains your ability to build the space you need.

Plan for growth

To the extent your construction budget allows, plan for future growth and expansion. This may take the form of instructing the architects to provide plans and options for expansion as the design develops. However, be careful to plan a building that you can afford to operate with your existing budget.

Document every step in the design process

Keep track of the evolution of the library design. A good architectural firm will provide minutes of the meetings they hold with you and your staff, but you should also keep track of the development of the design. Err on the side of too much documentation. You may find your records invaluable when questions or problems arise later. Be sure to date all of your records and indicate who was present at the discussions. Recording decisions as they are made will keep the record straight.


Participate fully in any "value engineering" discussions

If your design will cost more money than you have available, you will likely get involved in discussions about making cuts. Make sure that all options are explored and the consequences and impact of each are thoroughly reviewed. Be particularly alert to any impact on functionality.

Realize that planning does not end at this stage

Stay flexible, because you may be called upon to make changes in plans and designs throughout the construction process. In many projects, things get missed in the design phase, then show up during construction. Sometimes there are opportunities for improved designs that aid function; occasionally, you may be faced with difficult choices that compromise functionality and operations.

Conclusion

Each building or remodel project is unique, and that makes it very difficult to prescribe a cookbook approach to the planning effort. Add to that the presence or absence of staff experience with building projects, and you have an interesting situation. You may feel that by the time you finally figure out how to plan a building, it is too late! However, you are the owners of your building, and your enthusiastic involvement in the planning process will energize the other players. Be rigorous but flexible in playing your role, and the result should be a building to be proud of and a productive professional relationship with your architects, designers, and contractors. 

Planning Amid a Multitude of Projects

(Continued from page 15)

sense even when the benefit each library receives is small. Although consortia offer many intangible benefits, such groups need to account for all costs so that most projects will make sense from a business perspective as well.

Summary

I recently completed editing three special issues of *Information Technology and Libraries* dedicated to library consortia.¹ In addition to six articles from the United States, these three issues of *ITAL* include contributions from South Africa, Canada, Israel, Spain, Australia, Brazil, China, Italy, Micronesia, and the United Kingdom. Taken together these groups represent a dizzying array of organizing principles, membership models, governance structures, and funding models. Although most are geographically defined, the type of library they serve also defines many of them. Virtually all license electronic resources for their membership, but many offer a wide variety of other services including shared catalogs, union catalogs, patron-initiated borrowing systems, authentication systems, cooperative collection development, digitizing, instruction, preservation, courier systems, and shared human resources.

Consortia display such broad variety that it can be difficult to detect common themes and “best practices.” It is clear that the technology of the Web, the increasing importance of electronic resources, and advances in resource-sharing systems have created new opportunities for consortia. Beyond these technological and economic motivations, in consortia we see the librarian’s instinct for collaboration being brought to bear at a time of great uncertainty and rapid change.

Planning to meet the varied interests of member libraries in this uncertain environment can be quite challenging. The keys to meeting this challenge are flexibility, a spirit of experimentation, the adoption of sound business practices, and ultimately the commitment of member libraries and their willingness to adopt the consortial perspective. The best consortia build on shared values while furthering the unique strengths of each member library. ☐

¹ *ITAL*, Vol. 17, Number 1, March 1998; Vol. 18, Number 3, September 1999; and Vol. 19, Number 2, June 2000.

Visions of the Future

(Continued from page 2)

The first environmental scan provided some insights into demographic, economic, and political trends within Oregon. Many of the findings were sobering. For example, despite a growing prosperity, Oregon has the highest percentage of hungry households in the nation. Like many states, Oregon is getting older. By 2010, the state will have the fourth oldest population in the nation. This Hispanic population grew 66 percent between 1990 and 1997, while the state’s overall population grew 13 percent. Small businesses rather than major industries and larger corporations dominate Oregon’s economic landscape. From 1992 to 1996, small businesses created 98.5 percent of the job growth in the state. Forty-five states have budget stabilization or “rainy day funds.” Oregon is one of five states that does not.¹

The assessment of Oregon libraries also provided a rich context for OLA’s planning purposes. Overall, there have been many improvements in library service since Vision 2000 was published. More Oregonians have access to local libraries, and many resource sharing programs have enhanced the availability of library collections throughout the state. Significant improvements have been made in the area of information technology. Ninety-five percent of public libraries in the state are connected to the Internet. Despite these positive trends, there are a number of issues that need to be addressed and services that could be improved. For example, Internet connectivity is widespread, but the quality of those connections is lacking. Forty-eight percent of public libraries have only dial-up access to the network over regular phone lines, usually through a single computer. In 1990, a property tax limitation proposal

passed in a general election, and education was hit hard by subsequent budget cuts. The schools were forced to make some hard decisions, and many K-12 libraries had to reduce services. In 1998, the number of certified school library media specialists numbered 588, about 20 percent fewer than in 1992. According to the author of the report on Oregon libraries, school media centers have slipped into obscurity. There is little recent information on their status, and several major statewide reports on K-12 education make no mention of libraries.²

Within the academic community, the report is also mixed. During the 1990’s, student and faculty access to research collections improved significantly through the development of two consortia: Portals (Portland area libraries) and Orbis (academic libraries in Oregon and Washington). Group purchases of electronic resources allowed many libraries to expand access to expensive databases. At the same time, the two largest research collections in the state, the University of Oregon and Oregon State University, collectively cut more than one million dollars in journal subscriptions.


A third report was prepared to provide the Vision 2010 planning committee with some general trends that are occurring within the profession and affect libraries nationwide, not just in Oregon. The major themes that emerged from this report include the development of electronic resources (including the e-book, multimedia, and large repositories of raw data); copyright, privacy, intellectual property concerns; recruitment and retention of talented staff; and changes in user expectations.

Now that all the groundwork has been established, the planning process should proceed smoothly. The reports tell us what the trends are, what the service needs are, what major challenges exist now and in the future. However, assimilating all this information and setting priorities remains a difficult task. The Vision 2010 committee has several hurdles to overcome before it can unveil a relevant and substantive plan for the next decade.

First, the committee needs to resist the temptation to create a laundry list, which reflects all our aspirations and covers every issue of library service. Laundry lists are unnecessary; many of these improvements will happen without a statewide plan. Also, because of their length, these long lists of activities tend to divert attention away from the more critical objectives. Ideally, OLA's plan should focus on those goals that might not be met if the Association does not take a leadership role in articulating the need and charting a course of action. For example, we know the state's Hispanic population is growing faster than any other sector. Do libraries have plans to develop their collections in Spanish? Do they have plans to hire Spanish-speaking librarians? OLA can give visibility to this need and make it a priority within the state.

Second, the committee needs to create a plan that is unique to Oregon and fits the set of circumstances that exist in this state. For example, we know that small businesses are the bread and butter of the state's economy. Do we have the collections and services that can meet these special information needs? Are we the first place people go when they want to start their own business?

And third, the committee needs to focus on measurable results. There is a wealth of statistical information in the environmental scans can be used to set new and challenging benchmarks. For example, many libraries project 75 percent of the professional staff will be lost over the next fifteen years due to retirements.³ At the same time, the number of qualified candidates for most jobs is declining. Worthy goals for consideration include efforts to improve access to professional education within the state and programs to aggressively market Oregon and recruit librarians from other regions of the country. Measurable objectives might include a targeted increase in the number of applications for entry-level positions.

Long-range planning is not common among the state library chapters. A quick search turned up only one or two published efforts by other states. Given the rapid changes that are affecting libraries, it becomes very difficult to prescribe a set of goals and actions that will make sense five or ten years into the future. Although the title of Oregon's plan is Vision 2010, the committee is realistic in its ability to forecast future needs. It's intention is to break the time period into two-year segments, and review and revise as necessary on this more frequent schedule. With any luck, this new plan will produce as many positive results as its predecessor has. At the very least, it has already produced a clearer understanding our environment and the special conditions that exist within Oregon's communities. 

¹ Goodrich, Jeanne. Oregon Environmental Scan; Prepared for the Oregon Library Association Vision 2010 Committee, January 2000. <http://www.olaweb.org/v2010/scan2.pdf>

² Metz, Ruth. Scan of Oregon Libraries; Prepared for the Oregon Library Association Vision 2010 Committee, January 2000. <http://www.olaweb.org/v2010/scan2.pdf>

³ Webster, Janet. Trends in the Library Profession; Background for OLA's Vision 2010, March 2000. <http://www.olaweb.org/v2010/trends.html>.

OREGON LIBRARIES: PROFILE-IN-BRIEF

- There are 255 academic, special and public libraries in Oregon. There are 198 school districts and 1,246 schools according to the Oregon School Directory 1999-2000, published by ODE. We assume that every school has a library of some sort, though their viability is unknown.
- Combined operating expenditures for the reporting academic, special and public libraries were \$122.2 million in 1997. No such data could be found for school library media centers.
- The combined collections of reporting academic, special and public libraries total over 24 million units. There is no recent comparable data available for school libraries.
- Paid staff for the reporting academic, special and public libraries number about 2200. Of these, 723 are librarians, with 74 percent having ALA-accredited masters degrees. Nationally, the ALA-accredited MLS rate is 69 percent.
- There are 588 certified school library/media specialists in public schools. The number of other media center staff is not known.
- The reference activity in Oregon's public libraries is lower than the national norm. Nearly 27 percent of Oregon libraries surveyed by Himmel and Wilson in 1998 reported handling 10 or fewer reference transactions per week.¹⁰
- Oregon's main library professional associations have a combined membership of over 1400. Continuing education is available through the professional associations, the state library, and various library cooperatives and consortia and affiliate organizations. Professional education is available in Oregon through Emporia State University School of Library and Information Management working in cooperation with Oregon University System.

¹⁰ Himmel and Wilson, An Evaluation of the Oregon Reference Link Program, Milton, WI, December 1998, p. 28.