OLAQ

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

Deborah A. Carver
University of Oregon Library

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

by Deborah A. Carver
Interim University Librarian,
University of Oregon

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 lead 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 is 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.

Planning Amid a Multitude of Projects

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

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.