



LIBRARY PHOENIX

STRATEGIC PLAN, 2013-2014

LI805XO

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EXECUTIVE SUMMARY

The community of Phoenix County, Oregon, was hit hard by the recent economic downturn. County finances, heavily impacted by timber sales, declined dramatically. In 2010, the county, facing significantly reduced financial resources, closed the main library and its two branches. The county had attempted to keep the library open with a plan for a library district funded with a dedicated tax, but in the difficult economic climate the measure failed. Library supporters went to work, and a revised proposal for a much smaller tax was approved by voters. The library would be able to reopen.

A year later, the library is on its feet, with staff hired and services reestablished. The library now turns its attention from surviving to building. After surveying constituents, three important areas were identified in which the library can improve services in order to meet the needs of the community that rallied to support it. The initiatives are aimed at helping the community to not only survive, but thrive as it maneuvers through an economically tumultuous time.

INITIATIVE 1: INCREASE THE EMPLOYABILITY OF THE COMMUNITY

The community faces a period of economic realignment. A rural area that has primarily depended on the exploitation of natural resources must transition to fill new occupations, including technology and tourism. The library can serve a valuable role in supporting the county's population as it makes this transition. Our plan includes partnership with government entities to offer job search training and services.

INITIATIVE 2: INCREASE SERVICES TO THE LATINO POPULATION

Phoenix is a county in demographic flux. The Latino population more than doubled in just two decades and is now 29% of the county population, while Latino students comprise nearly half of the county's students. The library has a moral obligation to make sure this population is included in its strategic outlook, but there are also practical reasons for outreach to the Latino community. In the voting for the library district, the areas most populated by Latinos were less supportive of the tax measures. While there are likely economic reasons for this – these areas also tend to be lower income, and the residents may simply have felt less able to absorb an additional tax – it is also true that the needs of this population have not been adequately addressed by the library. Latinos are a rapidly growing segment of the Phoenix population and the library needs to reflect this fact, from its board membership to its collection development.

INITIATIVE 3: IMPROVE YOUTH SERVICES WITH ENHANCED STORYTIMES

Our third initiative focuses on what is always one of the county's most important resources, its children. This initiative will build and support young readers – a long-term strategy that will bolster the county's ability to grow and change with the times, as well as promote the library's place in patrons' lives.

The library's resourceful team has found ways to serve each of these goals with relatively little expense, in ways that will yield important value to the community as it navigates this difficult era of change. The initiatives are focused on what the populace needs most, while working to cement the library's role as an important force in the community.



ORGANIZATIONAL PROFILE

OVERVIEW

The Phoenix library is a medium-sized public library located in rural Phoenix County, Oregon. The system serves a population of approximately 23,000 people with print, audio-visual, and electronic resources, as well as programming for youth and adults. The library system is comprised of a main branch in Ashville, the center of the county's population, and two smaller branches in the outlying towns of Roc and Strix.

The Phoenix County Library system was historically funded as a county department dependent on monies earned by county timber sales. When timber sales dwindled, funding plummeted to a level that would no longer support library operations. A proposed tax measure to levy funds for the library failed and the library laid off all of its staff and shuttered its three branches for a period of six months, the period of time between the spring and fall general elections. During the library closure period, a group of library supporters, government officials, and small businesses formed a partnership to create a second ballot initiative to form a special library district. This proposed district requested a taxation amount significantly lower than the amount requested in the failed spring ballot initiative. The newly proposed district received majority support and was voted in during the 2011 elections, creating the Phoenix Library Service District.

A strategic plan was put into place by the newly formed board as the Phoenix Library District came into being. The plan focused on establishing basic operations, staffing structures, and service benchmarks for its first year of operation. Now that the library has a stable source of funding and has established basic levels of service, it is time to create new strategic goals to implement a vision for the future of the library services in Phoenix County. The library board and staff have assessed and analyzed the community's information needs and are ready to put a 24-month strategic plan in motion for the district.

The new strategic plan primarily focuses on three initiatives that will address the greatest service needs identified during the first year of the newly formed library's operation. Those initiatives are to increase the employability of county residents, as unemployment and a dearth of technologically-skilled labor has been identified as a need that must be addressed; to develop and increase services to the Latino population, as that population is the fastest growing in Phoenix County; and to expand and improve upon youth services programming and materials, as more families with young children and children with special needs are in the community and as such they expect such services from the library.

One year as an established service district reveals that there is approximately 10% more revenue collected through the taxation of assessed property values, and the strategic plan assumes the same amount for the year 2014. This additional money will allow the library to enhance some of its services and purchase some additional materials. Furthermore, one senior library employee in public services is expected to retire within the next six months. Her position will be recruited for with a bilingual preference (English and Spanish).



BOARD AND STAFF

- 📌 Board of Directors (5 unpaid)
- 📌 Library Director (1 FTE)
- 📌 Operations Assistant/Business Manager (1FTE)
- 📌 Cataloging Specialist/Acquisitions Manager (1 FTE)
- 📌 Adult Services Librarian (1FTE)
- 📌 Youth Services Librarian (1 FTE)
- 📌 Youth Services Outreach and Office Specialist (1 PT)
- 📌 Children's Services Assistant (1 PT)
- 📌 Public Service Clerks (5 PT)

LIBRARY HISTORY

The county of Phoenix, Oregon has provided library services since 1912. The first library was created by the Ashville Women's Library Club and operated over the top of a storefront, until funds and support were gathered to build a Carnegie Library near the center of town in 1914. The branches of Roc and Strix were added in the 1960s, when timber sales in Phoenix County were particularly abundant, and as these two towns had emerged as having communities with population concentrations within the county.

The library operated in this primarily agricultural community with increasing and then static funding for approximately 80 years. The region's abundant timber and orchard resources brought in handsome revenue, which was shared with the library system. In the 1990s, due to environmental and industry-driven changes in both timber and other agriculture, as well as the rising costs of other government operations, the library's share of money from the general fund began to flatten. From the beginning of the 21st century and up until 2009 the funding for the library shrank each year, causing a squeeze, and that led to a decline in materials, services, building maintenance, and staffing. By 2009 there was no longer money to fund basic operational costs for the county's libraries.

The passage of the 2011 Phoenix Library Service District has infused new dollars as well as fresh energy and ideas into the library, its staff, and its services. The board is comprised of opinion leaders and professionals in the community. With a new director as well as new and seasoned staff, the administration has been able to quickly and transparently forge a new service model that is underscored by its dedication to transparent operations, careful stewardship of taxpayers' dollars, and a consensus-building operational style.

ABOUT PHOENIX COUNTY

- 📌 **GEOGRAPHY AND CLIMATE:** Phoenix County's northern boundary is the Phoenix River. The county encompasses nearly 550 square miles; about 98% of that is land and approximately 2% is water rights extending into the river. The area is rich in timberlands, with 64% of the county being under the ownership of the United States Forest Service. Additionally, it is one of the preeminent pear and apple growing regions of the United States. Land committed to wine grapes has expanded in the past decade as well.
- 📌 **POPULATION:** There are close to 23,000 inhabitants of Phoenix County. Approximately one third of the inhabitants live in Ashville. Other population concentrations can be found in the



small towns of Roc, at about 1,500 inhabitants, and Strix, at approximately 350. The remainder of the population is scattered throughout the rural zones of the county. As of the 2010 census there were approximately 7,500 households in the county, of which 36% had included youth under the age of 18 living with them. Nearly 60% of the households had married couples living together but almost 30% of the households were comprised of people who were no relation to one another.

- ❖ **ETHNICITY:** The self-reported racial data from the 2010 census reveals that Phoenix County is 78% White, 29% Hispanic/Latino, 15% Pacific Islander, and less than 2% each African American, Asian or Native American. 76% of the residents spoke English as their first language and 23% reported speaking Spanish as a first language.
- ❖ **EDUCATION:** The county is served by the Phoenix County School District. There are five elementary schools, two middle schools, one high school, and one K-12 facility (in Roc) that comprise the public school system. Additionally, there is one K-12 Christian school and a Seventh Day Adventist school which are both private. The region hosts an extension campus for a community college in a neighboring county. Educational attainment is higher than the Oregon average, with 84% of the population being high school graduates and 26% with a Bachelor's degree or higher. Of significance is the fact that 46% of the county's high school graduates in 2010 identified as being of Latino heritage.
- ❖ **CULTURE:** Phoenix County is a tourist draw, attracting visitors to its views of its two dozen National Historic Register homes and the river; the lush agricultural valleys provide festival activities during blossoming and harvest times. The Phoenix River attracts wind and kite surfers as well as boaters. The hilly terrain makes the area a mecca for mountain bikers, rock climbers, and hikers. The county boasts parks, swimming pools, a skate park, and multiple golf courses. The downtown area has many popular, privately owned restaurants and a microbrewery, attracting visitors and locals alike.
- ❖ **ECONOMY:** Although agriculture is the primary source of income for the county, only 10% of the population works in this sector. The county has around 2,500 firms of all types outside of the farming sector. The other primary employers are in the government and health care sectors. Approximately 6% of the 950 non-farm, private business establishments are owned by Latinos. The unemployment rate of the county is at 6.8%, more than one percentage point lower than the Oregon average. However, this rate is a significant jump from pre-2007 levels of only 4.9% unemployment in the county.

MISSION

The Phoenix County Library District's mission is to be our community's gateway to the power of information and imagination by providing customized materials and services for the informational, recreational and educational needs of all of its members.

In order to accomplish this we:

- ❖ Always keep the taxpayer at the forefront of policymaking decisions.
- ❖ Partner with other agencies, both to enrich the services of each and to avoid duplication of effort.
- ❖ Keep open ears and eyes to all sectors of the community to constantly identify and address ever-changing information needs.



GUIDING VALUES

OPEN ACCESS: The library values free, unrestricted access to its collections and services. We are committed to connecting our customers to the ideas, information, and materials they wish to explore in a friendly, nonjudgmental manner. We strive to offer equal access to materials, programs, and services that represent the needs of our diverse population. We aim to democratize information and provide platforms for its creation and dissemination.

CUSTOMER FOCUS: The library values all customers and is responsive to their service needs. The customer's opinion and input is welcomed in all initiatives and undertakings. We consider the impact on the customer in all our decisions, and place a high value on collaboration. We strive to provide a respectful, compassionate, and user-friendly environment, while placing an emphasis on protecting patron privacy and confidentiality.







Excellence: The library values excellence, individually and collectively. We offer quality service to all customers by displaying a positive attitude and valuing the diversity of people and perspectives. We pursue integrity and competence in our personal and professional actions. We strive to earn the trust and confidence of all customers.

GROWTH AND INNOVATION: The library values continuous learning and innovation to keep itself and the community up to speed with a rapidly changing world. We respond to present situations and anticipate future needs. We strive to be fast and flexible in providing access to and education in new technologies. We believe it is part of the library's role to support life-long learning for all its constituents.

GOOD STEWARDSHIP: The library values responsible stewardship of all the resources with which it and its board and employees have been entrusted. We are accountable for ensuring the proper use of public funds. We take seriously our responsibility to maximize the efficiency of staff time and talent, making the best use of all our resources in the delivery of quality library service. To earn and keep the trust of our taxpayers, we are committed to transparency of all library finances, services, operations, and policies.

LIBRARY STAKEHOLDERS

The Phoenix County Library Service District sees all of its users and potential users as stakeholders in the library's future and success. Because a motivated group of government employees and elected officials, private business people, and community members at large came together to resurrect the Phoenix Library after its closure, special attention is paid to the consensus and information-gathering work they did on behalf of the formation of the new service district. For those efforts, the District recognizes the following stakeholders as being crucial to its formation and future:

-  The agricultural community
-  The growing Latino community
-  The Library board members
-  City and county government
-  Small business owners, industrial business managers, and health care workers of the region
-  All schools in the Phoenix region, including public, private, and higher educational institutions



PREPARATION AND PLANNING

The strategic planning process began 9 months after the library reopened, with a survey of users aimed at determining what services were most important to users and what services users would like to see improved. The results of the survey were discussed at the quarterly board meeting, and a decision was made to expand the strategic planning team beyond the board and library director to include several other members of the community as well as the full-time employees of the library. The additional community members recruited included a county commissioner, a local Head Start teacher, a paralegal who works for an immigration attorney, a human resources professional from the local community college, a local farmer, and a local business owner. The library board currently includes a library foundation member, a grade school principal, the manager of the local bank, and a CPA. In addition to the library director, the full-time employees of the library include the operations/business manager, the adult services librarian, the youth services librarian, and the cataloging specialist/acquisitions manager.

The strategic planning team determined that the goals that would have the most impact for the community were goals that focused on the needs of the Latino community, addressed the needs of jobseekers and the employability difficulties faced by some in the community, and addressed the needs of children who fall outside the scope of standard services. The larger team then broke into three smaller teams based on interest and expertise to establish an action plan for each initiative. A member of the library staff headed up each team, with the adult services librarian spearheading the initiative to increase services to Latinos, the library director leading the team focused on employability, and the youth services librarian heading the team on enhancing services to youth. While the adult services librarian will be retiring at the end of the fiscal year, she will head up the initial planning stage of the initiative to increase services to Latinos, focusing on conducting a candidate search for a bilingual replacement and beginning the recruitment effort for a board member from the Latino community. The new adult services librarian will then continue leadership of this initiative.

The participation and leadership of the library staff was essential in that they understand the daily workings of the library and the strengths of the staff members needed to carry out the initiatives. Input from the larger community was vital to ensure that the strategic plan aligned with the library's mission-driven aims of keeping the taxpayer at the forefront of policy decisions, addressing changing information needs, and providing service to all the library's stakeholders.

PLANNING FACTORS

LIMITING FACTORS

The strategic plan was limited by several factors, including budgetary concerns, staff size and time, and community sentiment. Community sentiment is both a limiting and a positive factor – currently quite positive, but subject to change.

- 📌 **LIMITED FUNDS:** Though the library now has a stable source of funding, the economy of the region is still recovering and the property tax values on which the library depends will not likely increase in the near future. Budget levels are expected to be mostly flat, with only



slight increases that barely keep up with inflation. Because estimates for the tax to be collected on assessed property value were conservative, approximately 10% more revenue was collected in the first year of the district's formation than was anticipated, and this provides the funding for the strategic initiatives.

- ❖ **SMALL STAFF:** Library staff is limited to five full-time employees and seven part-time employees staffing the main library and two branches.
- ❖ **COMMUNITY SENTIMENT:** The library is currently enjoying a honeymoon period. The community was without a library for six months, and eagerly greeted the reopening of its libraries. This period will likely not last, and the community will be closely watching the library for any signs of failure to meet expectations or budgetary waste.



POSITIVE FACTORS

There are several factors that aided in creating the strategic plan, including strong community involvement and a motivated, dedicated staff.

- ❖ **COMMUNITY INVOLVEMENT:** The Phoenix County Library District was created through the efforts of a motivated group of government employees and elected officials, private business people, and community members at large. This group has a vested interest in helping the new library district thrive.
- ❖ **DEDICATED STAFF:** Having been present at the resurrection of library services in Phoenix County, the staff of the library is particularly dedicated to demonstrating the value of the library to the entire community.

CURRENT REALITY

ENVIRONMENTAL SCAN

POPULATION: It is important for the library to recognize that more than one quarter of the population of Phoenix County is Hispanic/Latino, and also to realize that this population has been underserved by the library in the past. It is also noteworthy that almost half of the county's 2010 high school graduates self-identified as being of Latino heritage. As this segment of the population continues to grow, providing adequate services and materials to this user group becomes increasingly important.

EMPLOYMENT: While the unemployment rate in Phoenix County is slightly lower than the state average, it is almost two percent higher than it was just a few years ago. Providing resources for jobseekers and assistance with technology is a way in which the library can demonstrate its value to the community.



NEW INDUSTRIES: The government of Phoenix County is working to bring new industries to the county. Currently, possibilities include a casino and biomass plant. These new industries would not only bring jobs for existing residents, they would bring new residents to the county and new stakeholders to the library community.

RURAL ENVIRONMENT: In a rural environment such as Phoenix County, internet access is often inconsistent. For the significant numbers of individuals who do not have internet access at home or at work, the library is an essential resource.

SWOT ANALYSIS

STRENGTHS

- 📌 Rebranded library
- 📌 Supportive community – voted in favor of district
- 📌 Demonstrated wish for library
- 📌 Dedicated staff
- 📌 Dedicated board
- 📌 Zero debt
- 📌 Good infrastructure
- 📌 Ability to retain excess funds from previous budget

OPPORTUNITIES

- 📌 Increase in partnerships
- 📌 Potential grant funding
- 📌 Targeted services
- 📌 Revived awareness of the library
- 📌 Development of volunteer base
- 📌 Potential new industries in county: biomass and casino

WEAKNESSES

- 📌 Limited staff resources
- 📌 Limits of services available
- 📌 Aging technology
- 📌 Limited tech infrastructure
- 📌 Limited connections to and support for Latino community

THREATS

- 📌 Percentage of population disenfranchised
- 📌 Limited time to prove worth
- 📌 Operating under a microscope
- 📌 Latino community does not feel represented by staff or board, or adequately served
- 📌 Natural resources or ecological threats that could affect tax base: pine beetle infestation, fruit flies, bee colony collapse
- 📌 Rising fuel costs impact tourism negatively, potentially resulting in a local business downturn
- 📌 Broadband availability and speed is determined by number of users. Possible system crashes.



ORGANIZATIONAL PERFORMANCE

ACTIVITY	PERFORMANCE MEASURE	CURRENT PERFORMANCE
Storytimes	Number per week (attendees per event)	2 per week (avg. 12 per event)
Spanish or bilingual materials acquired and cataloged	Number per month	3 items per month
Computer skills classes	Number per month (attendees per event)	0 classes offered

METRIC FOR PARTNERING WITH GOVERNMENT AGENCIES

Initial contact

Face-to-face meeting to discuss elements of plan

Obtain signature for Memorandum of Understanding (MOU)

Meet and develop plan with dates of workshops and goals

- ❖ Increase storytime attendance by 50% to 24 per event.
- ❖ Add additional storytime at main library for special needs children.
- ❖ Increase amount of Spanish-language or bilingual materials acquired to 20–25 per month to enhance the materials available to our Spanish-speaking population.
- ❖ The staff at the reference desk currently offers computer assistance to patrons on a case-by-case basis. A computer skills class offered twice monthly is our goal, and we would like to have at least 5 attendees for each session.
- ❖ Additionally, our goal is to have volunteers available at all three branches for up to 5 hours a week for computer assistance.

GAP ANALYSIS

The library is currently operating under a strategic plan that was created prior to the library reopening, which aimed to reestablish basic library services for the county. The user survey that was conducted as the starting point of the most recent strategic planning process provided excellent information regarding the strengths and weaknesses of current library services. The community is responding positively to the new library structure. For the most part, users noted satisfaction with the level of basic services such as operating hours, materials available, and activities and special events offered.



Now that basic library services have been reestablished, users are beginning to express a desire for more expanded services. The user survey revealed that the library serves many families who have children with special needs, and these families are often reluctant to attend regular storytimes. Storytimes that target families with special needs offer experiences to encourage participation on all levels, and can be tailored to the needs of children. The child may be physically handicapped or have autism spectrum disorders. The library currently does not offer storytime for special needs children. While the sensory storytime would be open to all families, those families whose children would benefit from a sensory storytime will be invited and encouraged to attend.

The staff at the reference desk has noted that an increasing amount of their time is spent on aiding users with basic computer skills, such as using a mouse, creating an email address, or printing. Many of these individuals are using the library computers to aid in their job search. Offering basic computer skills classes would be a more efficient way to provide users with the skills that they need. The library does not currently offer any programs to aid job seekers with their search, though the reference staff has helped individuals who have sought assistance. The staff would like to see a more focused effort in this area. In addition to the classes that the library staff will offer, the staff plans to recruit high school students to provide basic computer help and troubleshooting to patrons on a volunteer basis. The library will partner with local employment agencies to hold workshops for resume creation and review and mock interviews.

The user survey revealed that there is a desire in the Latino community for materials that are not part of the library's collection, particularly Spanish-language titles. The Spanish-language materials currently available are limited. The staff has also noted that Spanish speakers have difficulty navigating the library's English-only webpages. Adding a resource page for Spanish speakers to the library's website that all library staff could direct users to would improve service to the Latino community.

NEW PRIORITIES

STRATEGIC PROFILE

In 2008 the economy took a major downturn, resulting in the worst recession in over 80 years. People across the nation were out of work. Many are still unemployed today. The job market may be improving; however, many are still out of work because the job market has changed considerably in the past few years. Entry-level positions are more difficult to find, and employers are demanding that employees develop more skills. Job competition is fiercer than ever, and people are struggling to find ways to give themselves an edge over their competition. Libraries have recognized this growing need, and are reaching out to their communities by offering classes and partnering with employment agencies. Libraries are striving to help their communities by helping members with job searches, resumes, and cover letters. More and more libraries become more dynamic in their services as the needs of their community change.

Each year library patron populations become more diverse. People are more mobile now than ever before, and they are travelling across the United States and the world to find work, raise a family, and become a part of a community. For immigrants, using libraries can be a challenge; especially for those who speak very little or no English. This trend has pushed libraries into purchasing materials in multiple languages, even if the library staff is not multilingual (Baker,



2012). Despite all their effort, libraries are still concerned about how much of an impact their multi-language collections are having on their populations, and desire to know more about what materials and services their minority populations wish to see.

Library communities are also seeing a rise in autism and other developmental impediments. Seeing this need, libraries are scrambling to create programs to meet the needs of these children and community members. The task is not easy, but with specialized training, libraries can become an important part of the lives of all children and their parents or guardians. The Phoenix County Library has taken note of these shifts, and in order to respond to county residents who kept faith in the library and allowed it to reopen, the library has chosen three strategic initiatives for 2013–2014 to meet and exceed their community’s library service and program desires and expectations.

FUTURE VISION

“When it comes to the future, there are three kinds of people: those who let it happen, those who make it happen, and those who wonder what happened.” –John M. Richardson, Jr.



After being reopened after six months of closure, the Phoenix County Library is no longer going to be an organization that lets the future happen. We are going to transform into an organization that makes the future happen.

With careful strategic planning, the library will rise and exceed the expectations of the community members whose support reopened our doors. Our mission is to be the

community’s gateway to the power of information and imagination. In order to show the Phoenix community how our mission fulfills our new vision to make the future happen, we will:

- ❖ **BUILD:** Strong partnerships with businesses and community members are extremely important for the continual survival of the library. We desire everyone to have equal access to information so they can succeed in all aspects of their lives. Partnerships will ensure that the information needs of community members and businesses are not neglected.
- ❖ **DEVELOP:** A solid and diverse collection will help expand our programs and services to meet the needs of those in our community who have up until now been overlooked. A wider diversity of resources will assist the library in encouraging and supporting lifelong learning in the community.



- ❖ **IMPROVE:** An enhanced service like storytimes is essential to the growing needs of the children and parents in Phoenix County. With a respectful, compassionate, and professional environment we will improve on our already fun and safe programs to keep everyone engaged and coming back for more.

Only by creating a strategic plan can we succeed in making the future happen, rather than letting the future happen. Our community has shown us they value our services, and we wish to deliver our best even as the future is unclear.

STRATEGIC INITIATIVES

We do not know what the future will bring, but we know what we need to do to make the future happen. By using the tools at our disposal, and by thinking strategically, we have created three strategic initiatives reflecting our mission and values and the information we gained from our gap assessment and SWOT analysis.

INITIATIVE 1: INCREASE THE EMPLOYABILITY OF THE COMMUNITY

GOAL 1.1

Provide training and assistance in basic computer skills by offering classes twice a month and by recruiting 10 high school volunteers to staff the reference desk for computer assistance (up to 5 hours per week at each branch).

GOAL 1.2

Increase support for jobseekers by partnering with regional government agencies to offer quarterly workshops on resume creation and interview skills, and by hosting a job fair at the library attended by at least 50 individuals.

INITIATIVE 2: INCREASE SERVICES TO THE LATINO POPULATION

GOAL 2.1

Recruit a member of the Latino community to the library board by June, 2013.

GOAL 2.2

Replace retiring adult service librarian with a librarian who is bilingual (Spanish and English) in July 2013.

GOAL 2.3

Develop Spanish language collection, adding about 500 new print and AV Spanish and bilingual resources by December 2014.

GOAL 2.4

Develop a Spanish-language resource page on the library's website by February 2014.

INITIATIVE 3: IMPROVE YOUTH SERVICES WITH ENHANCED STORYTIMES

GOAL 3.1

Apply for donations for additional resources for storytimes in January, 2013 and 2014, and receive donations by August, 2013 and 2014.



GOAL 3.2

Offer enhanced storytimes for children with special needs once a month, beginning in September, 2013.

GOAL 3.3

Increase storytime attendance 50% over the storytime attendance in 2011–2012.

ACTION PLAN

INITIATIVE 1: INCREASE THE EMPLOYABILITY OF THE COMMUNITY

GOAL 1.1: Provide training and assistance in basic computer skills by offering classes twice a month and by recruiting 10 high school volunteers to staff reference desk for computer assistance (5 hours per week at each branch).

RATIONALE Two new employers are likely moving into the area, a biofuel plant and a casino, and we want our community to have knowledge of basic computer functions in order to remain competitive on the job market. Also, the reference staff has noted an increase in users requiring aid with basic computer functions like setting up email accounts.

ACTION STEPS

- 📌 Recruit computer-competent high school volunteers who are looking for volunteer opportunities for their senior projects or who are interested in helping library users.
- 📌 Schedule student volunteers to provide computer aid up to 5 hours per week in each branch.
- 📌 Use 5% of the reference desk staff's off-desk time to provide basic computer skills classes.
- 📌 Advertise classes in the library's electronic newsletter, in the Phoenix County weekly newspaper, on the library's website, on the library's Facebook page, via PSAs to the local radio stations, at the employment office, and on popular bulletin boards around the county.

RESOURCES NEEDED

- 📌 Staff time.
- 📌 All library computers (excluding those specifically for the catalog) for 90 minutes for each class.
- 📌 At least 10 student volunteers.
- 📌 Cooperation of high school personnel and parents.
- 📌 Funds for printing and advertising.



GOAL 1.2: Increase the support for jobseekers by partnering with regional government agencies to offer quarterly workshops on resume creation and interview skills, and by hosting a job fair at the library attended by at least 50 individuals.

RATIONALE Our user survey showed one of the top five reasons users come to the library is to use library resources for job searching. The survey also indicated library users would like additional support in job searching.

ACTION STEPS

- ✔ Partner with Worksource Oregon and MidColumbia Council of Governments to provide resume creation guidance and opportunities for mock interviews.
- ✔ Set-up quarterly seminars with these employment specialists for resume creation, resume review, and mock interviews.
- ✔ Provide aid with online job searching.
- ✔ Ensure reference staff is familiar with local employment websites, as well as popular online job sites.
- ✔ Post signs in the reference area and around the computers encouraging users to ask the reference staff for assistance in navigating the employment sites and filling out online applications.
- ✔ Partner with local agencies and employers to hold a job fair at the main library.
- ✔ Invite local employers and agencies to attend the job fair.
- ✔ For the job fair, post both paid and volunteer positions.
- ✔ Advertise the library job fair on popular bulletin boards around the county, in the library, in the library's electronic newsletter, on the library's website, on the library's Facebook page, via PSAs to the radio station, and in the Phoenix County weekly paper.
- ✔ Purchase beverages for job fair attendees and employers.
- ✔ Adjust library space to accommodate employers and agencies.
- ✔ Provide tables, chairs, paper, and pens.

RESOURCES NEEDED

- ✔ Staff time.
- ✔ Meeting room time.
- ✔ Cooperation of local agencies and employers.
- ✔ Funds for hosting job fair.
- ✔ Funds for printing and advertising.



INITIATIVE 2: INCREASE SERVICES TO THE LATINO POPULATION

GOAL 2.1: Recruit a member of the Latino community to the library board by June 2013.

RATIONALE	The library board wants to become representative of the county's population, which is becoming increasingly Latino.
ACTION STEPS	<ul style="list-style-type: none">📌 Create board member recruitment strategy, including outreach to and exploration of the Latino community.📌 Advertise board member opening on popular bulletin boards around the county, in the library, in the library's electronic newsletter, on the library's website, on the library's Facebook page, and on the Spanish-language radio station.📌 Have staff talk to Latino community members about the board member opening.📌 Try to persuade the local newspaper to write an article about the library's effort to recruit a Latino community member to the board.
RESOURCES NEEDED	<ul style="list-style-type: none">📌 Staff time📌 Funds for printing and advertising

GOAL 2.2: Replace retiring adult services librarian with a librarian who is bilingual (Spanish and English) in July 2013.

RATIONALE	Our user survey showed the Latino population does not feel that the library is meeting their information needs. To help address this, the library would like to hire a full-time individual who speaks Spanish and English to replace the retiring adult services librarian.
ACTION STEPS	<ul style="list-style-type: none">📌 Write job description.📌 Advertise the position on the library's website and Facebook page, in the Phoenix County weekly newspaper, in the Oregonian, on Libs-Or, in the Emporia MLS listserv, on popular bulletin boards around the county, and via PSAs to the local radio stations.📌 Conduct interviews.📌 Perform background checks.📌 Check references.📌 Hire an individual.📌 Train the new employee.📌 Advertise new employee's hours and bilingual ability on the library's website, Facebook page, and around the library.
RESOURCES NEEDED	<ul style="list-style-type: none">📌 Staff time.📌 Funds for printing and advertising.📌 Funds for background checks.



GOAL 2.3: Develop our Spanish language collection, adding about 500 new print and AV Spanish and bilingual resources by December 2014.

RATIONALE Our user survey showed the Latino population does not feel the library is meeting their information needs. Survey responses also showed that more Latino community members would use the library if they had a more substantial and updated Spanish-language collection.

- ACTION STEPS**
- ❖ Send the new bilingual adult services librarian and the cataloging specialist/acquisitions manager to a PLA conference on developing a Spanish-language and bilingual collection.
 - ❖ Establish a collection development plan.
 - ❖ Purchase necessary information resources that the new bilingual librarian and the cataloging specialist/acquisitions manager request to help them develop the Spanish-language collection.
 - ❖ Purchase Spanish-language AV and print materials.
 - ❖ Catalog Spanish-language AV and print materials.
 - ❖ Advertise new collection in the library's electronic newsletter, on the library's website, on the library's Facebook page, in the Phoenix County weekly newspaper, via PSAs to the local Spanish radio station, and on popular bulletin boards around the county.
-

- RESOURCES NEEDED**
- ❖ Staff time.
 - ❖ Funds for PLA conference.
 - ❖ Funds for 500 items.
 - ❖ Funds for printing and advertising.
-

GOAL 2.4: Develop a Spanish language resource page on the library's website in February 2014.

RATIONALE Our survey found that many Latino community members who do come to the library do not use the library's website to find resources, because they do not read English well. The library will add at least one Spanish language webpage with Spanish resources.

- ACTION STEPS**
- ❖ The new bilingual adult services librarian will create a new Spanish-language webpage on the library's website, with library addresses, hours, events, resources, et cetera.
 - ❖ Advertise new webpage in the library's electronic newsletter, on the library's Facebook page, in the reference area and around the computers, on the Spanish-language radio station, and on popular bulletin boards around the county.
-

- RESOURCES NEEDED**
- ❖ Staff time.
 - ❖ Funds for printing and advertising.
-



INITIATIVE 3: IMPROVE YOUTH SERVICES WITH ENHANCED STORYTIMES

GOAL 3.1: Apply for donations for additional resources for storytimes in January 2013 and 2014 and receive donations by August 2013 and 2014.

RATIONALE We need to recruit a minimum of \$500 in donations and sponsorships from local businesses to purchase reinforcement materials to be given to children attending the storytimes.

- ACTION STEPS**
- 📌 Develop and write a donation request letter.
 - 📌 Compile a list of donors and sponsors, and send request.
 - 📌 Assemble a list of reinforcements to be purchased with donations.
 - 📌 Purchase reinforcements.
-

- RESOURCES NEEDED**
- 📌 Staff time.
 - 📌 Postage.
 - 📌 Reinforcements.
-

GOAL 3.2: Offer enhanced storytimes for children with special needs beginning in September 2013.

RATIONALE Our user survey indicated there are parents in the county who would like to take their children to the library's storytimes; however, they are concerned about meeting the children's specific needs.

- ACTION STEPS**
- 📌 Send the youth librarian to attend training for sensory storytime to learn about developing activities and program plans.
 - 📌 Establish sensory storytime activities and program plans.
 - 📌 Schedule one sensory storytime per month.
 - 📌 Advertise new storytime in the library's electronic newsletter, in the library, on the library's website, on the library's Facebook page, via PSAs to the local radio station, and on bulletin boards around the county.
 - 📌 Inform the local elementary schools and preschools about the new storytime, and ask the schools to relay the information to parents.
 - 📌 Purchase necessary storytime materials.
-

- RESOURCES NEEDED**
- 📌 Staff time.
 - 📌 Carpet squares.
 - 📌 Flannel board.
 - 📌 Multiple copies of stories.
 - 📌 Sensory toys.
 - 📌 Resource books for parents.
 - 📌 Cooperation of elementary schools and preschools.
 - 📌 Funds for staff training.
 - 📌 Funds for printing and advertising.
-



GOAL 3.3: Increase storytime attendance by 50% from the storytime attendance in 2011-2012.

RATIONALE We want the average attendance at storytimes to be equal to or more than that of the storytimes in the last 12 months.

- ACTION STEPS**
- ❖ Create a spreadsheet to log attendance at storytime.
 - ❖ Develop an electronic mailing list to invite families to storytimes.
 - ❖ Advertise storytimes in the library's electronic newsletter, around the library, on the library's website, on the library's Facebook page, via PSAs to the local radio station, and on popular bulletin boards around the county.
 - ❖ Tell the local elementary schools and preschools about the storytimes.
 - ❖ Ask the elementary schools and preschools to relay to parents the information about the library's storytimes.
-

- RESOURCES NEEDED**
- ❖ Staff time.
 - ❖ Cooperation of elementary and preschool schools.
 - ❖ Funds for printing and advertising.
-



BUDGET

EXPENDITURES	FY 2013-2014	FY 2014-2015
INITIATIVE 1:		
Job fair	\$50	\$100
Printing and advertising	\$120	\$120
INITIATIVE 2:		
Spanish language/bilingual AV and print materials	\$5000	\$7500
Printing and advertising	\$0	\$100
Background checks	\$100	\$0
Conference (including travel)	\$680	
Employee salary	\$60*	\$1,040*
INITIATIVE 3:		
12 carpet squares	\$60	\$60
Flannel board	\$75	\$75
Flannel stories	\$200	\$200
Books	\$500	\$500
Training (including travel)	\$380	-
Printing and advertising	\$20	\$20
Postage	\$45	\$50
Reinforcements	In-kind	In-kind
Total	\$7,290	\$9,765

*Difference between current salary for position and expected salary for new hire.



TIMELINE

2013

- JANUARY**
- Write and mail donation request letter for storytimes.
 - Write partnership proposals for Worksource and Mid-Columbia Council of Governments.
 - Ensure all staff are familiar with employment websites and their applications.
 - Post signs about asking the reference staff for employment assistance.
 - Create board member recruitment strategy.
 - Advertise open library board opportunity.
-
- FEBRUARY**
- Create a draft plan of potential sensory storytime activities and programs.
-
- APRIL**
- Invite local agencies and employers to participate in the job fair.
-
- MAY**
- Advertise the open bilingual adult services librarian position.
 - Interview potential board members.
-
- JUNE**
- Begin employee hiring process.
 - Initiate new Latino library board member.
-
- JULY**
- Hire and train new librarian.
 - Host job fair.
 - Send youth services librarian to sensory storytime training.
 - Update and finalize the sensory storytime activities and programs plan.
-
- AUGUST**
- Establish a collection development plan.
 - Have the donations for storytimes collected.
 - Purchase necessary storytime materials.
 - Advertise regular and sensory storytimes.
-
- SEPTEMBER**
- Recruit high school volunteers.
 - Begin Spanish-language collection development.
 - Write computer class advertisements for each quarter in FY 2013–2014.
 - Create storytime attendance sheet.
 - Develop electronic mailing list for storytimes.
 - Hold first sensory storytime.
-
- OCTOBER**
- Advertise schedule for computer classes (occurring in FY 2013–2014).
 - Begin computer classes.
-



2014

JANUARY	<ul style="list-style-type: none">Advertise schedule for computer classes.Write and mail donation request letter for storytimes.Renew and maintain partnerships with Worksource and Mid-Columbia Council of Governments.
FEBRUARY	<ul style="list-style-type: none">Develop Spanish-language resource webpage.Advertise new Spanish-language resource webpage.
APRIL	<ul style="list-style-type: none">Advertise schedule for computer classes.Invite local agencies and employers to participate in another job fair.
MAY	<ul style="list-style-type: none">Send new adult services librarian and the cataloging specialist/acquisitions manager to PLA conference.Update the collection development plan.
JULY	<ul style="list-style-type: none">Advertise schedule for computer classes.Host job fair.Advertise the developing but improved Spanish-language collection.Increase the rate of development for the Spanish-language collection.Update the sensory storytime activities and programs plan.
AUGUST	<ul style="list-style-type: none">Have the donations for storytimes collected.Purchase necessary storytime materials.Advertise new sensory storytimes.Advertise new regular storytimes.
SEPTEMBER	<ul style="list-style-type: none">Recruit new high school volunteers.Write computer class advertisements for each quarter in FY 2014–2015.
OCTOBER	<ul style="list-style-type: none">Advertise schedule for computer classes (occurring in FY 2014–2015).

PERFORMANCE MANAGEMENT

SYNERGIES

Our first initiative, increasing community employability, works well with our second initiative, Latino outreach, because we want to increase our services to the Latino population, and one way we can help bring Latino community members into the library is to help them find and apply for jobs.

Our second initiative works well with our first initiative because we are creating an employment opportunity for which community members can apply. We are also offering the board member opportunity, which will help us ensure that our first initiative is attuned to Latino needs.



Our second initiative has the potential to work extremely well with our third initiative, broadening storytime services, because in the future we plan to have our bilingual librarian team-up with the Youth Services librarian to offer bilingual storytimes.

Our third initiative works well with our first two initiatives in that the third initiative ensures the library is looking at the whole Phoenix community and not just the adults in the community. Building young readers is an investment into the education of children, which will increase their employability in the future.

POTENTIAL CONFLICTS

Our initiatives require substantial staff time, as well as some additional training, which will put stress on our small staff and already tight budget. This stress will be managed by keeping communication open and flowing within the library, fairly dividing up the workload among staff, and by reaching out into the community for potentially rich resources and partnerships. The first fiscal year will be the most difficult for the library; however, once the year is complete, fulfilling our goals should become much easier as the most difficult part of the work will be behind us.

MONITORING AND CORRECTING

The progress toward our initiatives will be reviewed every three months. If the initiatives are on time and within budget the initiatives will continue. If initiatives are slightly behind and/or slightly over budget the initiative will continue for another three months, but progress will be watched closely. If the initiatives are extremely behind and/or extremely over budget, the library will reevaluate the initiatives and decide whether the initiatives should be temporarily stalled or permanently adjusted.

To keep the initiatives on target, the library staff should frequently consult the action plan timeline.

At the end of the second fiscal year, the strategic plan as a whole will be evaluated and its successes and potential shortcomings brought before the community and library board.

CONTINGENCIES

Several events could threaten the successful implementation of the strategic plan.

Another economic downturn may force farmers and small business owners to close and/or relocate. A rural community such as Phoenix County that depends upon agriculture for its livelihood can lose its income from crops due to drought, pests, or other natural disasters. Such circumstances would negatively impact the property taxes on which the library special district relies. Additionally, continued economic stress or another downturn could negatively impact tourism, Phoenix County's second largest source of revenue.

While it is not possible to predict such matters, as a special district with control over its own budget and the ability to carry funds over into the next fiscal year, the library is in a better position to mitigate the damage of an economic downturn than it was in its past incarnation as a county department.



INITIATIVE 1: INCREASE THE EMPLOYABILITY OF THE COMMUNITY

The initiative to increase the employability of the community relies heavily on cooperation from volunteers and other local community organizations. It is possible that high school students will not be willing or able to volunteer their time to the degree that the library staff would like. It is also possible that Mid-Columbia Council of Governments and Worksource Oregon are not able or willing to partner with the library in its efforts to provide services to job seekers. Based on past experience in working with high school students who are frequent users of the library and past interactions with both agencies, we believe that we will be able to meet our goals with respect to this initiative. Should there be difficulties, it is possible that staffing at the reference desk may be adjusted in order to provide the necessary computer support. The library staff can also explore additional community resources, such as human resources professionals, to provide the guidance that Worksource Oregon and the Mid-Columbia Council of Governments are unable to offer.

INITIATIVE 2: INCREASE SERVICES TO THE LATINO POPULATION

The initiative to increase services to the Latino population is the initiative most at risk. The initiative relies heavily on the addition of a capable bilingual staff person to implement many of the goals. If no suitable candidate for the position is found in a reasonable period of time, the initiative will suffer. The strategic plan currently calls for two staff members to attend a conference on building a Spanish-language collection. This goal can still be met without the addition of a full-time bilingual staff person. The area of greatest concern is the level of service provided to Spanish-speaking patrons, and this will remain a concern until more members of the staff are bilingual.

A second goal of this initiative that is of concern is the recruitment of a member of the Latino community to serve on the library's board. The current library board and the library director are committed to recruiting such an individual, and efforts to do so will continue. The strategic planning process brought the board and director into contact with several members of the Latino community who had not previously been involved with the library, and these connections will be of great help in locating potential candidates.

INITIATIVE 3: IMPROVE YOUTH SERVICES WITH ENHANCED STORYTIMES

The initiative to improve children's services will benefit from support from local businesses to sponsor reinforcements for storytime attendance and support from local schools in promoting storytime, both existing programs and the new program for children with special needs. Our relationship with the schools is very good and it is very likely that they will be supportive of our request for assistance. Should they be unable to assist the library, the children's services staff will seek to improve attendance at storytime by more aggressive advertising in the library and at other community locations. The support of local businesses depends in part on the health of the local economy, although the donations that the library is requesting are not large. Should the library be unable to secure the necessary donations at this time, the staff will consider expanding the pool of businesses approached for donations or revisiting the idea in the next program year.



CONCLUDING REMARKS

The library – like its community – is navigating a time of economic turmoil and change. With our reduced resources, we have focused our strategic plan on what will best support our community’s changing needs. We recognize that a library is something of a luxury for a community whose economic survival is under threat, and our goal is to justify, as well as to continue to build, the support we were given in the passage of the service district.

This strategic plan will help the library make the best use of its limited resources, and to provide a clear outline for the community of our commitment to its needs. Our initiatives focus on the important changes the community is navigating, and they work together in ways that, we hope, will multiply the effects of each. Our board and our staff are dedicated to this effort to expand services to the Latino community, support the efforts of all our patrons as they navigate a new economy, and help educate for a changing world the community’s most important resource, its children.



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APPENDIX

STRATEGIC PLAN RETROSPECTIVE

LI805XO

EMPORIA STATE UNIVERSITY

OCTOBER 31, 2012

Christy Davis

Kathleen Feduccia

Courtney Remington

Kathy Street

Tina Weyland



TEAM PHOENIX NARRATIVE

Team Phoenix was a self-selected team that got to work early, before class had even officially started, met regularly and frequently throughout the project, communicated with one another effectively, and did a tremendous amount of research on the many aspects pertinent to its the creation of a strategic plan for a rural, three-branch library system. This library system was one which was based roughly upon a composite of three actual public library systems in Oregon that, within the last decade, have undergone closures, and then later reopened. Created and written in a time when the national and local economy is still under stress, the strategic plan for Team Library Phoenix was particularly inspired by some real-life libraries that found innovative ways to rise from the ashes after encountering harsh political and fiscal realities.

FORMING:

Although we had all emailed one another several times prior, our first official team meeting took place via Google Hangouts on August 21st. During this meeting our team decided to:

- ❖ Create a consensus agreement, or, 4 out of 5 votes moves decisions forward.
- ❖ Meet on evenings or weekends via Google Hangouts or Adobe Connect.
- ❖ Have a set rotation for meeting facilitation and the taking of minutes, and an agreement that the facilitator was to send out the agenda and Google Hangout invitations, and while the secretary was responsible for posting meeting minutes within 48 hours of the meetings.
- ❖ Accomplish meetings within a 1.5 hour maximum time frame unless more time was critical to the success of moving the project forward.
- ❖ Agree to meet in person when possible (this happened 2 out of the 10 meetings, because of great geographic distances between team members).
- ❖ Set high standards for participation and engagement, as well as actions and consequences for failure to do so.
- ❖ Establish rules of team etiquette, primarily focused on acting like adults in a graduate program of study.
- ❖ Exchange contact information and set rules for length of time to reply to communications.
- ❖ Set false deadlines (minimum 2 days in advance) for all team assignments.
- ❖ Create and sign the team pledge within 10 days of the first meeting.

STORMING:

By the second team meeting, our as-of-yet unnamed team launched quickly into the storming phase of the project. During meetings 2–4 we brainstormed through all aspects of the main body of the class assignment document, threw out ideas for consideration, and accomplished the following goals:

- ❖ Read and then reported, in writing, our opinions of the sample strategic plan documents provided by our professor, and then followed up with a discussion during a meeting, using this to determine the desired style for our plan.



- ❖ Decided that our strategic plan would be created for a medium-sized, rural public library with three branches. This system had lost funding, closed, regrouped and then reopened.
- ❖ Researched the three libraries in Oregon that had closed and reopened during the last decade: Hood River County, Jackson County and Josephine County.
- ❖ Assigned research and interview tasks to team members in order to talk to key current and past members of staff at these libraries and at the Oregon State Library.
- ❖ Established that we would utilize WikiSpaces to contribute data for the project, and assigned font colors for making posts to the wiki.
- ❖ Hammered out preliminary ideas about our library's mission and values.
- ❖ Named ourselves Team Library Phoenix.

NORMING:

During this phase Team Library Phoenix used meetings 5–7 to collate and gather information and to meet for intense discussions of the strategic plan sections via Google Hangouts. Some of these discussions were difficult due to technology issues, but the team forged on nevertheless. This phase compelled us to introduce more detailed information about our library system and its strategic plan. Research continued, based on more library and database discoveries as well as tie-ins to class lectures and assigned course readings. During this phase we became very clear about our library and the direction we were headed with the strategic plan. Key accomplishments during this phase were:

- ❖ Met in person for meeting 5 during the first face-to-face weekend and ironed out key components of the SWOT analysis.
- ❖ Discussed the demographics of our library's constituency, including geography and, characteristics of the population, and, agreed specifically that our plan needed to address a large Latino population that had been underserved.
- ❖ Researched demographics and other web-based documents in more depth to lend a greater air of authenticity to our project.
- ❖ Cooperated to complete all components of part 1 of the assignment, the Team Progress Update.
- ❖ Decided on the three strategic initiatives for our plan.

PERFORMING:

The objectives of this phase were to get the work done and then refine it. At this point research was completed and a focus on creating the product ensued. Specific initiatives were assigned to team members to write and submit. Now that consensus had been reached on specifics and those specifics were recorded in the team's wiki, entire sections of the document were assigned to members to write. The actions in this phase primarily took place during meetings 8-10, and the following accomplishments were realized:

- ❖ Negotiating budgets, and thus priorities, for the various initiatives with the knowledge that library budgets are finite and that compromise and economizing must take place.



- ❖ Creation of a working document where team members contribute the drafts of sections for the strategic plan.
- ❖ Distribution and assignment of work for writing plan sections, editing and formatting of work, and the creation of the group's PowerPoint presentation.
- ❖ Agreement that more rapid turnaround of communication may be necessary to tie up loose ends and polish details for the project's completion.
- ❖ Determination of final false due dates for sections and completed project.
- ❖ Discussion of speaking parts for the presentation.

ADJOURNING:

Library Phoenix had an overall successful experience because all team members were committed to meeting early in the project and to continue meeting regularly and frequently throughout the semester. Although these meetings took up significant time, they were crucial for our team to stay on track and on schedule. These meetings also made it possible for us to hash out, together, the sometimes overwhelming amount of details for our library system and its subsequent strategic plan. As the discussion continued and the sections of the wiki were filled in, the team felt it was watching a virtual yet entirely plausible library system come into focus. This team kept its commitments to one another, communicated regularly and honestly, and learned a great deal about the current realities of public libraries' politics, budgets and, of course, the importance of strategic planning to survive and thrive while serving the information needs of a community.



TEAM MEETING MINUTES

Meeting Minutes

Team #3 (as yet unnamed)

Google Hangouts

Meeting 1

7:45pm, Tuesday, August 21, 2012

Members Present: All (Christy Davis, Kathleen Feduccia, Courtney Remington, Kathy Street, Tina Weyland)

Discussion Topics:

Setting Team Norms and Creating the Team Contract

Decisions: All members prefer consensus but if not possible, 4 out of 5 secures forward movement of group decisions.

Meeting Times: Evenings and weekends are best for the group. At least 1 day notice prior to a meeting, more notice preferred. Meeting duration is expected to be 1 to 1.5 hours. Absolute maximum meeting is 2 hours (unless critical).

Agreed to attempt the following in-person meetings:

Possibility during Community Needs Analysis weekend. Oct. 5th or 6th.

Lunch-time meeting during F2F weekend during lunch break on Saturday, September 22nd.

Attendance: Absence excused for emergencies (family, pet, work and serious illness).

Assignments: Groups prefers minimum 2-day deadline prior to actual deadline to allow for editing and fixing of problems. (see more in *Enforcement* section) Team members will address work that needs to be edited or improved. Although tact is required, work that does not meet standards of the team (consensus?) must be addressed.

Participation: Discuss meeting dates and expectations (agenda items) ahead of time. All members must stay engaged.

Communication: We will use a combination of Adobe Connect and Google Hangouts. (whichever one is working best for most) Google Docs will be used for sharing information.

“Reply All” on all emails to include all team members (unless we’re having a serious problem with a team member who is not responding to communications, not attending meetings or not doing assignments- then other communication channels will commence)

Conversational Etiquette: We are all adults. If someone is dominating the conversation or consistently getting off-track, they will be spoken to by the group or a group member (current facilitator responsible if no one volunteers).



Meeting Agenda & Minutes: Facilitation and secretarial duties of the group will take place in the following rotation throughout the semester: **Every two meetings**, these roles will rotate, and we will repeat rotations if necessary.

Facilitator	Secretary
Kathy	Christy
Kathleen	Courtney
Tina	Kathy
Christy	Kathleen
Courtney	Tina

Meetings will have agendas, responsibility of the facilitator, though subject to group input (for adding discussion items). Agendas should be posted 24 hours prior to meetings when possible.

The secretary is responsible for posting minutes within 48 hours of the meetings. Minutes are subject to revision by group members (with communication to the group via email regarding revisions, additions or deletions).

Enforcement: If a person misses a meeting or a deadline, or turns in substandard work, or does not communicate to the entire team about the reasons for doing so (and with immediate plans for fixing it), either the entire team or one team member (depending, perhaps current facilitator?) will address this problematic performance. This is for the first offense.

If a team member repeats this behavior, the team member will be reported to the instructor immediately so as to remedy or move on from the situation as quickly as possible.

Peer pressure shall prevail and we will speak honestly.

Action items:

- Christy will post meeting minutes by 9pm on 08/22/2012 via Google Docs
- Team members will make suggestions for additions or deletions to the Team Contract by Sunday, August 26th at 5pm. After that, the Team Contract serves as a Team Pledge.
- Kathy will create a Google Doc for voting on type of library/archive/etc we will address for our project, and for throwing out team name ideas
- Agenda will be posted by 08/27/2012. Email Kathy items for agenda prior to this date
- Tina will contact Rajesh to set-up Adobe Connect Room prior to our next meeting

Next Meeting: Tuesday, August 28th, 6:30 pm. Adobe Connect



Facilitator, Kathy, Secretary Christy

Meeting Minutes
Team #3 (as yet unnamed)
Google Hangouts
Meeting 2
6:30pm, Tuesday, August 28, 2012

Members Present: All

Discussion Topics:

Housekeeping

All have “signed” team contract/pledge in Google Docs

Determined that facilitator will be the person to send Google Hangout or Adobe Connect invitations

Preliminary discussion of Strategic Plan

Began discussion of the Current Reality aspect of our faux organization in which the strategic plan will be created.

Some of the ideas entertained were:

It’s a public library

It’s roughly modeled after Hood River

A tax measure for the library failed because the taxpayers were feeling stressed

Local agencies came together with ideas for a plan and a budget for the now-closed library

People who lost their jobs at the closure moved on to other library jobs elsewhere or retired if they were close enough of age to do so

All new staff now has to forge community partnerships

Large influx of Hispanics to the area

Some actual information about Hood River from census data includes:

15% increase in non-farm employment

Some things we want to know about this community:

It’s literacy rate

If it has had an increase in veterans

What sorts of changes are revealed in the differences between the 2000 and the 2010 census

What size of staff will this library have?

Who are some potential stakeholders?:

Possibilities mentioned included community members who are taxpayers, small business owners, families, the school system, a community college, medical facilities, local government, farmers, any light or heavy industry



What might some of this community of library users hold as key values?:

Youth literacy

Lifelong learning

Efficient use of funds

That a well-informed citizenry leads to a better functioning democracy

Customer responsiveness

Responsible stewardship of taxpayer funds

Imagination (cribbed from Hood River)

One potential name offered: Feisty Phoenixes

Action Items:

Reading

Each team member carefully read two of the Strategic Plans Rajesh has posted in Bb

Courtney - Wilkinson, WSU

Kathleen- WSU, Tri-County

Tina - Tri-County, Wilkinson

Kathy - Fleur-de-lis, Vista

Christy - Fleur-de-lis, Vista

Everyone: Read the Hood River Library pages online

Research

Christy - talk to June, former Hood River director

Kathy - talk to Buzzy, current Hood River director

Courtney - talk to her contact at the Jackson County Library Foundation

Kathleen - try to contact someone at Josephine County Library

Tina - ask Perri for some names of other libraries that have shut down and reopened - contact one

Christy - Create Google Doc to input insights about Strategic Plan samples and to report of findings of libraries that closed and reopened

Next Meeting:

Sunday, September 9th, 5:30pm. Google Hangouts

Facilitator, Kathleen - Administrative Assistant, Courtney

Facilitator Kathy, Secretary Christy

Meeting Minutes

Team #3 (renamed Team Library Phoenix?)

Google Hangouts



Meeting 3
6:45pm, Monday, September 10, 2012

Members Present: All

Discussion Topics:

Main Comments on the Example Strategic Plans

Some seemed to run a little long. Less is more.

Need to be clear about the supporting information and the resulting plan.

Keep track of becoming too repetitious.

Keep a balance between text and images or graphs.

Group Strategic Plan Brainstorming thoughts

Do we want to model our fictitious library after Hood River as it is or as Hood River before with a city budget again?

Discussions of different types of Oregon Library budget systems:

County/City-handles contract with maintenance, payroll, etc

Special District-Libraries have to consider what to set aside for landscaping and facility maintenance.

Service District-under the umbrella of the local government, but you have dedicated funding. Library pays overhead charges to the County.

Library Scenario

A fictional library that closed and reopened as a special district, been open for a year, maybe two, and now we need to make a strategic plan for the budget for the upcoming 12 months. How do we sustain the library? How do we improve services for senior citizens, or Hispanic population, or youth?

What we like about our library being a part of a special district is that there are enough libraries in Oregon a part of a special district that they have their own insurance that they can buy into.

How many goals/initiatives do we want to have? We have to have at least two but what should be our cap? We want to pick goals we can do within 12 months.

Our library got enough support to reopen, so what promises did we make to our supporters?

Our thoughts on how to work on the plan

How do we want to divide up the work?

We don't want to divide too much and not have a cohesive plan.

We want to encourage constructive criticism

We will have frequent meetings and then go on and work on individual pieces.

Action Items:

Assignments/Documents



Kathleen will set-up Wikispaces wiki.

Everyone keep adding thoughts to the wiki and we will pull our strategic initiatives from that.

Track our references on the wiki.

Check the wiki as often as you can, and contribute something about every other day?

For the wiki we will use color-coding for our thoughts and comments.

- o Tina-Green
- o Kathy-Purple
- o Courtney-Red
- o Kathleen-Blue
- o Christy-Pink or Orange

Deadline for Posting to Google Docs and the Wiki—24 hours before meeting. Well, at least by 8pm the evening before. If posting later than that, send an email letting group members know.

Have everything posted by 8pm Sunday the 16th!

Next Meeting:

Monday, September 17th, 7pm. Google Hangouts

Facilitator Kathleen, Secretary Courtney

Meeting Minutes

Team Library Phoenix

Google Hangouts

Meeting 4

7:00pm, Monday, September 17, 2012

Members Present: All

Discussion Topics:

Our Library

We want to base our library and community demographics off of Hood River, with maybe a few tweaks.

We need to do more research about the library and community to develop a solid foundation of information.

Our Library's Mission & Values

We need to narrow down our values to around 6.

Some of the values can be put into categories.

Good stewardship of resources is an important value to keep, especially since our fictions library



closed.

We need to add “Transparency of all Operations” as a value.

Action Items:

Kathy will change her font color in the wiki to black.

Research:

Christy will talk to June about why library measure failed.

Kathy will talk to Buzzy about why library measure failed.

Kathleen will look at old Oregonian articles to find out what was going on around the time of the election.

Kathleen will look into the Hood River Library staff and input the information she finds into the Current Reality page of the wiki.

Tina will email some Latino organizations to see what information she can find about the library and the election.

Assignments:

Tina will do some preliminary writing of the mission and values section.

Christy will bring ledger paper to face-to-face meeting.

Everyone: Look at the blank pages of the wiki and fill in some ideas.

Everyone: Put ideas into the whole wiki.

Next Meeting:

Saturday, September 22, 1:45pm face-to-face.

Facilitator, Kathleen, Secretary, Courtney

Meeting Minutes

Team Library Phoenix

In Person PSU

Meeting 5

1:45 pm, Saturday, September 22, 2012

Members Present: All

Discussion Topics:



Lecture

We discussed what Professor Singh stressed about the strategic analysis in class.

SWOT

We started working on a Strength, Weakness, Opportunities and Threats (SWOT), analysis of the library district

Strengths

Rebranded library

Supportive Community--voted in favor of district

Demonstrated wish for library

Dedicated Staff

Dedicated Board

Zero debt

Good Infrastructure

Ability to hold excess \$\$ from previous budget

Weaknesses

Limited Staff Resources

Limits of services available

Aging Technology

Limited tech infrastructure

Limited connections and support for Hispanic community

Opportunities

Increase in partnerships

Potential Grant Funding

Targeted Services

Revived awareness of the library

Develop volunteer base

New industries in county: Biomass and Casino

Threats



% of population disenfranchised

Limited time to prove worth

Operating under a microscope

Hispanic community does not feel represented by staff, on board, or adequately served

Natural Resources Eco Threats that could affect tax base: Pine Beetle Infestation, Fruit Flies, Bee Colony Collapse

Rising fuel costs impact tourism negatively, resulting in potential local business downturn

Broadband availability, speed is determined by number of users. Possible system crashes.

Library Names

Team discussed possible names of branch libraries. It was determined that we will select fictional names based on fictional birds. Possible names:

Peregrine

Thunderbird

Griffin

Dodo

Action Items:

Tina: Research Latino population in Hood River County

Kathy: Contact Buzzy for additional input

Christy: Contact June for additional input

Kathleen: Search Oregonian archives for pertinent articles

Courtney: Search for anything that may pertain to the project

The team will check in by email with each other on or before Tuesday September 25 to report progress.

Next Meeting:

Tuesday, October 2, 2012 6:45pm. Google Hangouts.

Facilitator, Tina, Secretary, Kathy

Meeting Minutes

Team Library Phoenix

Google Hangouts

Meeting 6

6:45 pm, Tuesday, October 2, 2012

Members Present: Christy, Courtney, Kathleen (Recorder), Tina (Facilitator)

Absent: Kathy (Excused - absent due to birth of granddaughter - Congrats Kathy!!)



Discussion Topics:

Oct 7 assignment - Tina will start a Google Doc for all to contribute to by Friday. Tina will turn in the assignment.

Finalize values - The values page on the wiki is fairly complete and the rough groupings that Tina used work. This page is sufficient to go to draft.

Finalize SWOT - Our in person meeting covered the SWOT analysis very well. Kathleen will add the SWOT to the wiki and team members can review and add to it over the next few days.

Finalize "story" - We are all in agreement regarding the back story of our library. Our plan must make clear the connection between the current situation and our strategic goals (community needs analysis, user and non-user surveys).

Establish objectives (strategy, action steps, outcomes) - One of our objectives should focus on the Hispanic community. A possible second objective could be something around jobs or job seekers or some outreach to those community members who are not heavy users of the library.

Action Items:

Tina to post document for Assignment One in Google Docs. All team members should contribute to it by Friday. Tina will turn in the assignment.

All team members to work on the wiki.

Next Meeting:

Saturday, October 5th, 5:00 pm at PSU

Facilitator, Tina, Secretary, Kathy

Meeting Minutes

Team Library Phoenix

In Person – PSU

Meeting 7

5:00pm, Saturday, October 6, 2012

Members Present: All

Discussion Topics:

The Current Reality page of the Wiki does not have any information on it. We need to include some notes about our organizational scan and gap analysis. Kathy will work on it in the next few days and include some information regarding our community survey.



Strategic Initiatives: We need to decide on at least two, not more than three and use the SMART goal approach.

Strategic Initiative One: Increase services to Latino population

1. Develop Spanish language collection. More Print and AV Spanish and bilingual resources
2. Develop Spanish language resource page on our website.
3. Attempt active recruitment of member of Latino community volunteer to library board.
4. Our next new hire (upon upcoming retirement of current employee) will PT bilingual preferred individual to work in Reference and Adult Services. The new position will be available to assist patrons with job search and will focus on outreach to Latino community.

Strategic Initiative Two: Increase employability of community

1. Provide Computer skills classes
 - Basic skills classes provided by reference staff
 - Recruit high schoolers to volunteer their time in providing computer help
2. Online job searching help - reference staff
3. Aid for resume creation and mock interviews - partner with Worksource Oregon and MidColumbia Council of Governments.
4. Sponsor job fair at the library

Strategic Initiative Three: Improve Children's Services

1. Add a twice a month storytime for children with special needs at the main library
Send youth services librarian to training for storytimes for special needs children
2. Increase sponsorships for summer reading programs

Next Meeting:

Tuesday, October 9th, 6:45. Google Hangouts

Facilitator, Christy, Secretary Kathleen

Meeting Minutes

Team Library Phoenix

Meeting 8

Google Hangouts

6:45pm, Tuesday, October 9, 2012

Members Present: All

Discussion Topics:

Writing Initiatives -We agreed that it was time to begin writing our strategic initiatives and that it was more efficient to assign parts and bring them back to the group for discussion. Because Initiative One and Two are larger, two people will work on each of those. Our fifth group



member will handle initiative three. Kathy requested Initiative Three as it applies to Youth Services which is her area of interest. Kathleen and Christy volunteered for our employability initiative. Tina and Courtney will handle the initiative for Latinos. We will begin the strategic plan in Google Docs though no one will edit anyone else's section.

Our plan for the rest of the project is to have the initiatives done by Oct. 16th. By Oct. 23rd, the rest of the plan will be written. By the 26th or 27th, we will have the final document.

Budget - The team also discussed the best way to prepare the budget. Our largest budget item will be the new employee to focus on the Latino community. The team agreed that one of our existing full-time employees would be retiring and the replacement would fill the new role. Our work on the strategic initiatives should give us a solid idea of the items to be included in the budget.

Action Items:

By next Monday, Oct. 15th, work on initiatives will be posted for the rest of the group to review.
Employability Initiative - Christy and Kathleen
Latino Initiative - Courtney and Tina
Youth Services Initiative - Kathy

Next meeting: Tuesday, October 16th, 6:45pm. Google Hangouts

Facilitator, Christy, Secretary Kathleen

Meeting Minutes
Team Library Phoenix
Meeting 9
Google Hangouts
7:00pm, Monday, October 15, 2012

Members Present: All

Discussion Topics:

Finalized - initiatives, and discussed timelines and budgets.

Assignments for the final plan and presentation were decided. Section drafts (building on the writings in the wiki and in the Drive document) will be posted to Google Drive (in Kathleen's most recent document) by Oct. 23rd, for review by teammates. Again, no one will edit others' work without discussion.

Action Items:

Assignments are as follows:



Executive Summary - Tina
Organizational Profile - Christy
Preparation & Planning - Kathleen
Current Realities - Kathleen
New Priorities - Courtney
Action Plan - Courtney
Contingencies - Kathleen
Concluding Remarks - Tina
Summary Report of Team Activities - Christy
PowerPoint - Kathy
Team Participation - each individual must submit independently

Teammates will have a few days after the 23rd to discuss the plan, and Tina will format a Word document and do a final edit on the weekend of Oct. 27-28.

Next meeting:

Friday, October 26, 6:30pm. Google Hangouts

Facilitator, Courtney, Secretary, Tina

Meeting Minutes

Team Library Phoenix

Meeting 10

Google Hangouts

6:30pm, Friday, October 26th

Members Present: All

Discussion Topics:

The meeting was devoted to a thorough review of the document, and outstanding issues were resolved. Final drafts will be completed by Saturday. Tina will edit and format the document, and team members will have a few days for review and final adjustments before the document is submitted on Tuesday or Wednesday.

Kathy will begin work on the presentation. Team members will approve it via email. Each team member will present the sections of the strategic plan that she wrote.

The team will meet Friday before class for a final review and rehearsal of the presentation.

Next Meeting: Friday, November 2nd, 5pm. PSU campus

Facilitator, Courtney, Secretary, Tina

