Strategic Planning Development for Jackson County Library Services (JCLS)

Part One: Purpose Statements, Literature Review, and Environmental Scan

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Abstract

The following report is part one of a two-part strategic plan targeted at the Jackson County Library Services (JCLS) consortium, as well as the overseeing body, the Jackson County Library District (JCLD). Part one will include a literature review investigating the role of mission statements in strategic planning for libraries. The literature reveals the symbolic nature of a public library’s mission statement terminology and how it represents the program going forward. The second section of the analysis presents an updated version of the mission, vision, and value statements for JCLS, followed by an evaluation of the current library systems’ strengths, weaknesses, opportunities and threats.

*Keywords:* Jackson County Library Services, public library, mission statement, community, SWOT
Strategic Planning Development for Jackson County Library Services (JCLS)

Part One: Purpose Statements, Literature Review, and Environmental Scan

Jackson County Library Services (JCLS) is a library system based out of Jackson County, Oregon. The main library is located in the city of Medford, but the JCLS system includes a total of 15 libraries throughout the county. To help us understand this library system in particular we have relied on Rebekah DiBianco, a library worker at the Eagle Point branch, as an important and valuable resource. Rebekah has been able to give us an inside view of the library, which only a staff member has access to. Each library is considered a resource center that supports lifelong learning, education, and leadership for the community. The communities JCLS serves are widely diverse, so it is essential to review this system’s strategic planning and ensure all patron’s needs are being met. JCLS is the primary library system used by the general public, small businesses and staff.

Strategic planning considerations for this library system address the library’s need to continue branching out and strengthening its ties with the community. In order to meet that need JCLS should provide updated and relevant technology, as well as maintain a positive image throughout the community. This understanding is essential to the creation of a new mission and vision for JCLS going forward. Based on the findings of an environmental scan and SWOT Analysis, we reassessed and reconstructed the mission, vision and values of JCLS to better guide the actions of library staff and serve the communities of Jackson County.

Literature Review

Patrons who are not aware of what librarians do, wonder and ask, what do they do with their time? The same answer is given without hesitation, “We run a business.” After the initial shock wears off the patron is left puzzled due to receiving an unusual answer. Then this question
follows from the patron, “So, you know Dewey, right?” As annoying as it is, this proves that the public has no idea what it takes to run a successful library. This is not to suggest that the public is unintelligent; however, there is a level of ignorance that libraries face which stems from the old-fashioned stigma of quiet mannerisms, docile procedures of check-in, check-out, shelving, and fielding basic collection questions from children and adults alike.

Whether the boundary of the facility resides in a school, entire arena, a small town, or a big city the mission statement of the library is critical towards the image, legitimacy, and overall success of its operations. One point of difference between the CEO (Corporate Executive Officer) of Yahoo, Marissa Mayer, and a branch manager at a public library is that Yahoo is a for-profit publicly traded company. A branch manager most likely oversees the public library space. A branch manager or supervisor is in charge of a budget, acquiring materials (print and digital), organizing a staff, and acts as a leader in community relations. The target audience is a vast and wide non-discriminatory pool of patrons which range in age. Yahoo’s target audience is also vast and wide, although, there are factors that illustrate the functioning elements of the library in which a mission statement can be critical in terms of the overall image resonated from public opinion. Successes or failures are representative of the amount of state funding received. Yahoo has billions backing it.

This review will tackle various schools of thought on what the target of mission statements are in a public library setting and how the vernacular can be proactive for the benefit of the institution. Focusing on the vision of the center and instilling these characteristics that will be discussed in this review: values, trust, passion, community, and an engaging online community. Additionally, a part of the review will be dedicated to expressing the role of technology and the importance of its implementation, supervision, and conformity within the
process of lifelong learning for patrons. The ultimate purpose of this literature review is to educate public library bodies on the development of effective mission statements. Correctly expressing their points of view within their mission statements is critical in order for the library to be a continuous vital machine of public information emphasizing the need to provide community awareness, and an overall structure that supplies productive lifelong learning tools and resources, in both print and digital formats.

Values and Trust

Quebec Librarian, Dominque Gazo refers to “missions” in her article (2011) as, “more complex than they appear initially” (p. 55). In an article discussing the use of mission statements in the library setting, Jaeger and Fleischmann (2007) write: “The unique values embraced by public libraries have not only shaped the missions of libraries, they have influenced popular opinion surrounding public libraries and fostered the confidence that communities place in them as a source of trusted information and assistance in finding information” (p. 34). In Gazo’s article (2011) uniqueness is an apparent trait as well, “Several values are consensual: democracy, intellectual freedom, privacy, stewardship, literacy and reading, and aesthetic values are largely accepted” (p. 54). Values are important when constructing a mission statement or, in this case, creating a strategic plan that re-evaluates an already existing mission statement, “Values tie together how individuals think about the world and how they feel about the world” (Jaeger & Fleischmann, 2007). A section of Gazo’s research is dedicated to value assessment by the assignment of roles in which the library is intended on playing. Some of the roles that Gazo includes are: “community activities centers, community information centers, formal education support centers, independent learning centers, research centers, and preschoolers’ door to learning” (p. 55). Therefore, the mission statement must adhere to those roles.
The meaning of trust is also highlighted in Jaeger and Fleischmann’s (2007) journal article. They support their research by the use of outside scholarly articles, such as, *Our Enduring Values: Librarianship in the 21st Century* from former ALA (American Libraries Association) president, Michael Gorman, “Even in a climate where trust can be precious commodity, public libraries are trusted by their communities” (p. 36). “Gorman argues that there is a direct link between the values of libraries and the trust that is instilled within them by the public” (p. 36). Stating that one important mission for ensuring the survival of libraries and librarianship is “assuring the bond of trust between library and the society we serve by demonstrating our stewardship and commitment, thus strengthening the mutuality of the interests of librarians and the broader community” (p. 36). Gorman is quite incisive by connecting librarians to the community because those who serve the public library, including the manger/director, are also considered community members. Therefore, trust is paramount. Even though trust is not a piece of the mission statement, trust as a trait, should be brought to life indirectly within the mission statement.

However, in Jaeger and Fleischmann’s article they address an issue about trust, as its fatal flaw happens to appear within technology. “The trusted role of protecting users’ personal information may create conflicts with the other social responsibilities of public libraries” (p. 36). The authors continue “As a result of a lack of preparedness of some librarians to deal with privacy issues, it is possible that the trust that research shows users place in libraries is not fully repaid” (p. 36). The researchers refer to the U.S. Patriot Act (2002) as a stumbling block in maintaining the public trust. “Further, the changes in the law following the 9/11 terror attacks that have increased the ability of the federal government to track patron activities in public
libraries, such as through the USA Patriot Act, have raised serious concerns about privacy and freedom expression among many public library patrons and librarians” (p. 36).

Mission or Vision?: The Underlying Purpose

This part of the review tackles the meaning behind the usage of the phrase “mission statement.” Should librarians approach this document as a mission or a vision? Evans and Alire break down both types of statements in their textbook *Management Basics for Information Professionals* (2014). Using one and/or another in a document is at the discretion of the library’s manager/director or library board members. Which one is more effective in terms of a stronger voice?

The distinction between “mission” and “vision” is in the phrasing. One is general. One is articulate. “Essentially a mission statement is the organization’s very long-term strategy” (Evans & Alire, 2014, p. 89). This comments on the potential for success of the library program “For a strategy to be useful there must be congruity between the organization’s capabilities and its operating environment” (p. 89). Like a mission statement, the vision is created for long term usage. Although, the contrast lies in the futuristic tones of the purpose, “A good vision statement is articulate, compelling, exciting, and challenging” (p. 92). Continuing “It paints a broad picture of how the library will or should operate at some point in the future” (p. 92).

The flaw of a mission statement could stem from its vagueness. Evans and Alire quote researcher, Peter Gow, on the notion of vague language “Many of today’s school mission statements are so general and so alike that they fail to differentiate themselves and the schools they represent reducing most noble aspirations to banalities” (p. 91). Even though he was discussing school libraries, the same can be said for public libraries mediocre attempt at a
mission statement. With all of the evidence it is imperative that a library manager/director should construct both mission and vision statements.

Linda K. Wallace, a former director of the ALA’s Public Information Office, wrote in 2003, a handbook, titled, *Libraries, Mission, and Marketing: Writing Mission Statements That Work* on writing an applicable and effective mission statement, which could be used by any type of library service providers, “Most libraries don’t have a communication plan” (p. vi). She correlates a mission statement to be a promotional tool, moreover, a defined outline for marketing purposes. Along with Wallace, information systems specialist in Monroeville, PA, Janet L. Balas, equates a mission statement to that of a marketing device. In her article (2007) located in *Computers in Libraries* she expresses “Administrators need to have a clear vision of the library's mission in order to make consistent decisions on new programs and services” (p. 31). She uses literature from the OLC (Ohio Library Council) to prove that there is a close relationship between that of a mission statement and actively marketing the library. “The Ohio Library Council also understands that a clear mission statement is essential for effective marketing” (p. 32). She exclaims that “Writing a mission statement is difficult, especially today when the need for libraries is being openly questioned” (p. 32). Balas concludes with the notion of marketing while devising a mission statement, “Successful marketing also requires understanding the organization’s mission, since it would be almost impossible to “sell” a service if you could not explain its value” (p. 32). Adding to it “A good mission statement is one that makes us feel our corner of the world is a better place because of the library” (Wallace, 2003).

According to both Balas and Wallace, a result can be made that there is a human element to drawing up a library mission statement. We have to grasp the very joy of stepping through the
entrance. Providing a reason as to why patrons come to the library in the first place. If we are selling a product, the merchandise is learning.

**The Hedgehog Concept**

Digging deeper into the justification of a mission statement lies within the writings of Jim Collins in *Why Business Thinking is not the Answer: Good to Great and the Social Sectors: A Monograph to Accompany Good to Great*. Collins is a faculty member at Stanford University’s Graduate School of Business. In 2005 he wrote this monograph about businesses in the social sector who were searching to be great, not just good. Keeping in line with the mediocrity descriptor, Collins opened his document by dissecting the foundation of business models. Taking a quote from a CEO of a reputable home building company, David Weekley, states that “In his work with nonprofits, I find that they’re in desperate need of greater discipline---disciplined planning, disciplined people, disciplined governance, disciplined allocation of resources” (p. 1). Unfortunately, with the takeover of some libraries via privatization, the control is taken out of play. Library directors/managers are left to struggle when it comes to manners of discipline in the workplace because the library director/manager must answer to a higher authority. In association the power is taken away, thus restraining managers of true delegation.

By administering Collins’ “good-to-great” terminology there are specific “issues” he addresses in sections throughout the monograph. “The Hedgehog Concept” touches upon the themes designated in the focus of this review, mission statements. “The essence of a Hedgehog Concept is to attain piercing clarity about how to produce the best long-term results” (p. 17). There are three circles of reflection. These circles can assist a director/manager to find supplemental meaning in a mission statement. The circles include the following assessments:
“What you are deeply passionate about, what you can be the best in the world at, and what best drives your economic engine” (p. 17).

**Technology: Raising the Stakes**

“Libraries have diversified,” says Balas (p. 30), by which she is referring to technology. “It’s a topsy-turvy world now with cafes and the Internet in libraries and books in cafes and on the Internet” (p. 30). Ted Conine and Mark Babbitt are savvy tech experts who have recently (2014) written a book titled, *A World Gone Social: How Companies Must Adapt to Survive*. Babbitt is the founder of YouTern an online community for young professionals to: communicate, make connections, and land internships. This book can benefit a library director/manager’s vision of how technology can catapult the institution into the digital age and legitimize the libraries’ functionality as a force in the community. One chapter of theirs in particular resonates with this literature review, chapter six focuses on community. Adding more importantly, that technology should be a high-ranking ingredient of the mission statement when it comes to online communities, “The best online communities leverage existing success, develop further trust, build exponentially more human relationships with existing and potential customers, and then exceed expectations” (p. 64). The greatest service to a well prepared mission or vision statement is the careful attention given to the segment on technology. Is having a Facebook, or Twitter account enough to advertise and promote growth?

Conine and Babbitt extends to its readers the expression of critical community awareness. In this case, technology will not only engage community members, but also “build the brand” (p. 68). “Some of the greatest online communities promote the best aspects of what your authors
believe the Internet was meant to be: a place to share and learn” (p. 71). “By sharing knowledge and best practices, the community grows, collectively. As the community grows, its members become mentors, teachers, and accountability partners.” (p. 71).

**Conclusion**

A library is a place of discovery, community, and shared learning. The challenge is for an organization such as a library, who is nonprofit, to create an identity unlike any other entity in the community. According to Gazo (2011) “The public library is the most used cultural service in Quebec” (p. 57). Unfortunately, the main ideas of “community” and “values” get lost in the shuffle when politicians or outsiders are in control. Libraries are not cash cows. Librarians are capable directors/managers who are able to use mission statements to reinvent the ultimate vision of the center and instilling the characteristics discussed in this review: values, trust, passion, community, and an engaging online community.

**Jackson County Library Services Mission, Vision, and Value Statements**

**Mission Statement**

Jackson County Library Services’ mission is to promote and enable lifelong learning and informed decision-making for individuals of all ages and backgrounds. This is to bring together and strengthen the diverse communities that JCLS serves. To accomplish this mission JCLS performs five primary functions: 1) provides patrons with free access to high-speed Internet and other technology and communications materials (e.g. computers, printers, fax machines); 2) advocates education and literacy for patrons to help enrich their personal goals and make everyday tasks easier; 3) creates and maintains a safe, accessible, and relevant environment for all patrons to work individually and collaboratively with each other and staff members; 4) helps
expand the reach of education, learning, and reading to preschool children and youth; 5) maintains the library as a leader and positive contributor in the community.

Vision

The vision of Jackson County Library Services is to be a central technology resource and to provide services for all its diverse community members and their various information needs. Our vision is to broaden our technology resources to accommodate a wider audience of patrons who rely on the library as a sole means to the Internet and online services. Also, in order to meet our diverse patron needs we aim to make library services more available beyond the physical library buildings through outreach programs, partnerships with other community members, and integrations with local community subgroups. Strengthening our community relationships and providing centers of technology, entertainment, and education will ultimately set JCLS apart from other library systems.

Values

At the center of all Jackson County Library Services’ activities are certain fundamental values. These values inspire JCLS to reach our goals and unite us as one unit within the community. They help us to make a difference in people’s lives every day and to maintain our mission to promote and enable lifelong learning and informed decision-making for individuals of all ages and backgrounds. Our values are as follows:

**Fair and reliable access to information and education:**

- Ensuring confidential use of the library and a right to privacy.
- Providing materials in both print and digital formats that encourage and contribute to the activities of personal development, education, and cultural programs.
· Providing resources that allow patrons to discover new topics and personal interests for lifelong learning.

Service:
· Responding to patron’s questions and information needs with integrity, courtesy, and urgency.
· Maintaining a collection that meets the diverse community needs and wants in both physical and online spaces.
· Creating a healthy and comfortable work environment for both patrons and library staff alike.

Value staff and involvement of the public:
· Working together as a community between library staff and patrons to create positive contributions to society.
· Empowering staff members to maintain high ethical standards and achieve exceptional results by providing a professional fulfilling environment.
· Treating each other with equality, respect, and dignity.

Environmental Scan

Political and Economic Trends

A major political and economic marker in the history of JCLS was the shutdown of the entire library system in April of 2007. The general sentiment was apparent by Ted Stark, past interim library director, “I wish we could call FEMA: this feels like a natural disaster to me” in Meredith May’s (March 4, 2007) article titled “Largest Library Closure in U.S. Looms”. The events leading to the closure can be traced all the way back to 1908 when President Theodore Roosevelt seized 2.4 million acres of illegally acquired land from the Oregon & California Railroad (“Owls”, p. 430). The seizure removed more than half of all the state of Oregon’s taxable property and decreased the amount of revenue collected from timber operations on those
lands (Darling, 2007; “Owls”, n.d., p. 430-431). To help make up for the loss, the federal government split proceeds from the sale of the timber with the affected counties, which they then used for community services like libraries (“Owls”, p. 430).

Things were going relatively well until the early 1990’s when the northern spotted owl was declared a threatened species. In order to protect the owls’ habitat the forests were designated as species preserves, leading to the halt of more than 98% of all timber operations (“Owls”, p. 431). In lieu of timber payments, the federal government began providing smaller, short-term “owl” and “safety net” payments to allow counties time to find new sources of revenue (Darling, 2007; “Owls”, p. 431). The subsidies were reauthorized annually for 15 years but then in 2006 they were discontinued by President George W. Bush.

Unfortunately, Jackson County hadn’t yet discovered how to fully replace lost timber revenues. The losses from the federal subsidies translated into a $23 million dollar shortfall for the county overall and a $7 million dollar shortfall specifically for the libraries (May, May 17, 2007). The county struggled with the decision of where to make cuts and they reluctantly decided to close the libraries to help mitigate other cuts in public safety and transportation services (May, May 17, 2007).

On April 7, 2007 all fifteen libraries were closed. Earlier, in June of 2000, voters had approved a $39 million bond dedicated to the construction of new libraries and the renovation of existing ones (Aldous, 2006; “Libraries for All - FAQs”, 2014). That bond doesn’t expire until the year 2020, so if the libraries did not reopen, the buildings would essentially go to waste without separate funding to operate them (“Libraries for All - FAQs”, 2014). Fortunately, the county considered and accepted a contract bid from Library Systems and Services, LLC (LSSI),
a private, for-profit company that manages many libraries across the nation (LSSI, 2013). Six months later, the libraries reopened but with significantly reduced hours of operation.

The LSSI contract alone does not guarantee the libraries will stay open. In fact, the county put JCLS back on the chopping block for the year 2015 unless an alternate funding source was secured (“Proposed Countywide”, 2013). Thanks to voters passing a measure in May 2014 to create a special library district with taxing authority, the libraries will indeed remain open (Darling, 2014).

**Community Demographics and History**

There are assorted demographics for this area including who and what has impacted the area directly and what kinds of entertainment and attractions interest the public in the county. Starting with the U.S. Census data (2015), Jackson County covers approximately 2800 square miles with a majority white population, but also a large Hispanic community in White City and Talent. The county’s principal industries are health care, agriculture, lumber, manufacturing, and tourism. The counties total population is approximately 208,000, the sixth largest in Oregon, and the main town is Medford which is where the main library is located. According to the Jackson County official website (2015), the county was officially established by the Territorial Legislature in 1852 and currently has 11 cities and 34 unincorporated communities. The largest employer is Harry and David, a gourmet gift business that includes a “Fruit of the Month Club”; it is headquartered in Medford with more than 2500 year-round and 8000 seasonal employees.

The county has one institute of higher learning, Southern Oregon University (SOU) in Ashland. SOU is a public liberal arts college offering programs in criminology, natural sciences, Shakespearean studies, and theatre arts programs. Students publish a weekly student-edited
paper called *Siskiyou*. In addition, they have a nationally-distributed literary magazine published annually called *West Wind Review* (Southern Oregon University, 2015).

Jackson County is also home to various media outlets, including Jefferson Public Radio (JPR), the local branch of National Public Radio (NPR). There is also the Rogue Valley Community Television (RVTV), a public access cable TV station, which hosts locally produced community entertainment programs and broadcasts county council meetings to help keep constituents informed and active in local politics (Southern Oregon University, 2015).

In the arts, Jackson County has several offerings including the internationally famous Oregon Shakespeare Festival (OSF) in Ashland which is celebrating 80 years this year. It operated from February to November producing 11 plays on 3 stages with an approximate attendance of 400,000 (Oregon Shakespeare Festival, 2015). If you like music, the Britt Music and Art Festival is the Pacific Northwest’s premier outdoor summer performing arts festival in historic Jacksonville featuring world-class artists in classical, jazz, blues, folk, bluegrass, pop and country music (BrittFest, 2015).

**Technological Factors**

Free to all residents of Jackson County, the large library system is a community hub with rural branches serving many different roles including educator, book club meeting house, and a place to meet and converse with a friendly face. Most of the computers the county owns are at the main branch in Medford with the other branches making do with older models. The computers are mostly used for job hunting, emails, and entertainment purposes with thirty minutes per patron being the norm. Although these rules are set by branch managers and are not standard system wide. A handful of I.T. professionals handle all technology related problems.
(DiBianco, personal communication, 2015). The county has free Wi-Fi for use in all county owned buildings (Jackson County Oregon, 2015).

SWOT Analysis

Strengths

Jackson County Library Services has many strengths that should be continued and allowed to flourish. One of the greatest strengths is the flexibility offered to patrons through the maintenance of a floating collection. This allows each library branch to share the same catalog and library materials, or “float” materials from one branch to another. With a floating collection patrons can place holds on items from any library and have them sent to the branch of their choice. To acquire materials available outside of the county, patrons have the option to pay five dollars for an interlibrary loan facilitated through WorldCat (Prinsen, personal communication, March 1, 2015). Additionally, patrons can request for JCLS to purchase and add materials to the collection.

Many of the strengths found at JCLS have to do with the wide array of programming and information services. A major highlight is their children's early literacy advocacy and programming. Advocacy is defined as "a process for attempting to influence public policy and resource allocations" (Evans & Alire, 2013, p. 263). JCLS actively advocates for children's development and literacy throughout the community on a continuing basis. The libraries offer several free programs including babies, wobblers, toddlers and preschool story times, educational speakers, aerobics, crafts, and plays (JCLS, 2015). A related program is the weekly, theme-based traveling story time bag that contains a carefully selected mix of materials such as books, songs, craft and activity ideas, felt boards, and puppets. Children's librarians use the bags to design their story time programs each week (DiBianco, personal communication, March 1, 2015). JCLS also
has a long-standing partnership with the local non-profit Storytelling Guild, which helps promote early literacy through a variety of means including annual Children's Festivals (Storytelling Guild, 2014).

There are many other free programs and information services provided by JCLS as well. The outreach program collects and brings books to children in need and to the home-bound. Both youths and adults can attend free events such as the Learn-a-palooza, family movie nights, guest speaker presentations, and classes.

JCLS has strong connections with the community. All branches receive great support from the Jackson County Library Foundation and several Friends of the Library groups, who run book sales that provide a major source of funding for many library programs. JCLS also partners with Barnes and Noble and a few local bookstores for prizes during summer and winter reading for both children and adults (Prinsen, personal communication, March 1, 2015). There is free access to technology such as Wifi, computers, printer/copier, databases (e.g. Mango, Genealogy, A to Z, GED study guides), and Library-to-Go. Study rooms and community rooms are available for the public even if they do not have a library card.

The library facilities are staffed with dedicated, knowledgeable, and enthusiastic librarians and each branch has their own unique atmosphere. Everyone who steps into the library is greeted by friendly and experienced staff (DiBianco, personal communication, March 1, 2015). The libraries are either brand new or well-maintained buildings that reflect the area and feel of the city. For example, Eagle Point Library was built in the last six years in a craftsman’s style which reflects the small, quaint, and woodsy city. The bigger city in downtown Medford has a new, modern/industrial feel to its design.

Weaknesses
With JCLS’s strengths there will be weaknesses. These weaknesses can be profound and detrimental if not addressed. Some of these weaknesses include funding, budgeting, fluctuating staff, lack of resources, and low staff morale. According to the Jackson County Library District, the total library budget for the 2014-2015 fiscal year is approximately $6.5 million. JCLS still depends on outside revenue for their library services, including but not limited to: grant money for specific programs such as story times, federal money for library technology, the Ready to Read grant from the Oregon State library, and donations from Friends (Jackson County Oregon - Library, 2015). With so many fluctuating revenue sources, it makes running the library and outreach programs difficult. It cannot be guaranteed that popular or much needed programs will continue to be available in the future. That is a weakness of JCLS that makes their future unsteady and less secure.

Another weakness in the budget is the inconsistency of funding from branch to branch. Some branches, such as the main branch in Medford, which receives the most circulation of library materials, gets more revenues from the local surrounding community. Other branches, such as Butte Falls who only serve a population of less than 500, do not get enough money from their community (Jackson County Library District Board Minutes, October 2014). This leads to discrepancies in the services that each library provides even though they are all part of the same library system. For example, the bigger libraries get access to better technology and security. At many of the libraries, the computers and software are outdated and color printers, scanners, and faxes are not available to the public. Also, only a few branches have security guards and a security system for library materials.

Another weakness is staffing fluctuations throughout different branches in the library system. In January 2015, JCLS added an additional 58 hours to the libraries each week which
allowed branches to be open for both additional days and longer hours at a time. However, even with expanded hours, staffing is still an issue. In order to stretch coverage across the library system, some staff members work at multiple branches that are located close to each other. Designated reference librarians are only available at the Medford and Ashland library. Also, staff pay did not increase substantially with the increase in hours. Rebekah DiBianco explains that the increase in hours at her branch in Eagle Point allowed her to move from part time hours to full time hours, however her pay increased by only eighty cents a hour. That dissatisfaction with pay can result in discontentment with the library system in general by the staff, which has the potential to lead to weakened customer service. Only two staff members in JCLS are trained to use Library to Go technology, which puts all other staff and patrons at a disadvantage. If library staff does not feel like they are being properly noticed, trained, appreciated, and paid for their work time, then the quality of their work will suffer. That can eventually affect JCLS as a whole, as deadlines and meetings might get disregarded or viewed as unimportant in light of lower staff morale.

JCLS also fails to keep up with modern appeal. There are no points of interests inside the libraries, like coffee shops or gift shops. Also, the catalog lacks video games and there is very little in the way of Blu-Ray offerings. Popular items and newly released DVDs, CDs, and books need to be added to the system to make them more widely available to patrons. Often, patrons must wait 4-7 months for really popular items (DiBianco, personal communication, March, 1, 2015). Overall, the library is not seen as up-to-the times or trendy. A total revamping of look and collection would greatly benefit JCLS.

**Opportunities**
One critical opportunity already underway for JCLS is securing stable, long-term funding for library services. In May 2014, voters approved the creation of a special district to provide library services to all communities of Jackson County. A special district is a type of local government that provides specific services within a defined area (Mizany & Manatt, 2005, p. 59-60; OSL, n.d.). While a special district is separate from general state and county governing bodies, they still hold many similar powers, such as the ability to contract services, employ workers, acquire property, charge fees, and most importantly - impose taxes within limitations set by the voters and state laws (Mizany & Manatt, 2005, p. 59-60; Oregon Government, n.d.; Pfeil, 2014).

In the past, libraries in Jackson County were funded through a dedicated serial levy that voters re-approved every few years (“What’s in a Name?”, 2014). New tax laws established in the 1990’s made the levies permanent, but the funds were no longer guaranteed for library services (League of Oregon Cities, 2011, p. 1; Oregon Department of Revenue, n.d., p. 2-3; “What’s in a Name?”, 2014). Instead, the funds were delivered to the county general fund, forcing libraries to compete with all other county service departments (e.g. law enforcement, transportation) each year. In 2007, after the county lost federal subsidies that supplemented the general fund, library services (among other things) were cut in order to balance the budget (May, 2007). Now, with the creation of the Jackson County Library District (JCLD) funding for libraries is secured through a permanent tax base, with the revenue dedicated specifically for library operations.

With this new stable funding source are further opportunities to improve the status of the libraries by increasing hours of operation, improving existing services, and hiring more certified library professionals. Beyond those measures are two other distinct opportunities to create
pervading and lasting changes to the libraries by establishing a formal marketing and advocacy plan as well as a formal technology plan. Both of these plans could and should be integrated with the budget and the overall strategic plan to further ensure a stable and thriving future for JCLS.

As noted in the strengths, JCLS already offers a full suite of services and programming for a diverse patron-base with varied needs. However, a critical weakness is also the quality and quantity of technology-based services such as Wi-Fi access, computers, and printers. Increased hours and personnel combined with thorough plans for marketing and technology could improve the value of JCLS, and subsequently make it a much harder choice for budget cuts in the future.

**Threats**

Even with the development of a special district for libraries, some threats remain. For one thing, JCLS must still compete to maintain or increase levels of funding; instead of only competing among government service departments, they are now competing for voters and their tax dollars. Essentially, funding approval has shifted from the government directly to the people, resulting in the responsibility to actively maintain or increase voter support from year to year. This reality reveals two fundamental, interconnected threats to the stability of libraries in Jackson County, which are the reliability of property taxes as a funding source and JCLDs relationship with the voters.

While the development of the JCLD ensures the libraries will remain open in the future, it does not necessarily ensure the quality or level of library services provided; funds from property taxes can only go so far. Only half of all property in Jackson County is taxable, and there is no state sales tax to supplement revenues (Darling, 2007; May, 2007; “Owls”, n.d., p. 430-431). The amount of property taxes collected each year also has the potential to fluctuate, for reasons
such as natural disasters, unemployment rates, or even the creation of additional special taxing districts ("Appendix D", 2012, p. 2-4; League of Oregon Cities, 2011, p. 2-3). This places a huge burden on property owners to provide a majority of the funding for general government and special community services.

To help ease the burden on taxpayers, state law limits, or caps the amount property is taxed. If the combined amount from all taxing authorities exceeds the maximum allowed, the difference is not collected and subsequently, revenues are reduced for special districts, like the JCLD (League of Oregon Cities, 2011, p. 5; Oregon Department of Revenue, n.d., p. 7). Voters may also choose not to approve future tax increases for libraries for a variety of reasons, such as choosing to support the formation of new special districts, tax increases for different services, or even mistrust of the JCLD.

The JCLD must maintain a positive relationship with the communities of Jackson County. If the JCLD proposes any tax increases to improve or expand services in the future, voter support will be crucial. Unfortunately, trust and approval of the JCLD is already on shaky ground due to misrepresentations given to voters while initially campaigning for the library district.

When lobbying for the establishment of a special library district, library supporters campaigned on the promise of “Libraries for All” Jackson County communities (“Libraries for All”, 2014). The ballot measure won by a narrow margin, showing that voters were essentially split on whether or not their tax dollars should be used to keep the libraries open. While there were many reasons some voters were against the library district, one particular concern was the maximum tax rate the district could authorize, which was 60 cents for every $1,000 of assessed property value. Some voters were persuaded on the assurance that the library district would not
impose the maximum tax rate in the first year and instead aim for the 40-50 cent range (Mann, 2014, para. 27-29, 32; “Libraries for All”, 2014, para. 12). However, within the first few months of operations the JCLD went back on some promises they had made to the voters.

In particular, the JCLD did authorize the maximum tax rate of 60 cents after realizing they would be starting out in debt to the county for seventeen months of operating expenses (Randolph, July 2014, p. 2-4). The JCLD received a lot of backlash from the community over this decision with some voters calling them greedy and irresponsible, and accusing them of moving too fast (Mann, 2014, para. 23-26; “Our Opinion”, 2014). Later, the JCLD backed down from its decision and approved a slightly lower rate of 52 cents (Randolph, August 2014, p. 3).

An additional relations issue worth mentioning is concerns that the JCLD is showing favoritism to certain libraries and communities at the expense of many others. For example, the JCLD has been accused of expanding hours disproportionately throughout the library system by giving some libraries more hours than others, or by not increasing hours at all in some communities (“Our Opinion”, 2014; Randolph, August 2014, p. 2). These situations are already having a profound impact on the voters’ perceptions of the JCLD, causing some to question their ability to govern the libraries in a manner consistent with the value of “Libraries for All” and respect for all tax payer contributions. The JCLD cannot allow themselves to become complacent now that they have stable funding; they must continue to work closely with, value and respect all communities of Jackson County in order to thrive.

Conclusion

Jackson County Library Services will continue to support lifelong learning, education, and leadership for its community, while supporting their distinct information needs. They currently have a few opportunities to address their funding and technology issues through fair
and careful governing by the Jackson County Library District. They must also address their image and reputation with community members. Later, in the second part of this project, the new purpose statements, environmental scan, and SWOT analysis will support the creation of strategic goals that will help JCLS address these issues. To support successful goal development we will provide references to best used practices in an annotated bibliography. Ultimately, we hope our project will benefit JCLS in its quest to serve all of its communities fairly, and with the upmost dignity, respect, and leadership they can provide.
References


https://www.osfashland.org/


