Strategic Planning for Library Multitype Cooperatives: Samples & Examples

ASCLA Changing Horizons Series # 1

edited by

Steven A. Baughman
Elizabeth A. Curry

Association of Specialized and Cooperative Library Agencies
American Library Association
Chicago
1997
CHAPTER 3

VALUES

&

PHILOSOPHY
VALUES & PHILOSOPHY

The ways in which an organization is able to articulate the essential foundations of its organizational culture are critical to successful communication within the planning process and beyond. Every organization has a culture and bedrock of fundamental beliefs. These may reflect the values of the founding organizations or may represent the sometimes competing values held by a number of influential stakeholders who guide the organization. Over time, the dynamics of the organization and its position in the environment change. For library cooperatives, these kinds of changes are increasingly common and should drive a frequent re-evaluation of the organizational culture, values and principles. In addition, some observers of organizations believe all organizations go through specific developmental stages that require changes and adaptations in the organizational culture if the organization is to remain effective.

Clearly, if a library cooperative is to be effective in the long range, the cultural values of the organization, its staff, management and its members must all be in general agreement. The process of planning itself may uncover differences in values. For example, cooperatives may stress service quality over breadth or over expediency in the delivery of library services.

In the review of submitted planning documents, it was interesting to note that many organizations opted not to include this section -- either as part of the process, or as a component of the final document. While Mission Statements were ubiquitous, articulations of values or guiding principles were not. The examples included in this section offer an interesting range of approaches to the articulation of values. From fairly dense text explanations to bulleted headings with detail, the organizations settled on anywhere from four to eleven statements. Included here are elements called principles, philosophy and values. An interesting definitional problem emerged in a number of the documents examined: a blurring of distinction between the values and the functions of the organization. What the organization does became what it valued.

Common areas noted in the value statements included placing value on information in terms of its fundamental value to society, unlimited access and freedom of expression, as well as, open transmission of information. Another commonly held value was equity within the cooperative, which is not dependent upon an equal sharing of the financial burden. Large libraries see a responsibility to the smaller ones and the results of the cooperative’s services are not always quantifiable or equitable. Often, a high value was placed upon the cooperative’s leadership function, including its proactive search for partnerships. Knowledgeable staff and quality service go hand-in-hand and were often cited as primary values to be nurtured. Also the membership concept, including the basic foundation of member loyalty and support, was often cited.
Values

The Worcester Area Cooperating Libraries believes that:

• Users of WACL libraries deserve quality services and collections.
• Diversity in member institutions' size and character contributes to the strength of the organization.
• The collections of the consortium libraries enable each member library to support self-development, education, and scholarly research for its users.
• The consortium has an essential role to play in providing to its constituency effective access to and utilization of information.
• Cooperative efforts are intrinsic to the successful delivery of information to Consortium libraries' users.
• The sense of equity within the consortium does not depend on an exact balance of trade.
• Cooperative research and development in application of information technology enhances service and realizes cost efficiencies.
• Staff development and interaction enhance the quality of service provided to the users.
• Collaboration and sharing strengthen our ability to obtain and provide resources.
• The success of the Worcester Area Cooperating Libraries is advanced by the understanding and commitment of the member institutions' administrators.
• Consortium membership enhances the value of each library to its own users.

#58 -- Worcester Area Cooperating Libraries

VALUES

A. Quality
   The South Carolina State Library endeavors to provide services of the highest quality.
B. Knowledge
   The South Carolina State Library believes that a well-trained and knowledgeable staff is its greatest asset.
C. Freedom Of Information
   The South Carolina State Library believes freedom of expression is a fundamental right of a democratic society and supports the Library Bill of Rights and the Freedom to Read Statement.
D. Access To Information
   The South Carolina State Library believes that all citizens regardless of their location or means should have access to library and information services.
E. Equitable Treatment
   The South Carolina State Library provides services to its customers in a fair and unbiased manner.

#47 -- South Carolina State Library
SEFLIN VALUES

Leadership
We believe that SEFLIN's leadership is a shared responsibility of all members. We are a member-driven organization that relies on the participation and initiative of every single member of our organization to accomplish shared goals.

Communication
We maintain constant communication with the Southeast Florida library community and respond to member needs in a timely manner.

Innovation
We are committed to providing the best possible service to library customers through the development of innovative methods that result in new and effective library service.

Resource Sharing
We believe that resource sharing is an important and vital component of SEFLIN's program. We are committed to maintaining the strength of local library resources while developing new ways to expand the availability of those resources to residents of Southeast Florida.

Staff
We are committed to providing our members with quality staff who have a broad range of experience to support SEFLIN programs and member needs. Our staff work as a team, respect each other's work and fully participate in the decision making process.

Membership
We recognize that SEFLIN's strength is dependent on the diverse nature of its members. We provide a strong committee structure that encourages our members to participate in network planning and program implementation.

Organization
Our members and staff support and are committed to SEFLIN's mission and program initiatives. We work hard to maintain a sense of humor and perspective about our organization and seek consensus in making decisions. We maintain a quality organization through policies, programs and staff that will benefit the entire Southeast Florida community.

#50 b. -- Southeast Florida Library Information Network, Inc. (Summary)
HIGH PLAINS REGIONAL LIBRARY SERVICE SYSTEM
PHILOSOPHY OF SERVICE

1. High Plains members are both independent and interdependent.

2. Few if any High Plains programs benefit every member, but each member does benefit in different ways from membership.

3. High Plains helps members make intelligent and appropriate use of existing and emerging technology through whatever action is suitable to the situation, while taking into account the member’s need, level of expertise, learning style, and best way to convey the information.

4. Internet Service Providers abound in the High Plains area, and reasonable prices can be negotiated for access. High Plains will help members find, use, install, implement, and integrate Internet service in their libraries and media centers, but there is no need at this time for High Plains to provide that access.

5. The use of technology as a tool is necessary for High Plains and every member library. It is a way to convey information, a way to access information. While it may be frustrating, wonderful, demanding, and efficient, it is of no greater importance than many other facets of service. The immediate need for knowledge and keeping abreast of trends, issues, and development may be greater, but technology shouldn’t eclipse the need for maintaining strong foundation services and practices.

6. Every community and school, every child and adult has a right to library services and information. While local resources may be limited (by funding, geographic location, size, role selection, and/or design), the scope of what’s available through co-operation should be limitless. Each library will be encouraged to provide the best service possible, and will be respected for what they can do... not denigrated for what they can’t do.

7. High Plains provides some services for members which cannot be measured, and quantifiable results cannot be determined. Calming a distraught member after an ugly confrontation with a city manager, counseling someone in strategy for dealing with a problem employee, validating an independently devised process or policy are all examples of extremely important, if unheralded responsibilities. High Plains staff will always cooperate in the collection of data and statistics, but it is understood that a significant portion of our work is not reflected in reports.

8. The strength of the System lies in its ability to react quickly and unbureaucratically to local and regional needs and opportunities. High Plains staff and board have unfailing commitment to assisting members in whatever manner is appropriate, and all service decisions are based on that dedication.

9. The High Plains Long Range Plan and Annual Program/Budget are guidelines for the board, staff, and members. This agency welcomes, in fact seeks out, appropriate opportunities to expand and direct services to members, including cooperative ventures. Lack of inclusion in this document does not in any way signify non-support for a program, activity, or campaign.

#20 -- High Plains Regional Library Service System
CORE VALUES/GUIDING PRINCIPLES

DEFINITION: "Core Values/Guiding Principles are fundamental ethical, moral and professional business beliefs that guide organizational decisions. They describe the organization's desired culture, management style and methods of operation. They are clear and meaningful to ALL employees and should be visible and demonstrated." They should be reflected in the manner in which all agency employees conduct daily business, both internal and external.

LEADERSHIP: We are committed to providing strong, visionary leadership that encourages risk-taking; advocates for programs, staff and those we serve; and fosters open supportive communication.

INNOVATION: We are committed to proactive, creative and strategic approaches in the continuous evaluation and improvement of our services.

QUALITY SERVICE: We are committed to providing customers with equitable access to timely and reliable services.

PROFESSIONALISM: We are an expert and principled work force which treats customers and colleagues with respect, honesty and integrity in a spirit of cooperation.

#23 -- Kentucky Department for Libraries & Archives

Guiding Principles

Provide cost-effective technology-based services responsive to the needs of libraries and other consumers of information, and exercise regular review and update of service lines to ensure that locally developed or brokered products continue to meet the needs of members.

Promote, develop, and support programs devoted to preservation and cooperative use of member resources.

Provide cost-effective, innovative training and support programs to strengthen libraries' implementation of information technologies.

Maintain member loyalty and support by meeting member needs in a cooperative, open, and participative manner.

Maintain a balanced operating budget with adequate working capital, human resources, and facilities.

#1 -- AMIGOS
VALUES (developed May 1993):

The Boston Library Consortium believes that:

- The collections of the Consortium libraries enable each member library to support scholarly research for its users.

- Consortium membership enhances the value of each library to its own users.

- Cooperative efforts are intrinsic to the successful delivery of information to Consortium libraries’ users.

- Diversity in member institutions’ size and character contributes to the strength of this democratic organization.

- Cooperative research and development in application of information technology enhances service and realizes cost efficiencies.

- Staff development and interaction enhance the quality of service.

- The tangible assets jointly owned by the Boston Library Consortium should be devoted primarily to the benefit of its constituency.

- The success of the Boston Library Consortium is advanced by the understanding and commitment of the member institutions’ administrators.

- The Boston Library Consortium believes that the Consortium has an essential role to play in providing to its constituency, including all citizens of the Commonwealth, effective access to and utilization of information.

ADDITIONAL VALUE (developed May 1996):

- The sense of equity within the Consortium does not depend on an exact balance of trade.

#5 -- Boston Library Consortium
Guiding Principles for Network Planning

The Interim Group developed a set of over-arching principles to guide the network planning process. These principles are:

1. The library user is the primary focus of everything the Network does.
   - Quality of services improves when their design focuses on the needs of those directly receiving services.
   - The needs of the end user are growing beyond the resources of the local library.

2. All network providers will take a cooperative, coordinated approach to networking.
   - The Network organization has the ability and desire to cooperate.
   - The Network will greatly increase fiscal responsibility through cooperation/coordination.
   - The Network will increase the quality and availability of services through cooperation/coordination.

3. The Network will maximize the use of state funds through cooperation and coordination, and it will evaluate ways to maximize the use of other funds.
   - There is an increasing demand from all sectors for fiscal accountability.
   - State funding will remain flat over the foreseeable future.
   - Libraries and the network agencies will compete with commercial and other not-for-profit agencies for delivery of services to the end user.

4. Priority for using state funds will be given to meeting statewide service goals.
   - By profiling its total membership, the Network can design services that are tailored to the specific needs of end users.
   - The Network will offer its services in the context of competitive services and marketplace trends.
   - The Network will survey emerging state and national trends relating to library and information technologies, and track economic, educational, social and demographic trends to assure its priorities are consonant with user needs.

5. The Network structure for service delivery will be responsible to changing needs.
   - Technology is causing service demands to change more rapidly than before.
   - End users and libraries are becoming more demanding and sophisticated with respect to their information needs.
   - The demand for improved service is coming in areas never before considered by libraries, such as users' demand for remote, dial access to on-line systems.
   - Services will be delivered in a manner to cost-effectively reach target audiences.
Guiding Principles for Network Services

1. Network services are delivered to end users through libraries and their parent institutions.

2. Network services are designed to improve connectivity between end users and library and information resources.

3. Network services emphasize stewardship of shared collections in order to provide a virtual, seamless collection to end users within the state.

4. Network services are strengthened through partnerships with libraries and civic, business, government, and other organizations.

5. Network services include an appropriate mix of centralized and decentralized programs that meet the needs of Indiana residents.

#21 -- Indiana State Library

OUR PHILOSOPHY

A flourishing society requires information, cultural memory, and interpretation. The California State Library is uniquely positioned to serve each of these needs and strives to be ever-available as a resource to Californians as they seek to understand the past, cope with the present, and forge the future.

In order to meet the information needs of government, other libraries, and the people, our services to Californians must be proactive as well as reactive. Not only must we meet the immediately expressed needs of our customers, we must also anticipate where state government is going, ask the appropriate questions, formulate the correct policies, collect the correct materials, so that we might offer instant and applicable information service to state government and the public as required.

This implies that the individual staff members of the California State Library will themselves be intellectually engaged with the world around them; that they will have a sense of society, especially a sense of California; that they will reflect upon experience; that they will be readers and analyzers; that they find enjoyment in their jobs and see the intrinsic value of their work, especially how their particular job fits into the pattern of the whole; and that they will bring the fruits of their own intellectual engagement to bear on their professional responsibilities.

The manner in which we work towards our vision is as important as the vision itself. Our central values are key to achieving our vision for the future, and as such, we strive to integrate them into our daily service to state government, the state’s libraries, the public, and to each other.
OUR VALUES

**Information:** We believe that library and information service is essential to a learning society because information and knowledge are indispensable to the development of human potential, the advancement of civilization, and the continuance of enlightened self-government.

**Services:** We believe our services are a reflection of our people. We will strive for continual improvement in all our activities and to deliver services that are of the highest quality which consistently satisfy our customers’ needs.

**Partnerships:** We believe partnerships that are built on honesty and respect are critical for our success and strive actively to collaborate with all our partners in order to achieve mutual benefit for both ourselves and our partners.

**People:** We believe that the State Library is only as good as the people we employ and strive to treat our staff members with dignity and respect, encouraging participation, involvement and teamwork at all times and at all levels.

OUR PRIORITIES

**Customers:** We exist to serve our customers and meeting their needs is first and foremost.

**Quality:** We value the importance of providing rapid and comprehensive access to knowledge and information and strive to constantly improve the services we provide to state government, the public and to each other.

**Technology:** We believe libraries must be active partners in the development and implementation of technology to ensure that access to knowledge and information will be equitably available to all.

**Continuous Improvement:** We believe that continuous improvement should embrace every aspect of our work and encourage our employees to look for and find ways to contribute to our development. Our employees’ creativity, productivity and individual responsibility is encouraged and employees will be recognized and rewarded for their contributions.

#6 -- California State Library