Strategic Planning for Library Multitype Cooperatives: Samples & Examples

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CHAPTER 7

GOALS, OBJECTIVES
&
STRATEGIES
This chapter is not an effort to rigorously define each component, but rather to provide samples of the content and format used by organizations which submitted their plans. Generally, the goals are broad timeless statements which support the mission and vision with descriptions of what conditions will be pursued. Goals are qualitative statements of the organization's aims. Objectives, strategies, actions and desired results are interpreted in many different ways. Objectives are usually short term measurable statements of achievable results. Actions and strategies are the methods used to achieve the objectives. Strategies are sometimes descriptions of tasks or activities. At other times, strategies are descriptions of the conditions or approaches to using the organization's resources. In some plans, extensive time lines and target dates are documented. Many organizations are focusing on a more strategic approach with only general time frames listed. There seems to be a wide variety of interpretations by library cooperatives for this part of the strategic plan. The style, format, depth and detail in the various plans demonstrate these interpretations.

The organization's goals, objectives and strategies are the "road map" to follow. The benefits of such a plan or map include:

- a clear sense of direction for the organization and active stakeholders,
- documented and agreed upon destination(s) or anticipated accomplishments,
- clearly defined roles and responsibilities,
- a guide for accountability with activity levels tied to allocation of resources.

Everyone can work together more effectively with clearly articulated goals, objectives and strategies. This is one reason that a strategic plan is particularly important for interdependent organizations working in a cooperative environment.

A few of the plans submitted for this publication have a separate page with the goals listed. Most plans only have the goals listed with objectives, strategies or actions detailed under the heading. Most of the examples are reproduced in the integrated format of the plans submitted. Selected examples from different plans are included. The goals, objectives and strategies are not reproduced in total for every plan.

The goals fall into two categories: (1) goals for the organization's infrastructure and operations, (2) goals for services and achievements. This reflects the cooperative and participatory nature of systems. It is interesting to note how responsibility is denoted in different plans. Several charts show the interdependence and specific roles of state agencies, state committees or councils, local and regional cooperatives, as well as, local libraries and members of cooperatives.

Leadership and advocacy are common goals. Cooperatives, systems and networks aim to position libraries as leaders in the forefront of electronic access to information. Multitype library organizations want to influence change and influence libraries to embrace change.
Advocacy goals and activities are related to establishing the role and image of library leadership, community partnerships, information policy and legislative issues.

The emphasis on partnership goals is often with groups outside the library. A multitype cooperative, system or network can act as the partnership agent for groups of member libraries and/or as a catalyst for partnerships with individual libraries. The trend toward community networking/Free-Nets with libraries and multitype library organizations may contribute to the increased emphasis on partnerships. With the many levels of library networking and resource sharing (national, state, regional and local), the partnership and communications goals can be critical to establishing roles for each organization.

Technology goals include the general focus on emerging technology, training and consulting. Internet and the Web have made a dramatic impact on technology goals as libraries seek seamless access and delivery. The Internet has become the key infrastructure for the cooperative organizations and the member libraries. Multitypes are providing Internet for libraries, creating Web pages for libraries and empowering libraries to implement the new technology. Telecommunications policy and technology is a major planning issue. Resource sharing, access to information and delivery are still key goals for multitype library organizations. The efficiency and effectiveness of cooperation is addressed in goals for new services, as well as, core or traditional services. Cooperative purchasing and cooperative access to electronic databases is frequently planned. Internet offers new possibilities for access and delivery. The technology can empower users with more direct access to resources, at the same time libraries are facing challenges of emerging standards, hardware, software and applications.

Continuing education is a very common goal which relates to many of the other goals. The strategies include informal sessions such as user groups, interest group discussions and technology showcases. More formal training and continuing education cover a wide range of topics but often support the new electronic resources. With more electronic resources and more sessions, the need for accessible training centers has emerged. Marketing and communications goals are basic to a collaborative and cooperative organization. The marketing can be outer directed and related to advocacy strategies. The communications and public relations goals can also be directed to the member libraries.

The format of this section of the strategic plan is perhaps as important as the content. Library cooperatives need to be able to easily and continually evaluate their progress against their goals, objectives and strategies. Chapter 8 and Chapter 9 of this book address the evaluation process and format of strategic plans.
1994-1997

CAMLs Strategic Plan

Goal 1.
Maximize access to resources in and beyond members’ collections

Desired Results:
75% of members have Internet Access.
100% of members have holdings on the Union List.
A CAMLS workstation is defined and deployed.

Goal 2.
Develop the financial resources of CAMLS to meet program needs

Desired Results:
CAMLs membership totals 85.
CAMLs financial reserves are increased by $10,000.
CAMLs CE program is positioned to be self-supporting.

Goal 3.
Establish the foundation for an income-generating, cutting-edge Continuing Education program

Desired Results:
Continuing Education is provided in a multi-year sequence of programs organized around member-driven themes.

Goal 4.
Provide expert matchmaking to enhance members’ efficiency and effectiveness

Desired Results:
CAMLs facilitates multi-library partnerships and serves as an information clearinghouse in selected areas.

#12 -- Cleveland Area Metropolitan Library System
Southeast Library System
Strategic Plan

1995-1997

Goals
1. Continue to offer support for resource sharing activities while pursuing interdependence, seamless access, seamless delivery, and equity of access.

2. Improve individual libraries’ ability to offer reference and information services to patrons, including the use of print, electronic and online sources.

3. Work with libraries in the System to enhance their ability to implement technology and electronic resources in their operations.

4. Offer quality continuing education opportunities for diverse needs and audiences, especially within primary and secondary System service roles.

5. Offer consultation services within the primary and secondary System service roles; facilitate consultation among peers.

6. Work with library development leaders for reciprocal support, feedback, and cooperation.

7. Use resources as available for special projects, such as the cooperative video license.

Goal 1

Continue to offer support for resource sharing activities while pursuing interdependence, seamless access, seamless delivery, and equity of access.

- Shift 70% of sites currently dependent on ILL resource center service toward more independent ILL. (June 1997)
- Maintain existing resource center contracts during development and transition toward new goals.
- Work towards a broader means of electronic access to Nebraska libraries’ holdings, either through a union catalog or through other innovative methods. (August 1995)
- Examine and choose the most efficient and cost effective delivery system for interlibrary loan in southeast Nebraska. (August 1995)
- Develop educational requirements for the use of the system resource centers. (July 1995)
- Incorporate policies of responsibility in conjunction with use of the ILL/Reference services; include Rule Statements and guidelines divided by the system and enforced by the Center. (July 1995)
- Create an ILL training video for System members’ use. (July 1996)
- Continue to analyze and implement charges for use of System resource centers.
- Announce the fade of the 800# for resource centers; discontinue 800#. (August 96/December 96)
Goal 2

Improve individual libraries' ability to offer reference and information services to patrons, including the use of print, electronic and online sources.

- Work with the Nebraska Library Commission to offer subsidized access to databases such as OCLC's FirstSearch. (December 1995)
- Offer Internet training and access assistance. (ongoing)
- Offer reference interview training in conjunction with STAR Manual workshops. (Fall 1995/Spring 1996/Fall 1997)

Goal 3

Work with libraries in the System to enhance their ability to implement technology and electronic resources in their operations.

- Offer technology showcase workshop which highlights emerging technologies. (Fall 1995)
- Assist libraries in obtaining financial assistance for hardware purchases. (ongoing)
- Work with the Nebraska Library Commission and Nebrask@ Interactive to provide uniform and affordable Internet access. (January 1996)
- Assist libraries in developing Internet connections, including SLIP/PPP connections. (ongoing)
- Continue to provide a site license for Alliance Plus (the Follett bibliographic CD for data conversion). (ongoing)
- Employ a part time technology consultant to make onsite visits to libraries who have questions and concerns in technology development and implementation. (July 1995)

Goal 4

Offer quality continuing education opportunities for diverse needs and audiences, especially within primary and secondary System service roles.

- In addition to continuing education opportunities highlighted in previous goal statements, offer training in multi-cultural programming, children's and young adult programming, community analysis, people skills, trustee training, and basic library skills. (ongoing)
- Facilitate interest group discussions and meetings, such as the Follett user group meetings. (ongoing)
- Continue to poll membership for continuing education needs. (ongoing)
- Work with other regional library systems to deliver continuing education programs. (ongoing)
Goal 5
Offer consultation services within the primary and secondary System service roles; facilitate consultation among peers.

- Provide WATS line to the System office for member use.
- Publish a newsletter 10 times per year, to include information on library development.
- Provide incentives for mentoring among librarians, including grants to participants. (August 1996)
- Continue to provide support for Children’s Service through the provision of a Juvenile Resource Center.
- Review current Children’s Services; make appropriate recommendations. (April 1996)
- Continue to provide professional journals for routing to member libraries. Increase or change titles as needed for emerging interests. (ongoing)
- Purchase a System car for Administrator travel. (July 1995)

Goal 6
Work with library development leaders for reciprocal support, feedback, and cooperation.

- System Administrator will attend meetings with peers and with Nebraska Library Commission staff. (ongoing)
- System Administrator will participate in broad planning initiatives in Nebraska, keeping Southeast Library System goals and objectives in the forefront of discussions. (ongoing)

Goal 7
Use resources as available for special projects, such as the cooperative video license.

- Provide subsidies for the purchase of public performance rights for the airing of video productions in member libraries. (January 1996 and January 1997)
- Investigate the potential for author visits to System libraries; help facilitate visits. (ongoing)
- Create a System Handbook of services and members. (August 1995) Make this Handbook available in electronic format. (July 1996)
TIMELINE:

July 1995
Employ a part time technology consultant
Implement educational requirements for the use of the resource centers
Incorporate policies of responsibility for resource center use.
Purchase a System car for Administrator travel.

August 1995
Union Catalog of Holdings
Choose most effective delivery system for ILL
Southeast Library System Handbook

Fall 1995
Reference training
Technology showcase

December 1995
Subsidized access to online databases available

January 1996
Internet access for libraries

Spring 1996
Reference training

April 1996
Children’s Services program recommendations

July 1996
ILL/Reference training video
SELS Handbook: Electronic version

August 1996
Announce fade out of 800# for ILL/Reference
Mentoring incentives

December 1996
Discontinue ILL/Ref 800#
June 1997
70% of resource center dependent users shifted to direct ILL

Fall 1997
Reference training

Ongoing Activities:
Internet, etc. training
Variety of workshops
Consultation activities
Newsletters
Technology purchase assistance to libraries
WATS to office
Resource centers
Video license
SLIP/PPP connections for libraries
Alliance Plus provision

#51 -- Southeast Nebraska Library System
GOALS

Governance and Organization
Promote SEFLIN as a membership organization that supports and encourages resource sharing and joint use of technology among libraries in the Southeast Florida community.

Advocacy and Leadership
Establish SEFLIN as an advocate for libraries in Southeast Florida by forming alliances and partnerships with other organizations.

Emerging Technologies
Assist member libraries to identify and use strategic and emerging technologies and promote joint use of technology.

Information Resources
Support the continuing needs of members to cooperatively collect, organize, preserve and disseminate information resources for Southeast Florida residents.

SEFLIN Free-Net
Continue SEFLIN’s role in providing local, government and community information to Southeast Florida residents.

Continuing Education and Training
Provide and coordinate opportunities for continuing education to increase a library staff member’s ability to serve library users.

#50 b. Southeast Florida Library Information Network, Inc.
New Horizons for SEFLIN 2000

Goal 2:

ADVOCACY AND LEADERSHIP
Establish SEFLIN as an advocate for libraries in Southeast Florida by forming alliances and partnerships with other organizations.

Objectives

2.1 Develop marketing and public relations activities to promote SEFLIN libraries’ contribution to the economic and social well-being of Southeast Florida.

2.2 Use SEFLIN’s local successes as a way to increase local, state, regional and national recognition and attract funds and awards.

2.3 Establish an advocacy network comprised of the Free-Net Advisory Committee, library friends and trustees to promote the importance of libraries, resource sharing and the role of libraries in the information age.

Strategies

- a. Continue the publication and wide-distribution of the SEFLIN newsletter in print and electronic format. (Ongoing)

- b. Form partnerships with groups that allow SEFLIN to increase its contact with community, government and business decision-makers. (Ongoing)

- c. Write and place press releases and articles about SEFLIN activities, services, and pilot projects in the local, state, regional, and national library press. (Ongoing)

- d. Participate actively in meetings with the Florida Library Network Council, SOLINET’s Network Council, other library cooperatives, ASCLA and other related groups. (Ongoing)

- e. Develop targeted communication tools that can be used to represent SEFLIN to potential partners and member institutions. (1996 and ongoing)

- f. Establish ad hoc groups of marketing and community relations librarians to plan specific activities for promoting SEFLIN in the media and with other libraries. (1997/98)

- g. Expand communication about SEFLIN in member libraries so more staff, on all levels, are familiar with SEFLIN’s programs and services. (1997/98)

- h. Work with the member libraries and the Florida Library Association to sponsor SEFLIN activities to assist with local, regional, statewide and national efforts to increase funding and support for libraries and networks. (1997/98)
GOAL 3:

EMERGING TECHNOLOGIES
Assist member libraries to identify and use strategic and emerging technologies and promote joint use of technology.

Objectives

3.1 Assume a leadership role in identifying emerging technologies responsive to member needs and services.

3.2 Develop pilot projects to experiment with joint use of technologies.

Strategies

• a. Sponsor an emerging technologies session at SEFLIN’s annual meeting and other sessions throughout the year. (Ongoing)

• b. Establish an ongoing forum that assists members in planning cooperatively for the use of new technologies. (Ongoing)

• c. Investigate the digitization of library resources. (Ongoing)

• d. Provide information about “hot” issues under discussion by the Florida Library Network Council, the Distance Learning Network, and other state, regional, and national groups to SEFLIN members. (Ongoing)

• e. Encourage library staff to participate in existing listser vs on emerging technologies and explore the feasibility of developing a SEFLIN listserv on emerging technologies. (1996/97)

• f. Publish a bulletin with tips about using existing technology and information about emerging technologies. (1997/98)

• g. Provide funding for members and staff to attend conferences on emerging technologies and develop a method for reporting information back to SEFLIN members and electronically archiving information. (1997/98)

• h. Explore new technologies for electronic document delivery and expand service to additional SEFLIN libraries. (1997/98)

• i. Focus on electronic security issues needed to protect access to electronic information. (1997/98)

• j. Investigate options for direct delivery of materials to users via commercial document delivery options. (1998/99)

• k. Use distance learning technology for delivering continuing education and facilitating committee activities. (1998/99)
GOAL 4:

INFORMATION RESOURCES
Support the continuing needs of members to cooperatively collect, organize, preserve and disseminate information resources for Southeast Florida residents.

Objectives
4.1 Identify areas in which SEFLIN members can work together to develop and/or broker services on behalf of member libraries.

4.2 Enhance the resource sharing and document delivery capabilities of member libraries.

4.3 Expand traditional library services to more user-friendly, electronic, remotely accessible services.

Strategies
• a. Explore the cooperative purchase of electronic information resources. (1996/97)

• b. Assist member libraries in efforts to preserve materials and collections. (1996/97)

• c. Work cooperatively to assist government documents librarians to deliver electronic government information. (1997/98)

• d. Seek opportunities for member libraries to participate in cooperative collection development. (1996/97)

• e. Foster cooperative cataloging services and bibliographic maintenance. (1997/98)

• f. Use the collective purchasing power of SEFLIN’s members to secure the maximum vendor discount for information products, library equipment, technology, and telecommunications. (1997/98)

• g. Identify unique library collections appropriate for digitization in efforts to expand access to these resources. (1997/98)

• h. Evaluate the SEFLIN courier service and explore other options for providing delivery. (1997/98)

• i. Maintain, enhance and evaluate the SEFLIN library card program. (Ongoing)

• j. Explore options for expanding electronic document delivery. (1996/97)

• k. Investigate methods for streamlining the interlibrary loan process by allowing greater end-user participation. (1997/98)
GOAL 5:

SEFLIN Free-Net
Continue SEFLIN's role in providing local, government and community information to Southeast Florida residents.

Objectives
5.1 Continue and enhance the SEFLIN Free-Net as a regional resource.

5.2 Implement technological improvements to facilitate user access to the Free-Net and on-line information.

Strategies
• a. Develop a plan for a graphical user interface (GUI) and manage the migration of existing Free-Net content to a web-server. (1996/97)

• b. Maintain the operation of three county editions of the SEFLIN Free-Net. (Ongoing)

• c. Expand, enhance, and stabilize the operations of the SEFLIN Free-Net, its advisory Committee and sub-committee structure. (1997/98)

• d. Continue the recruitment, training and support for Information Providers and increase the number of Information Providers. (Ongoing)

• e. Continue training sessions for member libraries and the community and enhance the development of the volunteer corps. (Ongoing)

• f. Continue marketing the SEFLIN Free-Net with a focus on its goals and accomplishments. (Ongoing)

• g. Cooperate with other institutions and community groups on joint projects that support the overall philosophy of the Free-Net and public access to information. (Ongoing)

• h. Support the efforts of the education community to share information regionally and provide information through the Free-Net. (Ongoing)

• i. Promote the use of the Free-Net as a reference tool by member libraries. (1997/98)

• j. Develop a plan for financial stability and fund raising. (1997/98)

• k. Develop a plan to examine and clarify the role of academic libraries in the Free-Net. (1997/98)

• l. Work cooperatively with other free-Nets and community networks in the state and nation to share information and assist in the development of other Free-Nets. (Ongoing)

#50a. -- Southeast Florida Library Information Network, Inc.
Plan of Service
I. Reference and Technology

1. Strengthen reference resources available to Bergen County residents
   A. Hire a consultant to develop recommendations for enhancing reference service to the public
   B. Encourage continued cooperation between member libraries in providing reference services

2. Increase flexibility of DRA workstations with continued implementation of PC based, rather than dumb terminal, software

3. Improve the user friendliness of the OPAC interface
   A. Request focus groups to work with BCCLS staff members on PC and non-PC products

4. Work toward preferential telecommunications rates for libraries and patrons communicating with libraries
   A. Request discounts from the telecommunications industry
   B. Request support from public officials, if necessary

5. Develop the role of the Internet as a major vehicle for library service
   A. Investigate school resources for local Internet developments
   B. Address non-bibliographic files, such as community information files

6. Implement CD-ROM as part of the BCCLS profile
   A. Catalog CD-ROM circulating and reference items
   B. Enhance resources for CD-ROM use in the library

II. Communication, Cooperation and In-Service Training

1. Establish a staff development committee with a two-year charge to determine the viability of said committee to:
   A. Continue staff exchanges for various departments on a regular basis
   B. Arrange professional development programs focusing on topics of interest
   C. Provide guidelines for writing manuals covering basic library operations
   D. Encourage visits to libraries beyond Bergen County for examples of effective service and programs
   E. Sponsor one or two Publisher’s Days each year: CD-ROM, children, reference, vocational guidance, etc.

2. Continue system-wide small group meetings at least twice a year

3. Continue training sessions on technology and required skills at the BCCLS office and on site, as appropriate

4. Improve availability of resources in all formats
   A. Investigate and encourage cooperative collection development
   B. Negotiate vendor discounts
III. Alternate Funding

1. Provide continued support for BCCLS services with fees from contracting libraries and school districts

2. Use grants as the major source of funding to initiate new services when possible

3. Encourage partnerships with private and public entities where appropriate

4. Approach Bergen County towns without libraries to sign direct contracts with BCCLS

IV. Public Awareness

1. Keep library news in the media

2. Continue programs for the public regarding new technologies in our libraries

3. Become involved with technology related groups, such as the New Jersey Cable TV Association, SeniorNet, and computer clubs

4. Coordinate a county-wide book related event (possibly every two years)

   #2 -- Bergen County Cooperative Library System
C. Role Identification and Detail of MOLO’s Strategic Plan 1996-1999

1. Continuing Education

*Role:* Offer continuing education opportunities for professional, staff, and trustees to improve and enhance library services and operations.

- Produce an Annual Continuing Education Calendar
- Offer recurring basic courses in library education (orientations, reference, children’s, etc.)
- Develop issues forums for trustees and library administrators
- Identify and develop program tracks for programmatic skills building (Reference 101, 201, etc.)
- Introduce a learning component into every meeting.

2. Technology Support

*Role:* Provide ongoing support and awareness for MOLO members to adopt and manage new technologies into their libraries.

- Hire a MOLO Technologist specializing in on-site teaching and consultation
- Complete a technology training center at the MOLO Office
- Develop a first point of contact helpdesk for PC’s, OPLIN, and the Internet
- Provide consultation services for automating libraries
- Provide on-site support for PC troubleshooting
- Provide on-site Internet training for member library staffs and trustees.

3. Interlibrary Lending and Resource Sharing

*Role:* Facilitate a means of guaranteeing that library users can get information and materials not found in their libraries.

- Develop an automated interlibrary loan system which can accommodate all member libraries regardless of automated circulation system
- Further develop the article photocopying service with greater access and faster turnaround time on delivery at less expense than mediate services
- Provide reference backup systems for library members unable to answer patron questions from their own resources
- Develop reciprocal borrowing arrangements among libraries.

4. Information production

*Role:* Coordinate production of information which help libraries analyze current issues and provide services to their users.
• Create a regularly updated Union List of Periodicals in print and non-print formats
• Publish an expanded monthly MOLO MEMO newsletter
• Be able to provide camera-ready desktop publishing (reproducible on copy machines) for members libraries
• Publish and distribute Summer Reading Club supplement and other resource manuals of value to member libraries
• Create, publish and distribute reference tools (union lists, inventories on special collections, etc.)
• Investigate publishing/maintenance of local information on the Internet
• Develop “Web pages” or public access points for all member libraries available through the Internet in conjunction with other statewide initiatives (e.g. OPLIN, OhioLINK, INFOhio, etc.)

#31 -- MOLO Regional Library System