

**HIGHLANDS REGIONAL LIBRARY COOPERATIVE
LONG-RANGE STRATEGIC PLAN
FISCAL YEARS 2005-2008**



Prepared with the Assistance of
The Ivy Group, Ltd.
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Preface

The Highlands Regional Library Cooperative Long-Range Strategic Plan for Fiscal Years 2005-2008 reflects the hard work and thoughtful input of more than 300 members including members of the Board and the Strategic Planning Committee; members who participated in executive interviews and focus groups; and members in public, school, academic, and special libraries who gave their time to complete the on-line member survey.

The product of this broad-based participation is a robust plan that establishes priorities for the next three years, suggests how resources should be allocated, and recommends strategies that will expand and enhance the services that members of the Highlands Regional Library Cooperative offer to customers in more than 978 libraries.

The Ivy Group would like to extend sincere thanks to Joanne Roukens and the staff of the Highlands Regional Library Cooperative and to the members of the 2003 Long-Range Planning Committee for their support of this ambitious planning initiative. Members of the Committee who generously contributed their time, thoughtful insights, and enthusiasm include:

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INTRODUCTION

In September of 2003, The Board of Directors of the Highlands Regional Library Cooperative contracted with The Ivy Group, Ltd. to plan and facilitate its long-range planning process. The goals established at the beginning of the planning process were to:

- Measure the overall level of satisfaction among members with HRLC;
- Identify trends taking place at the regional, state, and national level that may impact the future operations of HRLC and its members;
- Identify strategies to ensure that members receive maximum benefit from the services available to them through HRLC;
- Explore perceived strengths and weaknesses of HRLC;
- Explore levels of satisfaction in specific areas such as member communications, cooperative purchasing opportunities, continuing education and training, and regional delivery service;
- Identify unmet needs of members that HRLC might be well positioned to address;
- Understand the unique requirements of individual segments of HRLC's membership base;
- Identify new areas in which HRLC might facilitate cooperation among member libraries;
- Measure the relative appeal of new member services that HRLC might offer in the future;
- Establish priorities for the successful growth and development of HRLC in the future.

The Strategic Planning Process

In order to accomplish these goals, The Ivy Group and the Strategic Planning Committee adopted a six-phase planning process designed to generate maximum participation and awareness among the organization's 978 members. The process integrated the use of both qualitative and quantitative planning tools including:

I: Initial Consultation and Project Planning with HRLC staff, Board of Directors and members of the Strategic Planning Committee

- The Ivy Group participated in a planning meeting to review project objectives, work product expectations, and timing. During this session, a list of prospects for the one-on-one interviews was created; the composition of the focus groups was confirmed; and specifics of the online survey as well as other administrative details were discussed and agreed upon.

II: Executive Interviews with Key Members

- The Ivy Group conducted in-depth interviews with 10 HRLC members who represented the interests of segments of the membership base. The purpose of the interviews was to gain insights into the problems, needs, and perspectives of members with diverse issues and challenges.

III: Focus Groups with Member Segments

- The Ivy Group facilitated four focus groups to gather qualitative information from members in individual market segments. These segments included special and corporate libraries, public libraries, college and university libraries, and school library media centers. Representatives of 34 HRLC member libraries participated in the focus groups.

IV: Online Survey of HRLC Member Base

- The Ivy Group gathered quantitative information from HRLC by conducting an online survey of the entire membership base. This survey generated invaluable information and provided a solid foundation for the development of the new strategic plan. An additional advantage of the survey was that HRLC was able to gather demographic information from school library members that will help HRLC consider the unique needs of these libraries when it designs programs and services in the future. Approximately 300 members participated in the online survey.

V: Planning Retreat

- The Ivy Group consulting team led the staff and members of the Strategic Planning committee in a one-day planning retreat. The goal of the retreat

was to familiarize participants with the results of the research, set priorities, and develop appropriate HRLC responses to the strategic initiatives that are the foundation of the Region's 2005-2008 Long-Range Strategic Plan.

VI: Preparation of New Strategic Plan

- The Ivy Group's consulting team assisted the Strategic Planning Committee in evaluating the relative importance of seven possible strategic initiatives that evolved during the planning process. Using a ranking system of one to seven in which *one is assigned to an initiative of the highest importance and seven is assigned to an initiative of the lowest importance*, the members of the Strategic Planning Committee evaluated the comparative importance of the seven initiatives. An analysis of the ranking exercise suggests that Committee members clearly attach the highest level of importance to "Emerging Technology." The results for the other six initiatives are very clustered indicating that all of the other initiatives also have merit and that HRLC should not totally disregard any of them.

Emerging technology	41 points
Information literacy	69 points
Customer service	70 points
Funding and resource development	71 points
Marketing	73 points
Member relations and cooperation	77 points
Cultural diversity	81 points

- The new Strategic Plan also reflects the on-going importance of two well-established and highly valued services—Inter-Library Delivery and Electronic Database and Product Discounts.
- The Ivy Group submitted the first draft of the Plan to the HRLC staff and Co-chairs of the Strategic Planning Committee for comment and input. The Executive Board subsequently made some revisions to the Plan and it incorporates their comments and suggestions.

Highlands Regional Library Cooperative Mission

Highlands Regional Library Cooperative promotes full and equal access to resources for the residents of Bergen, Hunterdon, Morris, Passaic, Somerset, Sussex and Warren Counties by envisioning, developing, and supporting cooperative activities, programs and services for and among member libraries.

Strategic Initiative I: Member Interaction, Communication and Cooperation:

HRLC will increase the value of the Region to its members by providing additional opportunities for members to work with and to learn from each other:

Responses:

HRLC will:

Integrate networking opportunities into Region events and programs.

Promote broader participation on committees.

Establish special interest listservs that support HRLC's new strategic initiatives.

Host smaller events in diverse geographical areas and provide opportunities for special topic discussions, meetings with members of the Board, and possibly the State Library staff.

Expand and enhance "HRLC and You" - an internal marketing and public relations campaign designed to introduce HRLC staff and Board members, and to disseminate information about individual member libraries and their staff.

Promote inter-member cooperation by identifying opportunities for members to cooperate on pilot projects, cooperative grant applications, and task forces.

Update the website, allowing it to evolve and reflect the dynamic nature of the organization and its initiatives.

Promote higher levels of participation among school library members by offering continuing education programs geared to their interests in the summer, by taking select training programs into school library venues, and by offering school oriented programs on Martin Luther King Day and Columbus Day.

Support school library members by continuing to maintain an HRLC presence in EMAnj at state and local levels.

Foster broader involvement by developing buddy programs for members who do participate in HRLC programs to mentor members who do not participate or who are new to their jobs, with special emphasis on school and special libraries.

Measurements:

Increased participation on committees by a more diverse group of members.

Evaluated responses to events hosted locally for smaller groups of members who work in the same locations.

Increased networking opportunities for Board members.

Presented HRLC programs at professional association events and offered programs of special interest to school library media specialists during the summer and on legal holidays or in-service days.

Strategic Initiative II: Inter-Library Delivery Service

HRLC will evaluate the performance of the vendor that provides the inter-library delivery on an on-going basis to ensure that members receive high quality, reliable service that ultimately supports efforts to meet or exceed the expectations of library users in the Region:

Response:

HRLC will:

Institute a bi-annual customer service program to survey a representative sample of members who use the inter-library delivery to measure their level of satisfaction with the service and to identify and correct problems in a timely manner.

Measurements:

Established regular communications with members regarding the quality of the inter-library delivery service.

Reduced the number of complaints regarding problems with the inter-library delivery service.

Reviewed results of surveys regularly with the vendor regarding the company's performance.

Strategic Initiative III: Electronic Database and Product Discounts

HRLC will continue to explore additional opportunities for cooperative purchasing and to provide products at the lowest possible prices:

Responses:

HRLC will:

Make available additional electronic database and product discounts that will assist specific member segments such as school, academic, and special libraries and to continue to negotiate the best possible prices for members.

Identify databases and products that address specific areas of concern to multiple member segments such as cultural diversity, information illiteracy, and plagiarism.

Continue to educate members about HRLC group purchasing opportunities and protocols.

Serve as a clearinghouse for information about discounts offered by other library organizations and networks.

Work to increase member awareness of the Information Services Committee, which reviews recommendations for new databases and products that might be of interest to members.

Measurements:

Expanded menu of electronic databases and product discounts.

Added databases and product discounts that support school, academic, and special libraries.

Increased number of recommendations made by members to Information Services Committee.

Updated information available from HRLC about group purchasing discounts available through other organizations and networks.

Strategic Initiative IV: Advanced and Emerging Technologies

HRLC will provide members with the awareness, tools, and training they need to evaluate the potential for using and managing advanced and emerging technologies:

Responses:

HRLC will:

Establish a Technology Committee that will focus on helping members manage and evaluate emergent technologies.

Establish a technology listserv that will make it possible for tech support staff in member libraries to communicate with each other.

Host small group topic meetings in various parts of the Region for library administrators and tech support staff to discuss best practices and other subjects of common interest, to involve a greater number of members in HRLC activities, and to showcase HRLC's leadership role in technology.

Continue to promote its "House Calls" program and make it available to a greater number of members.

Increase the number of continuing education programs on more advanced topics related to technology such as advanced Internet searching.

Provide opportunities for staff and members to attend non-library technology conferences and trade shows.

Integrate into regular member communications "alerts" about the newest developments in hardware and software that are coming online.

Serve as a clearinghouse providing information about experts in technology support and management who have worked in libraries and in other business sectors.

Measurements:

Formed a Technology Committee to implement these activities.

Included more advanced topics related to technology in HRLC's continuing education programs.

Launched a technology clearinghouse.

Conducted a pilot test to determine viability/appeal of small group topic meetings.

Increased the number of members requesting "House Calls."

Facilitated member attendance at non-library trade shows and conferences.

Strategic Initiative V: Information Literacy

HRLC will provide the support and tools for members to address issues associated with information literacy/illiteracy as defined by the American Library Association: “Information literacy is a set of abilities requiring individuals to ‘recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information’.”

Responses:

HRLC will:

Initiate efforts on the part of the Continuing Education Committee to gather information about resources currently available on topics related to information literacy, plagiarism, etc.

Provide opportunities for members in academic libraries to share information literacy curricula with other members—especially with school library members.

Add workshops on topics pertaining to information literacy to the menu of training programs.

Increase its value to school and academic library members by facilitating these programs at times and locations convenient for these participants.

Serve as a clearinghouse for names of professionals who specialize in topics related to information literacy.

Negotiate a discount for the purchase of software used in schools and colleges to detect plagiarism.

Establish a task force of multi-type libraries to develop a pilot project and grant proposal related to information literacy.

Measurements:

Disseminated data about information literacy resources to members.

Added information literacy topics to the continuing education program.

Negotiated discounts for HRLC members to purchase plagiarism detection software.

Established a task force for an information literacy project.

Strategic Initiative VI: Customer Service

HRLC will provide members with the training and support they need to ensure that every library user in the Region will receive high quality library service that meets or exceeds expectations of library users:

Responses:

HRLC will:

Review and select the best currently available resources including speakers, videos, and workshops on customer service and disseminate information about them to members.

Continue to offer customer service training in its continuing education programs to help libraries identify best practices for customer service in library settings.

Support efforts to provide better library services to non-English speaking residents by educating members on the relationship between cultural diversity and customer service.

Explore the formation of peer review teams that will provide members with a resource for conducting customer service audits in their libraries.

Measurements:

Disseminated information about customer service training resources to members.

Collected feedback from libraries using identified resources for in-house training.

Increased the number of continuing education courses on customer service.

Strategic Initiative VII: Funding and Resource Development

HRLC will support the long-term fiscal health and viability of libraries in the Region by providing members with the training and tools to manage current revenues effectively and to obtain incremental funding from alternative resources:

Responses:

HRLC will:

Obtain clarification from the State Library on the appropriate role for Regions in fund raising and advocacy.

Augment its continuing education program with workshops on financial management, including basic accounting, budgeting, formulas for valuing library services, grant writing, and funding and resource development.

Establish a listserv for members to exchange information and ideas.

Serve as a clearinghouse for information about professionals who specialize in various aspects of financial management and fund raising.

Measurements:

Met with State Library staff to obtain clarification on fundraising and advocacy questions.

Created on the Regional level a measurement questionnaire for school members analogous to the State Library Aid questionnaire for public libraries.

Increased the number of members who participated in continuing education workshops pertaining to financial management, funding, and resource development.

Increased the number of members who successfully generated revenues from non-government funding sources.

Served as a clearinghouse for information about professionals who provide consulting services related to fundraising and financial management and about other resources for fundraising, grants, and resource development.

Strategic Initiative VIII: Marketing and Public Relations

HRLC will provide members with tools and training to orchestrate successful marketing and public relations campaigns:

Responses:

HRLC will:

Incorporate into its continuing education program workshops on marketing and public relations.

Establish a special interest listserv for staff in member libraries that want to exchange ideas about marketing and public relations.

Support members with limited marketing resources by exploring the possibility of contracting with a marketing agency to produce marketing partnerships.

Explore the possibility of collaborating with other library organizations to leverage the substantial potential of the greater NY media market—particularly cable television.

Assist school library members in both articulating the value of participation in HRLC to school administrators and school board members, and in developing marketing campaigns that convey the value of school libraries to teachers, administrators, students, and parents.

Measurements:

Increased number of members who participated in continuing education programs pertaining to marketing.

Summarized marketing agency responses to initial inquiries for Regional marketing collaboration.

Executed strategies for school library members.

Strategic Initiative IX: Cultural Diversity

HRLC will provide members with tools and training to provide enhanced programs and services to culturally diverse populations, including non-English speaking residents in the Region:

Responses:

HRLC will:

Include in its continuing education program workshops topics pertaining to cultural diversity.

Serve as a clearinghouse for information about resources and specialists who assist libraries in addressing cultural diversity issues.

Explore the potential of establishing a task force of members who are interested in cultural diversity issues.

Measurements:

Introduced cultural diversity training into HRLC's continuing education program.

Disseminated information about materials and programs and other professional resources that are available for diverse populations.

Determined the potential of a multi-type library task force.

Additional Issues and Concerns:

The strategic planning process also revealed significant concerns pertaining to two additional issues. The first of these centered on the fact that libraries throughout the Region are confronted by a shortage of professional librarians and well-trained support staff. While there is broad consensus that recruitment will become an ever more difficult problem, the Strategic Planning Committee reached the conclusion that recruitment cannot be solved at the Regional level, but that HRLC should continue to support recruitment initiatives that are already underway at the state and national levels and in the Central Jersey Regional Library Cooperative.

The second area of concern is related to youth services. Since HRLC has already established a special committee to work on strategies for improving youth services in the Region, the Strategic Planning Committee elected to continue to foster and support the work of the new Youth Services Committee instead of developing other strategic initiatives in that area.