

Central Massachusetts Regional Library System (CMRLS)

Strategic Plan FY2007 - FY2010

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Introduction

In 2002, the Central Massachusetts Regional Library System (CMRLS) developed a strategic plan for the period FY2003-FY2006. CMRLS had recently made the transition to a multi-type library association, i.e. the membership included not only the traditional base of public libraries, but also school, academic, and special libraries. The focus of that plan was that CMRLS would provide a comprehensive array of programs, services, and resources designed to build the capacity of all libraries in the region, and establish and sustain an integrated and collaborative regional system of library services in Central Massachusetts. That plan also included a framework for the assessment of programs to insure quality and impact, and a plan for greater member engagement in the Region's activities. The mission statement for CMRLS, revised in 2002 and reaffirmed for this strategic plan, is as follows:

"The Central Massachusetts Regional Library System (CMRLS) promotes and supports resource sharing, professional development, collaboration, and innovation among all types of libraries in Central Massachusetts. CMRLS services strengthen member libraries and staff, creating a collaborative network that is essential to a high quality and accessible continuum of library services for those who live, work, or study in the region."

As CMRLS prepared to develop this strategic plan, it was in a very different developmental phase as an organization, and was facing a similarly different operating environment. The transition to a multi-type library system has been successful, although there are still some segments of the membership not fully engaged in CMRLS programs or other activities. Resources continue to be tight, both for CMRLS and the member libraries. The Region has responded in part by developing Bibliotemps, a fee-based program of temporary staffing for libraries that has been quite successful, both in terms of filling a need among members and generating revenue for the Region. The inter-library loan/delivery function has grown significantly, both in terms of the volume of materials and the percentage of the Region's budget, and remains a challenge. The decision-making framework developed for the last strategic plan was applied rigorously to issues such as the Regional collections and databases, and has proven a valuable and effective tool for the Region. Finally, the continuing dramatic expansion of consumer electronics available to the public have provided a significant challenge to libraries on two fronts: libraries' resource constraints make it difficult for them to keep pace in terms of hardware, software, and expertise; and the many options that patrons have for meeting their information needs have permanently altered the competitive landscape for libraries.

This strategic plan was developed on the basis of a series of meetings of a planning committee consisting of CMRLS staff, Board representatives, and members, as well as an all-day retreat involving the full Board. (A roster of Planning Committee members is included as Appendix A.) The data gathering that was conducted to inform the deliberations of the committee included an in-depth member survey; interviews with selected current and prospective collaborators and funders, as well as school representatives, a technology specialist, and a state senator; and nine focus groups of staff and Trustees from member libraries. (The member survey is included as Appendix B; selected portions of the survey compilation of the results is included as Appendix C, the complete compilation of the survey results will be available through the CMRLS website; the themes of the interviews and focus groups are included as Appendix D.) The plan includes a set of themes that characterize the plan overall, plans for CMRLS's programs and services; member

engagement strategies; plans for marketing, external relations, and revenue development; and an implementation plan specifying activities with responsibility assigned to staff and/or Board members over the coming four years. The planning process, including the information gathering, was facilitated by consultants Alan Brickman and Linda W. Braun.

Overarching Themes and Directions in the Plan

The strategic plan contains many specific activities and initiatives for the coming three years. These directions embody a clear set of overarching themes that together characterize an exciting and ambitious future for CMRLS. These themes are summarized below.

- **Maintaining and improving core services:** CMRLS core services including delivery, continuing education, and databases, continue to meet essential needs of the members and will continue to be a major commitment for CMRLS. In addition, Regional Reference, a state mandated program, will continue to be a component of CMRLS's core services. Over the coming years, CMRLS will work with members and through the committees to develop and improve these services to support expanded participation and use, and to have more strategic impact with the membership.
- **Encouraging expanded use of electronic tools:** Responding to input from members, CMRLS will provide an expanded array of electronic and online resources for members, and will assist members to understand and effectively utilize emerging technological tools to provide enhanced services to patrons.
- **Promoting innovation:** Libraries must change if they are to attract new, especially younger, patrons while maintaining their traditional base of library users and if they are to remain competitive in the growing marketplace of information services. Through training and consultation, supporting pilot projects, and facilitating sharing among members, CMRLS will seek to catalyze innovation in areas such as libraries' use of technology, their approach to collections, the role of the librarian, partnerships with community-based organizations, and the use of library space.
- **Renewed efforts to expand member engagement:** CMRLS will renew and refocus its efforts to engage all members in the programs and activities of the Region. This will include a concerted outreach effort, focusing on one-on-one contact with targeted library staff, convening members around specific issues or topics, and scheduling and siting CMRLS programs to enable maximum participation.
- **Marketing and visibility for CMRLS:** In many ways, the seamlessness of CMRLS's services and the "invisibility" of the organization can be seen as strengths. However, as CMRLS tries to develop additional revenues and partners, promote innovation, and create greater public awareness of libraries in Central Massachusetts as a system, it must be more visible as an entity that a variety of key constituencies must understand and value. CMRLS will take a more proactive approach to marketing and public relations in an effort to create visibility for the Region and to attract support and engagement among key identified constituencies.

- **Expanded involvement of the Board:** Implementation of the directions in this strategic plan will require a higher level of involvement from the Executive Board as the leadership body of the organization. The Board will be increasingly active working with staff to promote innovation, recruit regional partners, market CMRLS, and increase revenues for the Region.

Programs and Services for Member Libraries

Delivery, Inter-Library Loan, and Collection Support

Delivery continues to be an essential element of the vision of a regional system of library services, and is growing dramatically in terms of both the volume of materials moving around the system and the cost to the Region (in actual dollars and as a percentage of the budget). CMRLS will continue to actively promote this service, make members aware of the materials available throughout the region, and encourage members to think about their own collection development efforts in the context of region-wide opportunities for sharing. In addition, CMRLS staff will continue to work with member library staff (through advisory committees) and through a statewide collaborative to refine and streamline the delivery process to make it as effective and efficient as possible.

Inter-Library Loan (ILL) continues to be a valued service, though demand is anticipated to remain stable.

As part of the implementation of the 2002 strategic plan, CMRLS reduced and narrowly focused its book collections. Maintaining and updating the collections is no longer an effective use of resources. Over the course of this plan CMRLS will ultimately divest itself of its hard-copy supplementary collections. It is anticipated that the expanded emphasis on technology and both electronic and online resources will ease the transition for some libraries that rely on the regional collections. In Year 1 of this plan, CMRLS will work with the libraries that make most use of this resource to prepare them for the transition and will begin the process of divesting the collections, which will be completed early in Year 2.

Continuing Education

Continuing education and professional development continue to be among the most valued and well received of CMRLS core services. CMRLS effectively identifies member needs and interests and then develops workshops accordingly. This process is valued and well regarded by the members. The focus of CMRLS's efforts over the coming years will be to build on this foundation by addressing some of the persistent barriers that prevent staff from member libraries from participating.

CMRLS will develop alternative methods and formats for delivering continuing education in order to expand and diversify participation. CMRLS will explore delivering selected continuing education content in a variety of formats, including traditional workshops as well as workshops delivered by telephone or online. Such multiple vehicles allow for wider participation in training, but would also generate data about which methodologies best support increased participation. In

addition, CMRLS will explore the impact on participation of locating the training out in the field, in member libraries or other community-based settings. Finally, CMRLS will, within the constraints of staff capacity and affordability, continue to conduct on-site training for individual libraries or perhaps clusters of libraries, in response to specific requests.

Regional Reference Services

CMRLS will continue its regional reference contract with the Worcester Public Library, and will work with the WPL staff to maximize the value of the service to the members in the region. To that end, we hope to focus on continuing to improve the training and professional development component, the customer service orientation of the WPL reference staff, the marketing of the available regional reference services to members, and the data collected about the utilization of regional reference services for the purpose of program assessment and continuous improvement. (More detailed recommendations about the future of the regional reference contract are attached as Appendix E.)

Electronic Resources

The approach of CMRLS to providing electronic and online resources to its member libraries over the coming years will be an example of a core value of CMRLS as the capacity building resource for libraries in central Massachusetts: a mix of service and leadership. That is, CMRLS will respond to the needs expressed by the membership, but will also provide leadership and encourage libraries to explore new and emerging technological trends in order to improve the quality of their services to patrons. There are two primary categories of effort in this area: support for the broader and improved use of the databases by libraries and patrons, and providing leadership regarding emerging technological trends in library services.

With regard to **support for the use of databases**, the range of possible activities for CMRLS includes the following:

- Training for library staff in database use, provided both face-to-face and online;
- Training and support for any potential state implementation of federated searching;
- Templates and prototype lesson plans that librarians can use with patrons;
- Interactive web-based decision trees to help users with the search functions;
- Print and web-based documents that connect database content to specific Massachusetts state curriculum frameworks that support public and school libraries to work effectively with students;
- Directories of database content that can be used to identify available material both alphabetically and by subject;
- Materials and tools to help librarians help their customers choose the right database for a particular purpose;
- Develop relationships with database vendors to help them understand the needs of librarians and patrons related to the successful use of databases, and work with these vendors to customize and/or market their products accordingly;

- Materials and templates that librarians can use to market the databases (in print or electronically) to specific audiences such as K-12 and postsecondary teachers and administrators, local businesses, students and parents, etc.

With regard to providing leadership around trends in library services involving technology and electronic resources, CMRLS will:

- Actively research current technology-related best practices (including hardware, software, all formats of digitized content, ways in which libraries are organized and staffed to maximize patron access to these resources)
- Disseminate information and provide training for libraries to explore and implement these emerging approaches;
- Work with WPL to provide the most current and effective reference services possible through the use of emerging electronic, online, and technological tools.

Promoting Innovation in Library Services

Libraries, and the world they operate in, are changing rapidly. Libraries have to evolve and change to stay relevant, to continue to attract new constituencies of patrons while keeping their traditional base of users, and to stay at the forefront of the information services field.

CMRLS is well positioned and sees it as a core component of its role to provide leadership and support around the kinds of innovation that will help libraries achieve these goals in the 21st Century. Below is a list of the kinds of innovations that are emerging around the country and that CMRLS could support libraries to explore and implement. (More detailed descriptions of these innovations are attached as Appendix F.)

- a) Different approaches to collections;
- b) The changing role of the librarian;
- c) The role technology plays in providing opportunities for collaboration and networking both among patrons and between library staff and patrons;
- d) New roles for community partners;
- e) Outreach activities and events that draw traditional and new patrons to the new library spaces both individually and as groups;
- f) Amenities and space utilization that create a welcoming environment;
- g) Revised code of patron conduct and behavior;
- h) The development of “community space” (actual and virtual).

There are a number of tools and approaches through which CMRLS can promote innovation in library practice among member libraries. These include:

- **Training** (in any of the formats that we have discussed: face-to-face, online, etc.) that creates awareness of the various emerging models for the use of library space, that rationale for those models in terms of the needs and issues they are addressing, and the technology, tools, and other resources necessary to implement those models. In addition, the training will give librarians the opportunity to explore how those models might be applied or adapted to their settings and communities.
- Follow-up on-site **consultation** that supports libraries' application of the information presented in the training to their libraries and communities. This follow-up technical assistance can be for individual libraries or clusters of libraries with similar interests or circumstances.
- **Dissemination** (print, electronic, online) of information and documentation on existing models, resources, and related research. Such dissemination could be intermittent (as materials are available) or as part of regular publications or online vehicles. Such materials can include templates or prototypes that libraries can adapt to their specific needs, and/or documents that librarians can use to advocate for change with their trustees, institutional leadership, and/or local officials.
- **Direct implementation** and maintenance/management (by CMRLS) of promising practices and replicable models (i.e., "modeling" the behavior or practice).
- Convene and/or facilitate (and perhaps fund) a **think tank**, consisting of interested members, to gather, review, and synthesize research about new and emerging models of organizing library space in all types of libraries with the goal of making specific recommendations to the membership.
- Funding **mini-grants** to members or clusters of members to support **pilot projects** around the use of library space. Mini-grant recipients would be required to document their activities and disseminate the results to the membership.
- **Recognition and awards** for exemplary models of innovation in the region. Create visibility for these exemplary practices both within the membership and in the community, and showcase and create visibility in as many ways as possible (including field trips and site visits).

CMRLS will "seed the field" through training and dissemination activities that create awareness and interest in selected innovative approaches to library services. Once the types of innovations that members are most interested in exploring are identified, CMRLS will work with members to tailor the most effective approach to promoting and supporting change.

Member Engagement

CMRLS will implement a variety of activities that will effectively increase member engagement. Increased participation in continuing education and other staff and program development opportunities will improve the quality and accessibility of library services to current

and prospective patrons throughout the region. In addition, increased involvement in CMRLS committees and task forces will help ensure that CMRLS's programs and services are responsive to the needs of libraries and have the maximum positive impact on the quality of library services. The more active members, the more potential there is for sharing resources and expertise, and the more the membership can effectively build a genuine regional system that maximizes patron access to library resources and information. Finally, the more engaged the membership, the more effective region-wide advocacy efforts can be in support of libraries and the Region.

Increasing member engagement has been one of CMRLS's longstanding goals. There are a number of persistent barriers to increasing the participation of some members in CMRLS's activities, related to issues such as scheduling, limited resources, and limited staff capacity of some of the smaller libraries.

In this context, CMRLS will put renewed energy into efforts to generate greater member involvement in programs, committees, and other regional activities. Those efforts will include:

- a) **Targeted outreach**, including:
 - One-on-one outreach to library directors and their staffs in under-participating libraries;
 - Personal visits to library directors and staff;
 - CMRLS staff attending staff meetings at selected libraries to make presentations about CMRLS's programs and to answer questions.

- b) **Improvements to the continuing education program that will increase access**, such as:
 - Expanding the locations of the off-site trainings;
 - Repeating sessions to allow more people to attend;
 - Implementing new "at your request" trainings for library staff in response to specific requests;
 - Implementing a number of the online and other formats for continuing education programs that can increase access (described earlier).

- c) **Develop opportunities to bring staff from various libraries together**, such as:
 - Library open houses (visits to new or newly renovated libraries, couple these tours with a topic specific discussion);
 - Topic specific affinity groups and/or study circles (on topics related to emerging trends in library services, or libraries experiencing similar issues in the developmental lifespan of their libraries such as a construction project or the implementation of an "information commons")

Marketing and External Relations

Marketing and Visibility

Over the coming years, CMRLS will invest energy and resources in marketing itself and its programs and creating a new level of visibility for the region among several key constituencies. The goals of these marketing activities, in order of priority, include:

- a) Expanded use of services by members and increased involvement of members in all the Region's activities;
- b) Increased funding, both public and private;
- c) Increased marketing and visibility *for members* through the Region's presence;
- d) Increased brand awareness (awareness of the Region, differentiate from C/W MARS, establish a dynamic and robust image);
- e) Broad public recognition of the libraries as part of the quality of life in communities;
- f) Broad public awareness of the value to libraries of the shared resources that the Region facilitates;
- g) Increased membership, especially among schools and special libraries, the two under-represented constituencies;
- h) Increased opportunities for collaboration with other Central Massachusetts organizations, including the business community.

The key audiences for this marketing effort, some of whom are related to several of the goals above, include:

- Business community, through various Chambers of Commerce (Worcester County, Blackstone Valley, Metrowest, Northern Worcester County);
- Adult Basic Education (ABE) community, including local providers, SABES (the professional development entity for adult literacy providers), and Literacy Volunteers;
- Area nonprofit organizations, through the GWCF Non-Profit Center;
- Elected and appointed officials, at the state and municipal levels (including Boards of Selectmen, Town Administrators, Finance Committees);
- School principals, superintendents, school committees, and school library media specialists;
- Special libraries;
- Public libraries;
- Staff of CMRLS member libraries;
- C/W MARS members/users;
- Library patrons;
- The public at large (i.e. taxpayers; home school families, elderly, etc.).

CMRLS will work with a marketing consultant to develop messages, language, approaches and materials for reaching these audiences to achieve the goals above. It is especially important that these marketing efforts be coordinated with CMRLS member libraries, so that the benefits of increased visibility and increased public awareness of library issues be enjoyed by the Region and by individual member libraries to the maximum degree.

CMRLS's Regional Collaborative Partners

As part of CMRLS's efforts to achieve greater visibility and to assemble resources and linkages that can benefit members will be a concerted and systematic effort to develop collaborative relationships with other regional entities in Central Massachusetts. The prospective regional partners for CMRLS include the following:

- a) **C/W MARS**: to integrate and coordinate services to libraries in the region, and to ensure that the system for resource sharing among member libraries (system-wide holds, ILL, and delivery) is managed in the most effective and efficient way possible;
- b) **The business community**, through Chambers of Commerce and other business associations, in order to increase business awareness and use of library resources, and to engage businesses as partners with their local libraries;
- c) **Teachers**, through local and regional teacher associations, to increase awareness and use of library resources, and to increase membership and engagement in the region among school libraries;
- d) **Senior citizens**, through agencies that serve and advocate for the elderly, to increase their awareness and use of library resources, and to help libraries understand the service needs of elders;
- e) **The adult literacy community**, through literacy provider organizations and related associations and intermediaries, to increase the awareness and use of library resources by both literacy practitioners and low-literacy adults;

Revenue Development

While CMRLS has had some success in generating additional revenues since the last strategic plan, it does not yet have the level of visibility necessary to develop significant revenue from individual donors, and the budgets of its member libraries are seriously constrained so that new categories of fee-for-service revenue is not realistic at this time. CMRLS's revenue development efforts over the coming few years will include the following:

- ➔ Continued efforts to seek **private (i.e. foundation and corporate) grant funding** for selected special projects in areas such as expanding core services, promoting innovation, developing regional collaboration, or CMRLS own organizational development. There may be promising opportunities to develop joint proposals with either regional partners or member libraries. Specific areas that may be promising for the cultivation of partners and the development of joint proposals include: elderly services, community health information, workforce development, adult literacy, and after-school programming.
- ➔ The continuation of **BiblioTemps**, a fee-based temp service that supports member libraries with staffing and coverage. The service has been a success both in terms of meeting a real need

among the members and generating net revenues for CMRLS. This program will continue, and CMRLS will seek to expand the services (types of staffing and geographic area) with the goal of maximizing revenues.

- **Expanded public (i.e. government) support:** CMRLS will continue to work with its member libraries, with other regional library systems and networks, the Friends of CMRLS, and other stakeholders to advocate for increased state funding for libraries and for the Region. A major part of the Region's role in such advocacy is to recruit other regional organizations and stakeholders into efforts to advocate for libraries.

- **Increase public visibility:** CMRLS will focus its marketing efforts on continuing to expand its visibility, awareness, and sense of value among various community constituencies so that the Region can eventually develop campaigns targeting individual and corporate donors at a significant level. Eventually, after achieving this new level of visibility, CMRLS can revisit the issue of these other types of fundraising.

Implementation Plan

The charts on the following pages represent the implementation plan for CMRLS over the four-year period covered by the strategic plan, i.e., July 2006 through June 2010. The implementation plan presents activities related to all the major categories covered in the plan in three periods of time: Year 1, Year 2, and Years 3 and 4. In addition, the charts indicate responsibility for specific activities among CMRLS staff, Executive Board, and Committees. After each activity there are a series of letters in parentheses that indicate assigned responsibility as follows:

S = Staff
B = Board of Directors
C = Committee(s)

It is important to note that there is a substantial amount of detailed operational planning that must be done by CMRLS staff, Executive Board, committees, and other segments of the membership for the effective implementation of the strategic plan.

Services to Members

Component of Strategic Plan	Year 1 (FY2007)	Year 2 (FY2008)	Years 3&4 (FY2009 & FY2010)
Providing and supporting the use of electronic resources	<p>Communicate with C/W MARS and MBLC to facilitate delivery of federated searching to members. (SB)</p> <p>Convene ad hoc committee to develop lesson plans for teaching database searching skills. (SC)</p> <p>Promote and disseminate lesson plans and training materials to members in print and online. (SC)</p> <p>Convene ad hoc committee to create marketing materials. (SC)</p>	<p>Create framework for working with vendors in order to educate them about the needs of librarians and their customers. (SC)</p> <p>Begin relationship building with vendors.(SBC)</p> <p>Host vendor/librarian meetings and open forums. (SBC)</p> <p>Update lesson plans and training materials. (SC)</p> <p>Disseminate marketing materials. (S)</p>	<p>Update training materials. (S)</p> <p>Update marketing materials. (SC)</p>
Continuing education	<p>Develop framework/matrix for decision making, related to topics and formats for continuing education. (SB)</p> <p>Develop multiple vehicles to provide opportunities to learn content in a variety of formats. (S)</p>	<p>Offer CE packages. (S)</p> <p>Evaluate success of offerings in various formats. (S)</p> <p>Revise vehicles based on assessment. (S)</p>	<p>Continue to offer, assess, and revise CE packages. (S)</p>
Regional reference	<p>Meet with WPL staff involved in regional reference to needs identified as a part of the strategic planning process - including expanded training, staffing/customer service, and marketing/communication. (SB)</p>	<p>Support implementation of new and improved regional reference services as needed. (SB)</p>	<p>Evaluate regional reference services and make changes as needed. (SB)</p>

Component of Strategic Plan	Year 1 (FY2007)	Year 2 (FY2008)	Years 3&4 (FY2009 & FY2010)
	<p>Reduce emphasis on traditional reference services in favor of training and other types of assistance keeping current with reference trends. (S)</p> <p>Negotiate new regional reference contract(s) based on needs identified in strategic planning. (SB)</p>		
Delivery, ILL, and collections	<p>Work collaboratively with other Regions, Networks, and MBLC to plan implementation of recommendations in the various delivery study(ies). (SB)</p> <p>Work with members who actively use the regional collection to prepare them for the elimination of the collection. (SC)</p> <p>Begin divesting the collection. (SC)</p>	<p>Implement strategies for delivery developed by studies and/or consultants. (SB)</p> <p>Complete the divesting of the regional collection, and continue to work with those libraries that have relied on the regional collections to implement resource-sharing plans that effectively meet their needs. (SC)</p>	Evaluate success of delivery service and make changes as needed. (SB)
Promoting innovation in library practice	<p>Explore funding sources for pilot projects and mini-grants. (SB)</p> <p>Develop CMRLS grant guidelines for funding of pilot projects. (SC)</p> <p>Seek out educational opportunities – online and face-to-face – in order to learn about innovative practices and technologies that have an impact for/on libraries. (S)</p>	<p>Publicize, accept applications, and support innovative grant projects. (S)</p> <p>Provide training based on information gained at workshops attended by CMRLS staff. (S)</p>	<p>Disseminate articles and reports from grant recipients. (S).</p> <p>Host workshops and meetings in which grant recipients discuss their projects. (SC)</p> <p>Begin new round of grant funding for innovative projects.(S)</p>

Member Engagement

Component of Strategic Plan	Year 1 (FY2007)	Year 2 (FY2008)	Years 3&4 (FY2009 & FY2010)
Regular communication with the membership	<p>Pilot member engagement projects for library open houses and hosting of staff meetings on a limited basis in order to determine effectiveness. (S)</p> <p>Continue to explore and implement various means of communication with members (listservs, website blog, phone tree). (BC)</p>	Evaluate success of open houses and staff meetings to determine if project should be expanded to larger groups, more often, etc. (S)	Assess and refine. (SB)
Targeted outreach	<p>Further develop plan and materials for meeting with directors in low participation libraries. (SB)</p> <p>Implement various opportunities for on-site interactions with groups of library staff. (S)</p>	Make visits to libraries identified as low participation. (SB)	Evaluate success of the visitation program to determine if it should be continued, revised, or discontinued. (SB)
Committees and convening	<p>Initiate a member survey to determine interest in and topics for special interest groups. (S)</p> <p>Develop list of special interest groups/topics and invite members to act as conveners of the groups. (SC)</p>	Hold special interest group meetings on a regular basis. (SC)	Continue to hold special interest group meetings. (SC)

Marketing and External Relations

Component of Strategic Plan	Year 1 (FY2007)	Year 2 (FY2008)	Years 3&4 (FY2009 & FY2010)
Establishing a highly visible CMRLS brand	Hire a marketing consultant and/or graphic designer to create a full complement of branded materials that provides a consistent look and feel for all CMRLS publications – website, newsletter, brochures, and so on. (SC)	<p>Advertise new look and feel of CMRLS branded materials. (S)</p> <p>Disseminate new branded materials to libraries. (S)</p> <p>Evaluate effectiveness of marketing and reassess level of expenditure. (SB)</p>	Evaluate effectiveness of marketing and reassess level of expenditure. (SB)
Marketing activities targeting specific audiences		<p>Create and disseminate packets using newly branded materials that advertise CMRLS programs and services to specific audiences. (SC)</p> <p>Make site visits to identified audiences to inform staff of CMRLS services. (SC)</p> <p>Contact various audiences to make sure CMRLS is included as a resource link on websites.</p>	<p>Revise and re-disseminate packets as necessary. (SC)</p> <p>Continue site visits. (S)</p>
Developing and cultivating regional collaborative partners for CMRLS	<p>Investigate outside organizations and agencies in which CMRLS can become a member by participating in events and/or becoming a part of committees and administrative structure. (S)</p> <p>Based on initial investigations assign CMRLS staff to organizations for which they should contact and become involved with. (S)</p>	<p>Evaluate success of CMRLS staff involvement in local organizations. (SB)</p> <p>Continue involvement in organizations in order to promote CMRLS programs and services. (S)</p>	Based on success of the relationships developed during the previous two years, discuss and create a project in which organizational partners can work with CMRLS. (SBC)

Fundraising and Revenue Development

Component of Strategic Plan	Year 1 (FY2007)	Year 2 (FY2008)	Years 3&4 (FY2009 & FY2010)
Grant funding	<p>Seek library and non-library partners with which to develop collaborative proposals. (SC)</p> <p>Submit proposals as appropriate. (SC)</p>	<p>Continue to cultivate partners and submit joint proposals. (SC)</p> <p>Continue to identify additional grant funding opportunities for CMRLS. (SC)</p>	<p>Continue to cultivate partners and submit joint proposals. (SC)</p> <p>Continue to identify additional grant funding opportunities. (SC)</p>
Fee-for-service revenue	<p>Continue BiblioTemps, and explore and implement opportunities to expand the program geographically. (SB)</p> <p>Seek organizational development grant to support BiblioTemps staffing through the period of growth. (SC)</p> <p>Continue to conduct analysis of revenues, costs, and potential for sustained staffing. (SB)</p>	<p>Consider hiring staff if financial analysis shows viability. (SB)</p>	<p>Assess and refine.(SB)</p>
Public (i.e. government) support	<p>Continue advocacy effort in collaboration with CMRLS Friends of Libraries, Mass Library Association, and others. (SBC)</p> <p>Continue to participate in the Central Mass Library Legislative Breakfast. (SBC)</p>	<p>Continue (SBC)</p>	<p>Continue. (SBC)</p>
Visibility to support future fundraising and revenue development	<p>Continue to develop regional partners and collaboration.(SC)</p> <p>Implement activities related to CMRLS identity and brand.(SBC)</p>	<p>Assess and refine. (SBC)</p>	<p>Assess and refine. (SBC)</p>

Appendix A

CMRLS Strategic Planning Committee

Maureen Ambrosino	Central MA Regional Library System
Joann Archetto	Blackstone Public Library
Margaret Cardello	Central MA Regional Library System
Christine Drew	Worcester Polytechnic Institute
Jane Dutton	Gale Free Library, Holden
Suzanne Hoey	Worcester Trial Court Law Library
Betsy Like	Cummings School of Veterinary Medicine at Tufts University
Carolyn Noah	Central MA Regional Library System
Charlotte Rabbitt	Bellingham Public Library
Michelle Rehill	Algonquin Regional High School

CMRLS Strategic Plan Member Survey

As you may know, CMRLS is in the process of developing their five-year strategic plan. In order to create a plan that will meet the needs member libraries, it is important to get feedback directly from our members. The answers you provide to our survey will be instrumental in helping CMRLS determine the direction our Region takes over the next five years.

As you answer the survey think about the services you currently receive from CMRLS (those that are helpful and beneficial, as well as those that have not been beneficial to you and your library), and services you wish CMRLS would add to what they already provide. If you have additional comments you think would be helpful to CMRLS as they work on the strategic plan, please include them.

We expect the survey to take no more than 10 minutes. Thank you for your help and your time.

- 1) Name: (Optional)
- 2) Library: (Optional)
- 3) Position in your library: (Optional)
- 4) In which type of library do you work?
 - Academic
 - Corporate
 - Hospital/Medical
 - Public
 - School
 - Other (please specify)

- 5) What is the size of the community that your library serves?
 - Less than 100
 - 100 to 1000
 - 1000 to 2500
 - 2500 to 5000
 - 5000 to 10,000
 - 10,000 to 25,000
 - Over 25,000

- 6) Which of the following CMRLS programs and services are most important to your library (select your top 3.)
 - Delivery
 - Databases
 - Regional reference service
 - Collections
 - Training/continuing education
 - Roundtables, meetings, and discussion groups convened by CMRLS
 - Consulting
 - Newsletter (Centralities)
 - Bibliotemps
 - Other, (Please specify)

Comments (Please add any information that would help CMRLS understand your above selections.)

7) How would you rate the CMRLS space and facility in each of the following areas? (Where 1 equals doesn't meet needs at all and 4 equals meets needs perfectly)

	1	2	3	4	Don't Know
Location					
Computer Lab as a training space					
Meeting Room for meetings					
Meeting room as a training space					
Parking					

Comments (Please add any information that would help CMRLS understand your above selections.)

8) Which of the following would you like CMRLS to make available to your library: (select the top 3)

- Funding ("seed money") for pilot projects
- Access to new technologies for testing out in your library
- Space for testing out new technologies that might be used in your library
- Access to reference services and collections in specialized libraries: medical, legal, business, etc.
- Training for trustees, administrators, etc. on library topics
- Training and information on literacy initiatives for children and/or adults
- Public relations materials on the importance of libraries to the community
- An interface for one-stop/easy access to online resources
- Support for staff on how to best use and publicize databases and other electronic resources
- Opportunities to collaborate with community organizations
- Training/information on how to support economic and workforce development in the community
- More electronic databases
- Fewer electronic databases
- Opportunities for networking with peers
- Access to web-based virtual space for to host or participate in training and/or meetings
- Other, please specify

Comments (Please add any information that would help CMRLS understand your above selections.)

9) If CMRLS had to cut back on its services in order to expand what it offers to member libraries, which of the following would you suggest that they eliminate or downsize? (Select the 3 that are of least value to you.)

- Delivery
- Collections
- Databases
- Professional development
- Literacy initiatives
- Newsletter
- Bibliotemps
- Regional Reference Service
- Other, please specify

Comments (Please add any information that would help CMRLS understand your above selections.)

10) Which of the following trends or topics do you think are most important for CMRLS staff to keep up with in order to provide the latest information and other services and resources to members? (Select 3 that you think are most important.)

- Digital publishing
- Copyright/intellectual property
- Privacy legislation
- Electronic delivery
- Information technology
- Literacy initiatives
- Community collaborations
- Community economic and workforce development
- Library education (what does this mean: college programs?)
- Online learning
- Virtual community building
- Hardware
- Software
- Other, please specify

Comments (Please add any information that would help CMRLS understand your above selections.)

11) Are there any examples of projects that your library would like to undertake but have not been able to because you did not have the resources (staff, money, collections, technology, expertise, etc.) necessary to do so? If so, describe them specifically.

12) What services (both new and existing) would you like to see CMRLS providing 5 years from now? Please be specific and think about what you expect your library's needs to be in five years and how CMRLS can help support those needs.

13) Please use the space below for comments and suggestions you have for CMRLS that would be helpful in their strategic planning process.

14) If you would like to be included in a CMRLS strategic planning focus group enter your email address below:

CMRLS Strategic Planning Survey Results

169 complete responses

Questions 1-3 were optional: Name, Library, Position in your library

4.) In which type of library do you work?

	Number of Responses:	Response Ratio:
Academic	35	21%
Corporate	1	1%
Hospital/Medical	2	1%
Public	82	49%
School	44	26%
Other, please specify	5	3%
Art Museum		
Research		
Special		
Law		
Public Law Library		

5.) What is the size of the community that your library serves?

	Number of Responses:	Response Ratio:
Less than 100	0	0%
1000 to 2500	37	22%
2500 to 5000	26	15%
5000 to 10,000	20	12 %
10,000 to 25,000	39	23%
Over 25,000	27	16%

6.) Which of the following CMRLS programs and services are most important to your library (SELECT YOUR TOP 3.)

	Number of Responses:	Response Ratio:
Delivery	118	70%
Databases	131	78%
Regional Reference Service	14	8%
Collections	21	12%
Training/Continuing Education	122	72%
Roundtables, meetings and discussion groups convened by CMRLS	46	27%
Consulting	27	16%
Newsletter (Centralities)	17	10%
BiblioTemps	6	4%
Other, Please specify	5	3%
MassCat		
Please note BiblioTemps is 4 th and also important		
MassCat and OCLC		
MassCat		
Membership and training in MassCat		

7.) Comments (See online version of report.)

50 Responses

8.) How would you rate the CMRLS space and facility in each of the following areas? (Where 1 equals "doesn't meet needs at all" and 4 equals "Meets needs perfectly".)

The top percentage indicates total respondent ratio; the bottom number represents actual number of respondents selecting the option.

	1	2	3	4	Don't know
Location	5% 8	8% 13	43% 73	33% 55	12% 20
Computer Lab as A training space	4% 6	4% 7	30% 50	28% 48	34% 58
Meeting Room for meetings	3% 5	8% 13	36% 60	31% 53	22% 38
Meeting Room as a training space	2% 4	12% 21	38% 65	21% 36	25% 43
Parking	12% 21	33% 56	27% 45	14% 24	14% 23

9.) Comments (See online version of report.)

51 Responses

10.) Which of the following would you like CMRLS to make available to you and your library (SELECT THE TOP 3.)

	Number of Responses	Response Ratio
Funding ("seed money") for pilot Projects	51	30%
Access to new technologies for testing out in your library	63	37%
Space for testing out new technologies that might be used in your library	8	5%
Access to reference services and collections in specialized libraries – medical, legal, business, etc.	38	22%
Training for trustees, administrators, etc. on library topics	24	14%

Training and information on literacy Initiatives for children and/or adults	27	16%
Public relations materials on the importance of libraries to the community	38	22%
An interface for one-stop/easy access to online resources	62	37%
Support for staff on how to best use and publicize databases and other electronic resources	51	30%
Opportunities to collaborate with community Organizations	20	12%
Training and information on how to support economic and workforce development in the community	8	5%
More electronic databases	71	42%
Fewer electronic databases	1	1%
Opportunities for networking with peers	53	31%
Access to web-based virtual space to host or Participate in training and/or meetings	22	13%
Other, Please specify	15	9%
On-site consulting		
Opportunities to collaborate with other libraries		
Difficult to choose only 3. There are so many needs		
Tutor.com		
Online encyclopedia		
Support for local marketing initiatives		
Reimbursement for non-resident loans		
Magazine article access – more comprehensive		
Reimbursement for non-resident loans		
Cataloging support – questions answered by phone		
Spearhead collaborative efforts between libraries		
Regional Reference Service		
Cultural programming by a project director		
Help staff financially to obtain Master's Degrees		
(one was left blank)		

11.) Comments (See online version of report.) 19 Responses

12.) If CMRLS had to cut back on its services in order to expand what it offers to member libraries, which of the following would you suggest be eliminated or downsized?

	Number of responses:	Response ratio:
Delivery	5	3%
Collections	68	40%
Databases	4	2%
Professional Development	6	4%
Literacy Initiatives	36	21%
Newsletter	50	30%
BiblioTemps	40	24%
Regional Reference Service	48	28%
Other, Please specify	15	9%
Impossible to choose		
Too hard to pick, many services I don't use		
None of the above		
Obviously, all of these services are important		
None		
Nothing		
NA		
Perhaps could also subsidize cost of delivery of ILLs		
It's always planned before I get out of school		
??		
Paper newsletter		
Too difficult to answer		
Not sure at this time		
Unsure		
(one was left blank)		

13.) Comments (See online version of report.)

45 Responses

14.) Which of the following trends or topics do you think are most important for CMRLS staff to keep up with in order to provide the latest information and other services and resources to members? (SELECT 3 THAT YOU THINK ARE MOST IMPORTANT.)

	Number of responses:	Response ratio:
Digital publishing (for example: e-books, e-journals, e-audio)	58	34%
Copyright/intellectual property	29	17%
Privacy legislations	19	11%

Electronic delivery (downloadable content – books, music, movies, articles)	82	49%
Information technology	110	65%
Literacy initiatives	29	17%
Community collaborations	34	20%
Community and economic workforce development	6	4%
Library education (educating future librarians)	40	24%
Online learning	49	29%
Virtual community building (collaboration via blog, wiki, instant messaging, etc.)	24	14%
Hardware	14	8%
Software	25	15%
Other, Please specify	6	4%
Statewide information literacy initiatives		
We need to be aware and adept at almost all		
Legislation advocacy		
Ed for current librarians; esp. in new tech		
Technology trends		

15.) Comments (See online version of report.)

25 Responses

16.) Are there any examples of projects that your library would like to undertake but have not been able to because you did not have the resources (staff, money, collections, technology, expertise, etc.) necessary to do so? If so, describe them specifically.

(See online version of report.) 60 Responses

17.) What services (both new and existing) would you like to see CMRLS providing 5 years from now? Please be specific and think about what you expect your library's needs to be in five years and how CMRLS can help support those needs.

(See online version of report.) 90 Responses

18.) Please use the space below for comments and suggestions you have for CMRLS that would be helpful in the strategic planning process.

(See online version of report.) 31 responses

CMRLS Strategic Planning Process

Interview and Focus Group Themes

- 1) The potential for **collaboration**: CMRLS with other regional entities, the involvement of libraries in other fields (literacy, elder services, community development), and CMRLS' role in supporting libraries to collaborate with other organizations and institutions in their communities. Also, such activities are attractive to private grant makers, especially if they support outreach and engagement of traditionally under-served populations.
- 2) While CMRLS provides a significant body of well-received services to the public libraries in the membership, the **non-public libraries** (school, academic, and special) do not feel as well served, and feel that many of CMRLS' current core services are not relevant to their needs. As part of a renewed push to serve and engage the non-public libraries, CMRLS should develop ways to harvest expertise from the non-public libraries for use by the membership.
- 3) The need for **flexibility** in terms of making resource available to libraries in the region, especially schools and other libraries where there are barriers to accessing CMRLS resources and programs.
- 4) There are challenges for libraries in finding the **balance** between maintaining services to **traditional patrons** and developing new programs and services that are attractive to **newer and younger patrons**. Further, there is a wide range of expectations and needs among the many segments of the libraries' service populations, and as part of this dynamic, the needs and expectations of some of the traditional patron constituencies are evolving.
- 5) There is the potential to develop and disseminate various **"templates" or models** that would meet several expressed needs of members. Examples include: model web pages that demonstrate both appearance and functionality, sample marketing and PR materials that can be adapted by members, etc.
- 6) There are differing opinions about the issue of **CMRLS marketing and visibility**. Some people see the value and support efforts in this area, while others either don't see the value of increased visibility for CMRLS or feel that such activity diverts resources from programming.
- 7) Member libraries need assistance with **organizational or administration issues** such as fundraising and advocacy, in addition to support with programming issues. The audiences for services in these areas include both library staff and trustees, and CMRLS should develop sustainable approaches for providing targeted one-on-one and on-site consultation.
- 8) There is a widely perceived need to change the **central reference contract** because it is under-utilized and has outlived its original rationale. Similarly, the regional collection gets only modest use, mostly by schools, and perhaps CMRLS can develop a phase-out strategy with the intermediate step of supporting collection development at the individual libraries. (Note: Any change in the regional collection must be undertaken with sensitivity toward the needs of school librarians, who already under-utilize CMRLS' other core services.)

- 9) CMRLS should develop **alternative methods and formats for delivering continuing education** in order to expand and diversify participation. CMRLS could deliver selected continuing education content in all of the following formats: standard workshop, 20-minute conference call, 90-minute web cast, and online threaded discussion. Not only would this allow for wider participation in training, but it would also generate data about which methodologies best support increased participation. After experimenting with alternative delivery methods for continuing education, CMRLS might also explore non-traditional ways of delivering other core services in order to eliminate barriers and increase utilization.
- 10) CMRLS should explore ways to **deploy staff and consultants** in order to provide **frequent on-site services**, consultation, and troubleshooting for members, and general on-call advising.
- 11) All training and/or leadership work with member libraries should be supported with some sort of **follow-up services** and consultation in order to promote effective implementation and sustainability of the key aspects of the training.
- 12) CMRLS should develop opportunities for **member networking and sharing**, including groups of various sizes and compositions, and activities and events that are structured and focused on specific topics as well as those more open-ended and informal.
- 13) In addition to serving the membership by responding to expressed needs, CMRLS also should **provide leadership** by being constantly focused on **new and emerging trends** in the field nationally and bringing them to the local level in ways that enable member libraries to understand and apply them in their libraries.

Recommendations Regarding Regional Reference

The following list presents features of the regional reference service that were identified as desirable to be negotiated into the next Regional Reference Center contract.

- 1) **Expanded training and professional development component:** Workshops are an important and well-regarded component of the regional reference service. The training component should be expanded and enhanced as follows:
 - a) An increased number and frequency of workshops, including trainings targeting the needs of individual libraries or clusters of libraries;
 - b) Alternative methods of delivering training content and follow-up technical assistance (conference calls, on-line training modules, online chat, etc.);
 - c) Training targeted to specific libraries and/or library clusters, delivered on-site at the participating libraries.

- 2) **Staffing and customer service:** There should be 2 or 3 dedicated staff to respond to reference requests from member libraries. Librarians should have direct lines of communication to these specific staff members; email addresses, direct phone numbers, etc. Their roles should be defined to include both responding to reference requests from member libraries and proactively supporting the reference function at member libraries. These staff members should have a strong customer service orientation (accessibility, responsiveness, timeliness, professionalism), and should receive training in customer service approaches.

- 3) **Improved marketing and communication:** Worcester Public Library should expand and deepen its communication with member libraries regarding reference services. This includes:
 - a) Active marketing (via print and online marketing materials) of reference related services and resources, including publicizing special reference collections that exist throughout the region;
 - b) Expanded vehicles for communicating with member libraries regarding their reference needs, including: email, online discussions and chat, IM availability, and other electronic communication.

- 4) **Better and more varied data:** The Worcester Public Library should collect, compile, analyze, and disseminate quantitative and qualitative data about library reference needs and the utilization of reference resources by members. This data collection should include an evaluation of reference-related workshops offered to members in the region and feedback on direct reference service – online, by telephone, and face-to-face.

CMRLS Strategic Planning Process

Framework for Considering Innovation in Library Services

The following is a framework that libraries can use to conceptualize and plan innovative library services in ways that will enable them to more effectively serve current patrons as well as attract new patrons by offering them new ways to interact with the library. The bulleted points under each category are examples and possibilities.

a) Different approaches to collections

- Reducing or deemphasizing the library's role as a warehouse of materials
- Emphasizing the library's role as a source for information and materials in a variety of formats
- Emphasizing the library's ability to deliver materials and information both face-to-face and remotely;
- Re-emphasizing the library's commitment to collections for children and youth;
- Asking what users want in the collections, then purchasing it. Include teens and adults in the process. Could be done in-person, online, through suggestion box, or by taking teens and/or adults on buying trips to the bookstore.
- Including new technology in the collections – wireless laptops for loan, video games for circulation, downloadable music. and MP3 players, too! – see <http://technorati.com/tag/GaminginLibraries2005> and <http://libgaming.blogspot.com/>
- Building robust digital collections and promoting them to users via publicity and training, Librarians creating solutions to manage difficult formats (PDF books that are not part of an e-book collection – what to do with these? How do we “check” these out? What are the copyright issues?)
- Storing more books to make more room for social/common spaces (see *Packing Up the Books* - <http://chronicle.com/free/v51/i43/43a02701.htm>)
- Allow end users to create collections wish lists via Amazon or online bookstore for the library
- Building portal to content for mobile devices (cell phone, blackberry, etc)
- Lists @ entrance on Plasma display w/ recently returned items or library's top 10
- Library space that includes real time news playing
- Expanded virtual content - libraries should digitize their unique materials for the rest of the world

b) The changing role of the librarian (all types of librarians: research, circulation), such as:

- Not stuck behind a desk – reference, circulation, etc. – with wireless laptop (or tablet PCs) with scanner to check patrons out wherever they are in the building; roving reference librarians.
- Staff are trained to walk with patrons to the shelves instead of standing at the desk “directing traffic”.
- Librarian as resource person who is available virtually and face-to-face – utilizing video conferencing and web based online meeting rooms to offer research help
- Librarian as educator who can help customers figure out how to select and use resources
- Librarian as community member who is interested in customers' leisure and learning interests and needs and is interested in helping people make social connections.

- Librarian as expert and “meta-expert” who can help patrons find the person with the right expertise for their needs.
- Librarian as a leader, facilitator, and guide for community people working with young children.
- Advocate and constituency-builder who is out in the community as an active member of organizations, to raise the profile of the library and communicate the library’s value. Chamber of Commerce, PTA, integration with local community groups (focused on both youth and adults); campus communities and student organizations; etc.

c) The role technology plays in providing opportunities for collaboration and networking both among patrons and between library staff and patrons.

- Wireless internet access for library computers and for users’ own hardware, and access to an IT toolpack
- Craig List in Central MA (what’s wrong with us?) But there are <http://westernmass.craigslist.org> and Boston. (Note: Morris County Library in NJ is using Craig’s List to publicize programs. They say they’ve had more 20- and 30-somethings using wireless and attending programs. <http://nj.craigslist.com>.)
- Use socialweb to post Worcester area events - <http://www.socialweb.net/?userzip=01609&userdistance=50> (free to post)
- Use RSS and feeds to offer choice driven alerts on new library resources and services
- Content portals for user groups? Offer more seamless access to content (whether digital or print) – one stop searching? Not sure if this fits here
- Use technology in programming for teens (video game tournaments, open computer night after hours, having a teen blog, teen podcasters).

d) Roles for partners

- A variety of community agencies can become a part of the library’s community space by having offices and staff in the space. – Since many libraries are short of space, this could be a great collaborative project – a building campaign for a facility large enough to house the library and the offices of the partner agency.
- Inviting them into the library and/or using their space for programming Using **their** space would open the library’s services to entirely new groups of users.
- Using partners’ expertise to support library programs and services. (For example: a Council on Aging employee might be able to work with elders in the library to help them find and use library resources.)
- Writing Center – satellite location in library; or other community services (don’t even need an office for this; just a table and signage)
- Partnering with local museums, historical societies, schools, local organizations to put up displays to promote intellectual curiosity & community connections
- Ask partners to participate in user education on site (using lab to show off their resources; hold a lecture or talk, etc.)
- Invite others into library’s strategic planning process (wiki see http://www.sannier.net/wiki1/index.php?title=Main_Page)

e) Outreach activities and events that draw traditional and new patrons to the new library spaces both individually and as groups

f) Amenities that create a welcoming environment

- “Coffee and couches”
- Cozy spaces for families to read and play together
- Collaborative spaces for work and leisure (tech enabled with power/data options)
- Designated quiet areas/non-quiet areas
- Moveable furniture in flexible spaces
- Food is allowed, including drinks with lids, and there are lots of trash cans
- A lot of light (no dark, musty, scary places)
- Restrooms with wheelchair access and changing tables
- Access to all services for disabled patrons, including equipment
- Hours that reflect needs of the community
- Appropriately-sized furniture & shelving for children
- Developmentally appropriate learning toys/manipulatives for young children
- Designated space for teenagers, designed with their input & with flexibility to be updated as the group changes.
- Group meeting rooms that have themes and ambiance (nature room – waterfall & plants; global room with maps/globe, laser light room; etc)
- Signage and displays

g) Revised code of patron conduct and behavior

- The end of “shhh,” which also means a revised code of staff conduct and performance
- The end of “no” – unless it’s illegal or dangerous behavior. (Stop saying no to things like no you can’t drink your coffee here, or no you can’t use the computer to play games, or no you can’t check out videos because you’re a child.)
- Cell phones may be used – to search the library catalog!
- We can’t change patrons behaviors, but must be flexible and adapt – see <http://www.trendwatching.com/> current issue “BEING SPACES and BRAND SPACES trends, comes packed with examples from leading brands that are having fun implementing, not just theorizing”

h) The development of “community space” (actual and virtual)

- Accommodating group activities and processes
- Opportunities for people with like interests to come together
- Online community spaces for book groups, discussions on specific topics, collaboration on creating content on local history via Wikipedia, etc. (Note: we are using a blog for upcoming National Library Week which users are encouraged to add a comment with an author or book that Changed Their World see <http://wpilibrary.blogspot.com/>)
- Build collaboration spaces in library with technology (data/power up; plasma TVs and PCs)