

ACADEMIC AND RESEARCH COLLABORATIVE

Central Massachusetts Regional Library System

STRATEGIC PLAN

2009 - 2013

VISION: ARC inspires library staff members to innovate for the benefit of their users. Our librarians will be seen by their institutions as experts in information access. By collaborating and with the use of traditional and emerging technologies, ARC libraries will provide world-class services and resources.

MISSION: The Academic and Research Collaborative (ARC) of the Central Massachusetts Regional Library System (CMRLS) is a coalition of academic libraries and public and special libraries that have research collections, working together to facilitate the sharing of resources and services for the benefit of their users.

ASSESSMENT

Members were enlisted to provide input on ARC's strengths and weaknesses as well as future directions through an online survey. The survey was available between May 15 and June 4, 2007. Sixty-seven visited the site and though there were only twelve completions, the respondents were generous with their comments and representative of the membership. A copy of the survey and responses are included in the appendices.

The survey was designed to set the stage for a more robust assessment exercise held on June 20, 2007, and facilitated by Rob Favini and Anja Smit of NELINET. Nineteen people representing seventeen institutions devoted a full day to considering ARC's future.

Salient points from NELINET's full report (which is appended to this document), are captured below.

Members of the ARC Steering Committee gathered in the North/South Auditorium at Worcester State College's student center. The meeting began with a series of short reports and presentations designed to take a look at the environmental landscape in which ARC operates.

Bob Foley, Dawn Thistle, and Irena Bond each delivered short reports summing up the work of several ARC standing committees. Rob Favini and Anja Smit followed with a brief presentation providing general information on the Web 2.0 and assessment in libraries. The final presentation was delivered by Mark Bilotta, Executive Director of COWC, who outlined recent COWC program activity and ARC's potential role in COWC.

The bulk of the morning was spent discussing the strengths, weaknesses, opportunities, and threats facing ARC as an organization. The discussion did not follow a formal strategic planning process. Rather, the structure of the SWOT analysis was followed as a quide to initiate discussion to identify specific environmental factors that impact ARC.

The discussion topics were captured on flipcharts. Each participant was then given three dot stickers. Participants used the dot stickers to vote for the discussion points that they felt were the most important. The tables below list only the highest votes received following the discussion items.

Strengths

- Sharing and collaboration
- Inter-library loan, delivery and group WorldCat
- Networking: ARC card, Interest Groups
- Continuing Education

Weaknesses

- ARC's small size makes group purchases difficult
- Lack of Interest Group activity
- ARC services may be too academic to include all members

Opportunities

- Don't reinvent the wheel; e.g. share database use guides, copyright policies, public relations activities
- Use new technologies; improve access and discovery; generate interest group activities
- Money in ARC account
- ARC's impact on the cultural life of Worcester area

Threats

- Time-starved staff's limited ability to participate
- ARC focus is not strong
- Institutional support (changing demographics, less students for academics)

Following an afternoon discussion of key issues and concerns, NELINET's report concluded that three areas should be taken into account as ARC formulates goals.

Focus of ARC

Clearly there was a feeling among the groups that ARC has lost focus as an organization. Several participants commented during discussion that it is almost as if ARC has completed all of the activities associated the transition from being WACL and must now look forward. The consensus of the meeting attendees has ARC looking to the future on very solid ground with the support of CMRLS and the cooperative spirit of COWC.

The need to revitalize ARC Interest Groups

Throughout the day comments were made concerning the lack of activity generated by ARC Interest Groups. At the same time many participants commented on the necessity of Interest Group activity to ensure a strong and vital organization. Getting time-starved staff from ARC member libraries to fully participate in ARC will be a challenge.

ARC's impact on the user community

A reoccurring topic of discussion had to do with the use of technology to better serve the various user communities that ARC libraries serve. The combination of the emergence of user centric Web-based tools and an improved relationship with COWC sets the stage for ARC to rethink, expand and enhance their service offerings.

The following goals, objectives and activities respond to these findings.

GOALS, OBJECTIVES AND ACTIONS 2009 - 2013

GOAL I. ENERGIZE ARC THROUGH STAFF AND LEADERSHIP DEVELOPMENT

Objective A. Continue to offer professional development opportunities.

Activities:

1. Participate in regular CMRLS continuing education surveys to identify staff needs.

<u>Who</u>	When	<u>Assessment</u>
CMRLS Staff	Ongoing	Written report with summary of activities and participant's
ARC members		comments

2. With the professional development advisory committee, develop offerings as appropriate.

<u>Who</u>	When	<u>Assessment</u>
Prof. Dev. Adv. Comm;	Sp 2009	Written report with summary of activities and participant's
Other Interest Groups		comments

Objective B. Use technology to enable all ARC members to participate in ARC programs, regardless of time or place, by delivering continuing education opportunities online.

Activities:

1. Investigate different technologies for providing remote, web-based access to ARC programming.

Who	When	<u>Assessment</u>
Steering Comm./CMRLS Staff	Sp 2009	1. Written report with hardware and software
		Recommendations

2. Implement a pilot program with one or two ARC Interest Groups.

Who	When	<u>Assessment</u>
Selected IG representatives,	F2010	Summary of pilot projects with participants'
to be determined		comments

Objective C. Establish a formal orientation program for new staff of ARC member libraries.

Activities:

1. Assign a sub-committee from the ARC Steering Committee and Interest Groups to develop a plan and a schedule.

<u>Who</u>	When	<u>Assessment</u>
Steering Comm/IC	members Fall 2008	Subcommittee is formed.

2. Implement the orientation.

<u>Who</u>	When	<u>Assessment</u>
Orientation subcommittee	Fall 2008	Issue annual report with summary of activities and
		participants' comments

Objective D. Develop a mentoring program for new directors of ARC member libraries.

Activity

1. Implement the mentoring program.

<u>Who</u>	When	<u>Assessment</u>
Orientation subcommittee	As new directors are hired	Issue annual report with summary of activities and
		participants' comments

GOAL II. DEMONSTRATE ARC'S IMPACT ON THE COMMUNITY.

Objective A. Promote and demonstrate ARCs expertise in information literacy and assessment

Activities:

1. Investigate the sponsorship of an information literacy/assessment symposium for the greater ARC community, including audiences such as faculty members and administrators.

Who	When	<u>Assessment</u>
Reference IG	S2010	Planning is begun

2. Hold the symposium.

<u>Who</u>	When	<u>Assessment</u>
Ad hoc symposium plar	nning committee/	
Reference IG	S2011	Survey feedback with participant comments

Objective B. Promote and demonstrate ARC's expertise in cutting edge technology.

Activities:

1. Develop and promote an annual conference on emerging technologies, including audiences such as faculty members and administrators.

Who	When	Assessment
Prof. Dev. Adv. Committee & CMRI	LS S2009	Develop the plan and include an implementation schedule
2. Hold the conference		•
Who	When	<u>Assessment</u>
Prof. Dev. Adv. Committee	S2010	Survey feedback with participant comments
3. Develop and promote an "Ask	the Expert" blog.	
Who	When	<u>Assessment</u>
Selected ARC member(s)	S 2009	Survey the users

Objective C. Promote ARC's traditional resource sharing services.

Activities:

1. Assure that all resource sharing library staff are aware of emerging developments/software.

Who	When	<u>Assessment</u>
Customer Service Interest Group	S 2009	Written report with summary of proposed
·		Technologies
2. Review existing resource sharing	/ cross borrow	ving services to identify areas for improvement
Who	When	Assessment
Customer Service Interest Group	F2009	Written report

Objective D. Investigate existing opportunities for promoting ARC among all relevant constituencies.

Activities:

- 1. Survey Interest Groups and Committees to identify appropriate events and venues for promoting ARC libraries, librarians, and services.
- 2. Survey members to identify new opportunities with organizations such as COWC, museum associations, and others.
- 3. Place two articles or announcements each year.

<u>Who </u>	When	<u>Assessment</u>
Communications Committee	2009	Written report with summary of activities

GOAL III. STRENGTHEN SHARING AND COLLABORATION AMONG ARC MEMBER LIBRARIES

Objective A. Create a clearing house of ARC members' documents, including policies, pathfinders, planning documents, etc.

Activities:

1. Assign a committee, including a CMRLS Staff member, to determine content and formats.

<u>Who</u>	When	<u> Assessment</u>
Steering Committee	F2008	Committee is formed

2. Publish and update the ARC resources web page.

Who	When	<u>Assessment</u>
Communications & CMRLS	2009	Page is created

Objective B. Continue to provide interpersonal networking opportunities.

Activity:

1. Plan and implement at least one social opportunity each year.

Who	When	Assessment
Steering Committee	Annual	event held

Objective C. Continue to seek opportunities to develop and expand ARC members' collections to serve the collective needs of our users.

Activities:

1. Identify and implement at least one collection-related project, for example a JSTOR inventory.

<u>Who</u>	When	<u>Assessment</u>
Collection Management	2009	Written report with summary of activities including usage
		statistics

2. Encourage and implement appropriate recommendations of the collection management interest group.

Who	When	Assessment
Collection Management	2009-10	Written report with a set of recommendations

3. Seek to expand cost-effective access to resources by negotiating contracts in collaboration with other consortia such as MCCLPHEI or Waldo.

Who	When	<u>Assessment</u>
ARC Directors; Collection		
Management	Ongoing	New subscriptions

METHODOLOGY

The need for ARC to develop a new strategic plan was discussed by steering committee members in the spring of 2007. Subsequently, a survey was prepared and promoted. A full day retreat built upon survey outcomes. A planning committee was designated to use the learning of the retreat to develop goals, objective and activities. The committee included:

Irena Bond, MA College of Pharmacy and Health Sciences, ARC chair Robert Foley, Fitchburg State College
Donald Hochstedtler, Worcester State College
Monica McCarter, Atlantic Union College
Carolyn Noah, Central MA Regional Library System
Dawn Thistle, Assumption College

The draft plan was circulated and reviewed by ARC members in September and voted upon on September 28, 2007.

APPROVAL

Approved by the ARC Steering Committee
Irena Bond, Chair
September 28, 2007
Date

ARC PLANNING SURVEY RESPONSES (Total survey responses: 12)

1.) What do you consider two or three of ARC's strengths? (12 responses)

- 1. The opportunity to network with other academic librarians in our area; ARC card (access to other college libraries for our faculty)
- 2. Interlibrary Loan & Cross Borrowing; SIGS
- 3. Wealth of resources that can be shared; diversity of institutions in the collaborative
- 4. Collegiality; A concern for each library; Sharing ideas
- 5. Communication; Sense of belonging
- 6. Collaboration among member libraries; Support and facilitation of CMRLS; Long history of working together
- 7. Help librarians learn from each other by facilitating educational opportunities; Helping fund initiatives
- 8. Networking with other Directors which facilitates smooth communications when collaboration is necessary
- 9. I like the collaboration of the various SIGs; it helps me keep pace with trends and ask questions
- 10. Continuing education possibilities; Networking
- 11. This is a group response from the Management Team at UMass Med.: For us, the delivery system is most important; It's close relationship to CMRLS and the MBLC

2.) What are ARC's weaknesses? (10 responses)

- Redundancy of purpose for those of us who also attend many C/W MARS and MCCLPHEI meetings
- 2. Licensing partnerships seem lacking
- 3. I miss the special interest group (ILL committee, circ committee, reference committee) meetings
- 4. I don't know if the costs are evenly shared
- 5. None known
- 6. Declining interest on the part of some library directors to provide leadership; Difficulty in identifying our consortial purpose
- 7. It seems to be run mostly by directors. More involvement in planning by front-line library staff might be better.
- 8. The meetings can bee too long without any decisions being made. Small libraries do not have enough time to spend at meetings.
- 9. Meetings often are scheduled for times of the year when librarians are busiest with regular duties
- 10. Some of the services are "out of scope" for our needs as a special library, so for us it is good that the service and fee structures are "cafeteria style". However, where some of the services might be "nice" for us to have, their pricing discourages us from signing up for them. It also means that we lend/send more books/articles to ARC libraries than we borrow/receive.

3.) What two or three opportunities should ARC take advantage of – in our environments, communities or on our campuses? (10 responses)

- 1. Locally hosted professional development for non-MLS staff...no one else offers this specifically for academic library staff
- 2. Licensing with vendors; Cross consortium interfaces so that access between schools is easier
- 3. -
- 4. MBLC activities/grants; Joint purchases of services
- 5. Willingness to learn and changes in the library and political world
- 6. We need to find ways to work with COWC (is this a turn-around or what?) to show students the value of libraries in the Worcester area. Maybe we could market our resource sharing services better brag about the speed of ARC ILL, cross-borrowing, etc. This may be the service that our users appreciate the most.
- 7. School libraries (and public libraries, too) want to work with us and learn from the academics help facilitate these connections; Many of us are willing to spend time, work one-on-one teaching others from the other campuses how to use specific software help facilitate these connections.
- 8. I'd like to see as many collaborative/consortium purchases for databases and other software as possible.
- 9. Continuing publicity of the benefits of libraries to area patrons; Researching opportunities to attract new staff to shared positions if several libraries only need or can afford additional or replacement staff on a part time basis.
- 10. Staff expertise to plan/offer training. (The programs in April 2006 and April 2007 were excellent examples of that.)

4.) What factors in the environment are threats to ARC? (10 responses)

- 1. see #2
- 2. Not sure what this question is getting at
- 3. Too many other organizations putting on similar programs (NERCOMP, NELINET, ACRL, NEC...) there should be a way to coordinate efforts with these other groups rather than compete with them for attendance.
- 4. Each institution has different size budgets
- 5. No answer
- 6. Disinterest a feeling that ARC does not contribute to some libraries' bottom line, therefore, why spend time with it? CMRLS itself may be a threat because it really provides services that save \$\$, and also because it helps run ARC so well that there is less incentive to do the work that keeps ARC going.
- 7. Distance between campuses (time for travel) and lack of overall "free" time for training on the part of library staff.
- 8. -
- 9. The increase of duties at individual libraries often prevents librarians from devoting the time and attention that ARC cooperation requires
- 10. Other consortia may better meet our needs

5.) To what one or two developing trends in the library field should ARC be positioned to respond? (9 responses)

- 1. Cooperative collection development related to print items...the JSTOR project this year was a good start.
- 2. ?
- 3. Social networking in higher education
- 4. Hardware and software technology advances for service delivery; Changes in job duties/responsibilities (staff and professional)
- 5. Threats to library freedom
- 6. We could work together to develop ideas for integrating new technologies into our individual libraries' services; (Continue to) Help with space issues libraries are now intellectual gathering places. How can we help each other to develop or enhance this? (The JSTOR journal project has potential in this by allowing us to free up needed space.)
- 7. Seeing information literacy in the K-20 arena, as a continuum; Help libraries market and promote their services to faculty, staff and students, and most elusively the administration!
- 8. Technology; Communication
- 9. Greater emphasis on sharing staff among libraries. ARC may need to explore increasing its own staff to make people available to member libraries during times of staff vacancies or vacations.

6.) What professional issues should ARC address? (10 responses)

- 1. Developing supervisory skills for non-MLS staff
- 2. ?
- 3. Staff visiting other institutions to learn how things are done the same or differently than they do at their institution; Job swap for a few days or a week probably during the summer months more of a push for this.
- 4. I'd like us as directors to get a better understanding of the future of print items (books, journals, etc.) Some sort of rationale should be used when it comes to major decisions. This could be through a discussion and or workshops. We don't have to get into storage or planned collecting. I would rather discuss current thinking and be able to develop local guidelines.
- 5. Involvement of more academic library staff
- 6. We should look at professional leadership, not just organizational leadership. How can we develop our staffs (at all levels) to provide leadership within the consortium and the profession as opposed to only our own libraries?
- 7. Librarian burnout too much to do, too little time in the day.
- 8. Copyright; Professional ethics
- 9. Attracting and retaining new librarians
- 10. Rapid technology change and its effect on libraries; How can libraries adapt/serve needs

7.) Does your involvement in ARC meet your expectations? (11 responses)

Yes -8 (73%)

8.) If you answered "yes" to question 7, how does your involvement in ARC meet your expections? (8 responses)

- 1. see #1
- 2. I think the SIGS are very good.
- 3. e-mail discussion lists, special committee work, and attendance at workshops/programs
- 4. Hands on experience by discussing issues with fellow directors
- 5. I'm busy and ARC fits into my schedule, usually
- 6. I have lots of opportunities to participate and make suggestions and influence the group. But at this point, I wish that more people were as involved.
- 7. I'm well informed (via email) of happenings in the community. I'm invited to regular meetings, socials, etc.
- 8. Interaction with other professionals.

9.) If you answered "no" to question 7, why doesn't your involvement in ARC meet your expectations? (3 responses)

- 1. I don't tend to learn as much from my ARC peers
- 2. The pace of duties at my local library often prevents or impedes me from spending adequate time with ARC activities
- 3. Largely because our library is so specialized, we are not able to make a significant contribution to the work of the group.

10.) Does your library's involvement in ARC meet your expectations? (11 responses)

11.) If you answered "yes" to question 10, how does your libraries involvement in ARC meet your expectations? (8 responses)

- 1. See #1
- 2. Interlibrary loan and cross borrowing work well.
- 3. Cross borrowing cards
- 4. Staff involvement with interest groups
- 5. Making us aware and giving us the opportunity to attend educational events
- 6. My staff know that they are encouraged to attend any ARC meetings and events. They know that they are free to take on leadership roles within ARC, and do so from time to time.
- 7. Our library is well represented in the decision-making process and collaborates with other libraries to make decisions (e.g., journal weeding/JSTOR project.)
- 8. I believe that staff overall are highly involved with ARC especially given competition from local duties

12.) If you answered "no" to question 10, why doesn't your library's involvement in ARC meet your expectations? (3 responses)

- 1. We are very out of synch with most of their concerns since we are a different kind of institution (we are a 2 year school they are mostly 4 yr + graduate.)
- 2. Time constraints most likely
- 3. Largely because our library is so specialized, we are not able to make a significant contribution to the work of the group.

13.) Comments? (5 responses)

- 1. I like the Interest Group approach to committees...staff can attend what is interesting to them without regard to exact current job function and without feeling like they have to attend the same committee meetings forever.
- 2. IF we are going to submit a strategic plan (while it will help individual libraries with their planning) I sincerely hope we as a consortium can get something/grants from the MBLC. This is and has been a time consuming and expensive activity so I would like to see concrete results.
- 3. CMRLS has already provided or is working on developing solutions to many of the areas mentioned above. We need to bring them down to the ARC level and take more ownership of them as academic libraries.
- 4. It would be nice if ARC sponsored more global professional development/continuing education seminars.
- 5. We would like to see ARC offer more training for academic library staff. CMRLS' training opportunities are excellent for more general library topics.



ACADEMIC AND RESEARCH COLLABORATIVE STRATEGIC PLANNING MEETING

June 20, 2007

SUBMITTED TO ARC STEERING COMMITTEE

JUNE 26, 2007

NELINET, Inc. 153 Cordaville Road Southborough, MA 01772



Overview

The following report captures information from the ARC Strategic Planning Meeting held on June 20, 2007 at Worcester State College. The meeting was facilitated by Robert Favini and Anja Smit of NELINET Consulting Solutions.

This document reports on the following

- Meeting recap
- SWOT discussion
- Identification of key areas for ARC to concentrate while setting goals

Meeting Recap

Members of the ARC Steering Committee gathered in the North/South Auditorium at Worcester State College's student center. The meeting began with a series of short reports and presentations designed to take a look at the environmental landscape in which ARC operates.

Bob Foley, Dawn Thistle, and Irena Bond each delivered short reports summing up the work of several ARC standing committees. Rob Favini and Anja Smit followed with a brief presentation providing general information on the Web 2.0 and assessment in libraries. The final presentation was delivered by Mark Bilotta, Executive Director of COWC, who outlined recent COWC program activity and ARC's potential role in COWC.

SWOT Discussion

The bulk of the morning was spent discussing the strengths, weaknesses, opportunities, and threats facing ARC as an organization. The discussion did not follow a formal strategic planning process. Rather, the structure of the SWOT analysis was followed as a giude to initiate discussion to identify specific environmental factors that impact ARC.

The discussion topics were captured on flipcharts. Each participant was then given three dot stickers. Participants used the dot stickers to vote for the discussion points that they felt were the most important. The tables below list the discussion points captured and the count from the voting exercise.

Strengths	Votes
Sharing and collaboration	6
Inter-library loan, delivery and group WorldCat	6
Networking: ARC card, interest Groups	5
Continuing Education	4
Support for staff; interest groups, ListServs, continuing education, casual networking (pick up the phone)	3
Support: CMRLS, librarian peers, ListServs	2
Large/small library collaboration	2
(Strengths Continued)	

Collective expertise	2
Multi-library membership	0
Joint purchasing of materials (data bases)	0
Fiscal control; don't have to go to COWC to spend money	0
Have an established account with money in it	0
CMRLS assistance with grants, grant writing	0
Dues structure under ARC; getting more for less	0
Era of good feeling	0

Weakness	Votes
ARC's small size makes group purchases difficult	11
Lack of interest group activity	9
ARC services "out of scope" (too academic?)	8
Interest group structure not well defined	4
ARC depends too much on CMRLS (ARC members need to do more)	3
CMRLS has limited capacity	2
Don't collaborate enough with other consortia	0

Threats	Votes
Time starved staffs' limited ability to participate in ARC	14
ACR focus, is it strong?	11
Institutional support (changing demographics, less students for academics)	5
Viability of NELINET	3
Reliance on state funding	1
Staff turnover – vacancies	0
Vendor consolidation on marketplace	0

Identification of key issues and concerns

The afternoon was spent using information gained from the SWOT exercise to identify topic areas and specific issues that are of concern to ARC. Attendees were divided into three groups (Red, Green and Blue) and instructed to use the information taken from the morning session to develop key areas of focus when formulating goals for ARC's planning document.

Group reports are captured below:

Red Group:

To capitalize and leverage our diverse strengths for the benefit of all members and constituents

- Identify unique strengths
- Increase program participation
 - Utilize our experts
- Market our services

To investigate opportunities to better engage staff in ARC activities

- Increase participation
- Measure effectiveness of groups
- Gather/collect grass-roots input

To maintain and expand collaborative opportunities

- Gathering data for assessment
 - List current projects what works-what doesn't
 - How can we improve
 - Pilot program
- Investigate current technologies in document delivery (Odyssey. Relais) to improve speed and availability
- Identify snags in system of document delivery

Green Group

Increase professional development opportunities

Strengthen Interest Groups

Investigate collaboration with other consortia (e.g. database purchase)

Promote ARC within region/county (COWC Social Web)

Increase Networking within ARC

- Re-engage directors in evolving new directions for ARC
- o Repositories of policies and documents
- Use listsery for sharing concerns & ideas

Explore new technologies to better serve our individual constituences

Explore assessment strategies & tools

Advocate as ARC (campaign) information literacy importance to administrators

Blue Group

Energize ARC through staff and leadership development

 Institute ARC orientation to highlight all member libraries in ARC to new member libraries & new staff members of existing libraries

Generate more participation in Interest Groups

Expand informal mechanisms to promote networking

Create mechanism to facilitate sharing of programs & documents among libraries

Review, assess, and enhance services to ARC patrons and identify funding sources

Conclusions

Reports from the Red, Green, and Blue teams identified areas that should be taken account when ARC formulates goals. Not surprisingly, several themes emerged which are listed below:

Focus of ARC

Clearly there was a feeling among the groups that ARC has lost focus as an organization. Several participants commented during discussion that it is almost as if ARC has completed all of the activities associated the transition from being WACL and must now look forward. The consensus of the meeting attendees has ARC looking to the future on very solid ground with the support of CMRLS and the cooperative spirit of COWC.

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ARC's impact on the user community

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