



STRATEGIC PLAN

July 1, 2016 – December 31, 2020

Introduction

Strategic planning is the systematic process of envisioning a desired future, and translating that vision into broadly defined goals and a sequence of steps to achieve them.

Since the advent of the iPhone in 2007, the way that people gather and work with information has changed dramatically. Considering these technological changes, consolidations within the Integrated Library System industry, and changes in the local library communities, in the library profession, and in the world at large, it is crucial for Cooperative Computer Services (CCS) to seriously evaluate if the needs of its stakeholders are being met.

This strategic plan is meant to be used as a roadmap for meaningful change. The ultimate goal of the plan is to transform CCS into a modern, nimble, and forward thinking organization to better support its member institutions, all without losing sight of providing a reliable, cost effective service.

Background

CCS has traditionally created a long range plan that was more tactical in nature. Given the change in Executive Director in April 2015 coupled with the rapidly changing nature of library technology, it was important to conduct a more expansive, visionary plan.

Consulting Within Reach (CWR), an analytical consulting company focused on nonprofits, was hired to help facilitate the process and analyze the situation and influential factors. CWR specializes in developing and fostering best practices within the nonprofit world. Based in the San Francisco area, they have ties to both Stanford and some of the most cutting edge technology companies. The planning process was kicked off in November 2015, and was officially approved by the CCS Governing Board on July 27, 2016. This plan will be effective from July 1, 2016 through June 30, 2019.

Approach to Planning

CCS utilized a Long Range Planning Committee to help guide the process, choose a consultant, and review draft documentation. The members of the committee were: Su Bochenski, Chair (Lincolnwood), Kathryn I. Martens (Crystal Lake), Matt Womack (Ela), Kaye Grabbe (Lake Forest), Catherine Lemmer (Lake Forest), Jim Scholtz (McHenry), Kate Hall (Northbrook), and Carol Dolin (Zion-Benton).

The selected consulting company, Consulting Within Reach (CWR), conducted interviews with the Long Range Planning Committee, CCS Library Directors, CCS staff, and related organizations like RAILS. The main purpose of these interviews was to gather information on current state of affairs, pain points, needs, and trends.

The information gathered through the interviews was consolidated and analyzed by CWR, who used the data to create the broad strategic initiatives of the plan. After receiving the analysis from CWR, the Long Range Planning Committee, CCS Executive Director, and CCS staff provided input to create the full strategic plan.

Revisiting the Plan

In September 2018 the Long Range Planning Committee revisited the strategic plan. The members of the committee were: Kate Hall, Chair (Northbrook), Karen Danczak Lyons

(Evanston), Kathryn I. Martens (Crystal Lake), Su Reynders (Lincolnwood), James Scholtz, McHenry, Rebecca Wolf (Winnetka) and Matt Womack (Ela).

The committee found that many activities had been completed, including the yearlong ILS migration, which was a major goal of the strategic initiative A: Shore Up Current Value of CCS. The committee also determined that there were enough unfinished activities to warrant extending the current plan.

This revised version of the plan updates existing initiatives and identifies new goals in Initiative B: Formalize CCS Posture.

Mission, Vision, Identity

Mission: What is the problem that you are trying to solve?

Vision: What does successfully solving that problem look like?

Identity: Who are you as you pursue that Mission and Vision?

Mission and the Historical Moment

An organization's mission is dependent on its historical moment: the set of challenges, changes, and opportunities it faces in the world. What problem you are trying to solve depends on your environment.

There are profound differences between CCS's historical moment 40 years ago and today center around culture of reading, technology and access, demographics, and cost.

The core problem of the original moment was **cost**. Forty years ago, we knew what should be built, the blueprint, and required tools: it was just that the price tag was too expensive for everyone to do it by themselves.

The core problem of this new moment: **relevance** (in addition to cost): The future is unclear; the available tools are changing at dizzying fashion; and there is no tried and true blueprint for everyone. The old era is fading but the new is yet to be fully unveiled. CCS's mission should reflect this accordingly. It has a new problem to solve: **a relevance problem, in addition to a cost problem.**

Current Mission

- Provide patrons of member libraries access to a shared catalog
- Provide library staff with cost efficient ILS management

Add to Mission

- Guide libraries in the adoption of technology necessary for continued relevance
- Serve as the hub for libraries for the collaboration and learning necessary to unveil the future

CCS provides access to shared, cost effective library technology and serves as a collaborative learning hub to unveil the future.

Vision and Why Clarity of Vision Matters

Vision represents successfully solving the problem. Vision thus also determines metrics: what you measure to tell if you are getting closer to a solution? Imagine how CCS metrics would change if there were also emphasis on the latter: circulation of books AND circulation of ideas, or uptime of system AND time to market with new initiatives.

Current Vision

- A stable, reliable, and user friendly experience for patrons to have access to resources that they desire

Add to Vision

- Libraries are drawing from a broad array of cost effective technology to reinvent themselves in a host of creative ways
- Discoveries are being shared across libraries, promoting innovation and efficiency.

CCS promotes innovation and efficiency among member libraries, and delivers a reliable, user-friendly experience for library users.

Identity and Implications of Identity

The current identity of CCS is of a software administrator and caretaker of data. Given the changes afoot in the industry and beyond, it is important to add the concept of catalyst to the identity. In this case, CCS should move toward a stance as catalyst of shared learning between libraries around technology and relevance.

CCS itself is a technology support and learning agency. It is not a library itself. As such, the immediate stakeholders of CCS as an **organization** are the library directors (and staff). Patron perspectives must shape important decisions around certain CCS products like the catalog (see more on this below); but library directors are the stakeholders of CCS organizational issues (i.e., budget, staffing, strategy).

The CCS technology focus should be centered on patron experiences (versus any and all technology issues). Consider what you imagine when you think of the ideal *software administrator* versus the ideal *catalyst of learning*, and how this shapes the answers to the following:

- How you develop your current staff
- What kind of behavior gets rewarded
- What you promote to external audiences
- What additional skill sets are needed on the team

Assessment

Consulting Within Reach identified eight areas in their assessment:

1. "Relevance" issue

2. Funding constraints
3. Need for training
4. “What’s out there?” uncertainty
5. New building and renovation trend
6. Patron-centric vs. Staff-centric Focus
7. E-books and media
8. Existing strengths

1-Relevance Issue:

Libraries know they need more “relevance,” but the field is unclear about the precise definition and especially the recipe. Each community will probably require different definitions and recipes. The field is thus in a state of searching for ideas: experimentation, innovation, testing, and learning are paramount – all in a decentralized fashion. The two constants in all the efforts: redesign of space and utilization of technology. Technology especially feels critical because multiplicity of options, rate of change, and lack of expertise/training among some librarians. One key implication: libraries who try to figure this out alone do so at great risk.

2-Funding Constraints:

Funding constraints are driven by the State fiscal condition and local property value declines. Implications for CCS include: some directors feel uncertain about long term future of RAILS (given dependence on state funding). They feel that CCS’s role as a long term collaborative hub is critical. Libraries need to justify themselves: data can/should be helping this effort. Pursuing cost efficiencies: both in CCS internal costs (so member contributions don’t have to rise) and also delivering cost savings to member libraries.

3-Need for Training:

Training needs can be broken down into two major areas: ILS core functions and sharing of best practices as they relate to ILS. Training around the ILS is critical because current competency levels in core functions are very uneven and awareness of the ILS system potential if best practices were followed is low. In addition, staff turnover means there is knowledge leak, and staff turnover creates a need for effective onboarding in general (ILS training is a helpful framework for that onboarding).

Training focus should be on not only how to use the system, but also how to leverage the system to obtain desired results – e.g., report types, faceted searches. Given the widespread geography of CCS libraries, a flexible location approach in training is important. Onsite (at Library) for highly contextual issues facilitates the training process and gets CCS “out there” to learn those contextual issue. A central location would be helpful for specific functions where gathering of peers and shared learning across libraries facilitates the training process.

4-“What’s Out There?” Uncertainty:

“What’s Out There?” uncertainty refers to the question of where library technology is going and how libraries should best move forward as technology rapidly evolves. There is a strong desire among member Directors for CCS to play the role of guide amidst technological uncertainty. It is important to clarify in what ways CCS can realistically play that role. Areas in which there is a need for technology leadership include: resources (i.e., streaming media, e-books, e-zines), operations (i.e., analytics, search, discoverability, reporting), programmatic offerings (i.e., Maker Space, technology classes, etc.), and/or

space redesign and utilization (i.e., connectivity, collaboration). CCS can plausibly play role of guide in the first two areas, and possibly the third, but less likely on the fourth issue.

5-New Building and Renovation Trend

The majority of CCS members are somewhere in the process of either renovating or constructing a building. Given the fundamental importance of this for their local communities, these building related initiatives dominate most directors' mental landscape in the near future. Because of this, the implications for CCS in the near future are that Directors are in mode of making a case to the public and other decision makers. ILS data can and should help in this effort – but this is not happening currently. Requests to directors for contribution of energy/time will be competing with pressing urgency of building related issues.

6-Patron-centric vs. Staff-centric Focus

A patron-centric perspective is espoused by everyone in CCS – and heartfelt by directors especially. However, by virtue of job responsibilities, different points of view exist on this topic, particularly between technical services and library leadership. These points of view stem from the historical roots of CCS. CCS came into being around back end staff needs. It never started with a clear and shared definition of a desired patron experience as the driving goal of all CCS efforts. Moreover, some of the key drivers of CCS decision-making are removed from the daily level of patron experience (i.e. directors and catalogers and IT types). Unless that desired patron experience is explicitly named and agreed to, there is the risk of an unintentional organizational drift towards staff-centric perspectives. CCS needs a “north star” (shared understanding) of patron experience to prevent this drift.

Some areas that came to light in the analysis include: existing dissonance between the Catalogers Technical Group and the Governing Board; lack of statistical standards, metrics, and reporting processes; and a question of what is the cause of certain notions of the system. These notions include:

- Is there a problem with the ILS system customization capacity or the state of the data?
- Is the issue one of data *quality (as patrons experience it)* or data *consistency (as catalogers define it)*?
- There is an assumed strong correlation between the two – is that a valid assumption?
- Most importantly: what is the “North Star?” What are we aiming for?

The patron experience should be the ultimate judge.

Examples of a Patron Experience “North Star” are:

- Search results match expectations (especially for e-media)
- Make patron experience seamless
 - Easily navigable catalog
 - Search to hold in 1 click
- Relevant resources
 - Collections that match community needs
 - Resource types used by community - “e”, streaming
- Uniformity of experience
 - Should not have to search one place for e-books and another for physical books
 - How much should CCS libraries offer the same experience to patrons? Does the CCS brand convey something useful to patrons?
 - Experience of mobile and responsive design

7-E-books and Media:

E-books and media are important because they are key areas of growth, evolution, and struggle for everyone. If CCS doesn't take the lead in this, it risks becoming marginalized. Furthermore, the field risks becoming fragmented as everyone pursues individual solutions.

Current challenges with e-books and media are: cataloging and search, consortium licensing, and CCS cannot edit the catalog entries supplied by licensors, which often are poorly cataloged (SIRSI has promised this function but not delivered).

8-Existing Strengths:

In facing the issues listed above, CCS has some meaningful strengths already in place:

- Strong culture of collaboration among Directors
- Expertise and leadership experience in Directors
- Hunger for change and growth
- Trust in Executive Director, Christopher Holly, and his initial track record of changes
- Leaner CCS in place with motivated staff

Initiatives, Goals, Activities, and Targets

The strategic initiatives, goals, activities and targets are the outcome of the data-gathering process, and comprise the core of the strategic plan.

Strategic Initiatives

The strategic initiatives guide our actions in allocating financial resources and staff time. They do not eliminate efforts in other areas, but they receive the most focused attention of all the activities we undertake for the next three years. These initiatives are based on the results of the analytical consulting.

- A. Define, Increase, and Demonstrate the Value of CCS (previously: Shore Up Current Value)
- B. Formalize CCS Posture
- C. Increase Shared Learning
- D. Make the Data Useful
- E. Answer the “What’s Out There?” question
- F. Consider Structural Reorganization
- G. Develop a Clear Digital Content Strategy

Goals

Goals are designed to focus on what the CCS stakeholders, member libraries, and ultimately patrons receive, and not on the resources that CCS needs to deliver the service. Goals include the identity of the target group, and how that group will benefit from the initiatives identified.

Potential Activities

Potential activities are meant to illustrate possible actions CCS will complete in order to meet the goals of the plan. These potential activities are not intended to be absolute or inclusive, but rather realistic suggestions that reflect the current library environment. As part of the implementation plan, these activities may be further detailed as relevant to each Technical Group. As the environment changes, and more information is discovered during the research phase of each activity, changes are possible. The aim of the activities is to meet the identified goals.

Targets

Targets are the way that CCS will measure its progress toward reaching goals. Additional targets may be forthcoming and dependent on an investigation. Measurements will be reviewed and adjusted annually.

Strategic Initiative A: Define, Increase, and Demonstrate the Value of CCS

Goal A1: Build greater trust between the various components of CCS (i.e. the CCS Staff, the CCS Technical Groups, CCS Executive Director, and CCS Stakeholders/Directors) with a focus on the reliability and cost effectiveness of CCS services.

Completed Activities & Targets

- Modernize the infrastructure with an emphasis on system stability through initiatives such as colocation, automated monitoring, cleanup old firewall settings, establish VPN connectivity for libraries, evaluate and implement new internal ticketing system, update website.
 - Colocation – completed May 2016.
 - Automated monitoring – completed January 2016.
 - Firewall and VPN work – Firewalls updated, VPN no longer needed
 - Evaluate and implement new internal ticketing system -- January 2017 – June 2017.
 - Develop plan for and update website, with a focus on delivering online learning tools – July 2017 – June 2018.
- Investigate and define “data quality” issue: investigate and define the real issue between data consistency, software functions, patron expectations, and staff expectations.
 - a. ILS profiling decisions took into account data quality research and findings as well as system needs. Profiling was completed in September 2017.
 - b. CCS has operationalized ongoing review of data quality standards and input guides.

Current Activities & Targets:

- Monitor and regularly report on system performance to hold Polaris to a high standard.
- Develop Service Level Agreement for Libraries by March 2020
- Define ROI of member fees for current and potential members by June 2019
- Update CCS hardware and office infrastructure by November 2019

Goal A2: Establish a Patron Experience “North Star” and operationalize this into CCS business process.

Completed Activities & Targets:

- Partner with SWAN on usability study initiative in 2016.
- Regularly discuss the patron experience at CCS membership meetings.
- ILS selection and migration was completed with a focus on patron experience.

Current Activities & Targets:

- Implement bite size user testing opportunities with interested libraries in July 2019.
- Operationalize gathering and incorporating patron feedback by February 2020.
- As part of staffing evaluation, recruit a user experience specialist to bring additional expertise to CCS staff. Plan in February 2019 in preparation for 2019-2020 budget.

Goal A3: Project Laulima – Determine ILS needs to best support CCS and identify system cleanup needs.

Completed Activities & Targets:

- Needs analysis and education on ILS options March 2016 – June 2016.
- The Project Laulima team recommended ILS architecture to the Governing Board by July 2016.

- RFP written based upon needs analysis July – August 2016.
- Evaluated RFP responses and selected system October 2016 – November 2016.
- Negotiate contract in December 2016 – May 2017.
- Implement system May 2017 – April 2018.
- Develop list of cleanup needs along with recommendations by December 2017.

Goal A4: Investigate and establish best practices across the system. Develop a program to share findings and implement findings across libraries.

Completed Activities & Targets:

- Identify existing best practices in acquisitions workflows. Share findings across the membership, and work with libraries to implement more efficient practices. Highlight acquisitions best practices at an August 2016 showcase.
- Work with the Project Laulima code consolidation team and the Database Management Task Force to identify potential policies for standardization by December 2017.
- Several high priority processes were streamlined during the migration, and many policies were standardized per Database Management recommendations.
- Further review of best practices has been operationalized, including ongoing review of data entry standards.

Goal A5: Evaluate CCS office space for either subletting or reconstructing to include large enough meeting space for 50.

Completed Activities & Targets:

- Work with leasing agents to determine options
- Created a central training space for up to 16 attendees and meeting space for up to 20.

Current Activities & Targets:

- Determine best option when lease ends in 2023. Begin research in 2020.

Strategic Initiative B: Formalize CCS Posture

Goal B1: Develop agreed upon prioritization of focus for CCS time and resources.

Completed Activities & Targets:

- Assessed CCS staffing based on identified priorities in the strategic plan.
- Reallocated resources to better meet those identified needs.
- Created a master schedule and targets for CCS staff time spent on meetings, library visits, support, and special projects.

New Goal B2: Determine ideal membership size strategy.

Current Activities & Targets:

- Assess ideal membership size based CCS goals and values, staffing and costs, and geography by June 2020.
- Determine membership strategy by December 2020.
- Develop criteria for membership, reflected in membership application, by December 2020.

New Goal B3: Evaluate utility of centralized cataloging services.

Current Activities & Targets:

- Gauge member interest in centralized cataloging services by June 2019.
- Based on member interest, outline potential models for service by March 2020.

Strategic Initiative C: Increase Shared Learning

Goal C1: Foster greater collaboration and peer-to-peer communication by integrating continuing education into existing meetings.

Completed Activities & Targets:

- Develop a list of educational topics and presenters for Technical Group meetings and present at July 2016 Governing Board meeting.
- Designate 30-45 minutes in each group meeting to continuing education with a mix of CCS-led, library staff-led, and professional expert-led sessions.
- Operationalized identifying potential learning opportunities and set expectations for CCS staff.

Goal C2: Engage library staff in decision-making using an asynchronous, online tool to facilitate information exchange and shared learning.

Completed Activities & Targets:

- Experimented with online educational tools prior to group operational decisions to present background, encourage discussion, and solicit feedback about the issues prior to any group votes. Determined this is not ideal in the current CCS environment.
- Developed portal to facilitate information sharing.

Goal C3: Develop and implement an onboarding and training curriculum.

Current Activities & Targets:

- Create content for CCS 101 in FY 2019. Present this group course quarterly for newly hired staff at all levels.
- Create a training toolkit for each service area including relevant procedures, self-assessments, online learning tools by the end of FY 2020. Operationalize working with experts within each service area to update existing procedures as needed.

Goal C4: Develop annual training priorities based on perceived and observed need.

Completed Activities & Targets:

- Operationalized the development and release quarterly training schedules based on observed and reported needs beginning July 2018.

Strategic Initiative D: Make the Data Useful

Goal D1: Develop a clear framework around reporting.

Completed Activities & Targets:

- Eliminate outdated or redundant statistical categories. For example, reporting on inside NSLS ILL versus outside NSLS ILL is no longer useful. Timing in conjunction with ILS (re)implementation and to be completed by June 2018.
- Fully transition CCS libraries to BLUEcloud Analytics and away from Directors Station (timing dependent upon SirsiDynix roadmap), if remaining with SirsiDynix.
- Create training sessions on how to use the available reporting tools, ranging in skill level from the gamut of canned reports to customizing reports.
- Create prioritized list of potential report needs at the administrative level no later than February 2017 (prior to Data Summit). Revisit after the Data Summit in case it sparks ideas.
- Redesigned web reports to better incorporate documentation.

Current Activities & Targets:

- Hold a Data Summit for Directors that covers the range of data available for reports, offers a show and tell of existing Board reports used, solicits feedback for other reporting needs, and identify best practices. Fall 2019.
 - A. Develop a shared understanding of group or statewide data needs, e.g., IPLAR and per capita.
 - B. Create systematic approach to solicit report feedback and report requests at administrative and operational levels.

Strategic Initiative E: Answer the “What’s Out There?” Question

Goal E1: Develop stronger CCS-wide expertise in relevant technological developments.

Completed Activities & Targets:

- ILS investigation process examined vendors with different development approaches and considered system architecture options.
- CCS staff focus is on developing deep expertise in Polaris.
- Developed broader list of professional development opportunities for CCS staff, looking outside of previously attended events.
- CCS News has been identified and used as a tool to highlight successes and forward-thinking initiatives within libraries.
- Library staff advisory groups developed as an opportunity for library staff to develop greater ownership and contribute to the direction of CCS initiatives.
- CCS staff regularly evaluate new tools for online learning and collaboration.

Strategic Initiative F: Consider Structural Reorganization

Goal F1: Develop a more efficient governance.

Completed Activities & Targets:

- Redefine the Database Management Model to reflect the current and changing nature of print and electronic materials processing.

Current Activities & Targets:

- Work with a consultant to investigate and evaluate current structure. Make a recommendation to improve organizational structure. Make a recommendation by September 2019.
 - Define roles and responsibilities of Governing Board and Executive Committee.
 - Define the nature and charges of other Committees and Groups.
- Update the CCS Bylaws by December 2019.

Strategic Initiative G: Develop a Clear Digital Content Strategy

Goal G1: Determine whether it is more advantageous to CCS member libraries to maintain digital content in their current environment or centralize through CCS.

Completed Activities & Targets:

- Improve discovery layer for digital content to promote better search results based on purchasing decision.

Current Activities & Targets:

- Document library use of digital content and procedures for managing non-integrated econtent records by October 2019.
- Research system-wide single sign on options such as EZ Proxy or Open Athens. Make a recommendation whether to pursue a tool by September 2019.
- In FY19-20, evaluate existing group purchases and determine whether centralized acquisitions of digital content would be beneficial to members.

Evaluation Process

This plan is designed to be flexible and responsive to changes in the economic, demographic or political climate. The strategic initiatives and goals are broad enough to allow for necessary modifications to the activities that are carried out. All activities are defined as “potential” in order to allow changes to the plan as needed. CCS management will work closely with the Governing Board and its respective committees prior to finalizing and implementing all activities over the next three years.

Reporting progress toward meeting the goals and targets will be a regular part of board meetings. In order to aid this progress, an implementation plan (Appendix A) will be utilized. The implementation plan is the document that will be regularly updated to allow for changes in the potential activities and timeline.

For Future Consideration

Evaluate and make recommendation on legal organization designation.