



***Strategic Plan
2004-2007***

**Final Version
July 6, 2004**

NELINET STRATEGIC PLAN AT A GLANCE

VISION. NELINET will be regarded as the premier regional library consortium in New England, and highly regarded nationally as a dynamic and entrepreneurial organization providing a variety of collaborative services to member libraries. NELINET will provide the highest quality member services, and will employ state-of-the-art methods and technologies to harness the rich array of library resources for our members so they can provide optimal programs and services to their users.

MISSION. NELINET creates opportunities for connections, collaboration, and cooperation among members to shape the future of New England libraries, museums, historical societies, and other related information organizations in the evolving information environment.

ORGANIZATIONAL VALUES. NELINET will: provide the highest quality of member services; provide expertise to our members; encourage collaboration and resource sharing; demonstrate and encourage innovation; provide leadership; engage in and enable continuous learning; demonstrate effective stewardship; encourage participation

GOALS

- To promote the application of new technologies to advance the goals and objectives of members
- To increase member productivity and develop staff abilities
- To enhance inter-organizational cooperation
- To ensure organizational viability

PROGRAM AND SERVICE CRITERIA

- **Provide increased value for our membership by:** responding to a predicted or an expressed need of members (or a substantial subset thereof); increasing cooperation or reducing redundant efforts among members to create increased operational functionality; building upon existing NELINET programs; building upon current staff core competencies or not requiring a substantial change to expand or build new competencies; providing the opportunity for NELINET to be “best in class” for our members for the services we provide (i.e., the services will be of the high quality, timely, reliable, and economical); or, becoming more valuable or less costly as more members use the program or service over time.
- **Build NELINET as an organization by:** strengthening our reputation as a library consortium; performing work that is best accomplished by a non-profit consortium rather than by a commercial vendor; generating program management costs that are reasonable, manageable, predictable, and sustainable; or, showing strong promise to contribute toward the financial stability of NELINET.

ORGANIZATIONAL SUCCESS FACTORS

- **Member-Driven Factors:** anticipate and respond to member needs; generate critical mass; create flexible membership and financial models; take prudent risks; build partnerships.
- **Organization-Driven Factors:** maintain a high quality staff and a robust technology infrastructure

PROGRAM SUCCESS METRICS

- **Program and Service Delivery.** NELINET will provide responsive and high quality programs and services for members as demonstrated by: enabling members to participate fully in our programs and services, with minimal or no barriers created by geographic location; providing significant opportunity to increase membership participation in all programs and services over the period covered by the strategic plan; enabling effective employment of affinity groups to deliver programs and services that are customized to meet the special needs of different market segments; and, employing effective use of current technologies to deliver high quality programs and services, either onsite at NELINET or remotely.
- **Member Evaluation.** Demonstrate strong value of services to our members by ensuring that: all programs and services receive consistently strong evaluations as measured through formal surveys, evaluation forms, and focus groups; educational events will be in high demand and will be well attended; and, all programs meet or exceed their annual revenue goals.



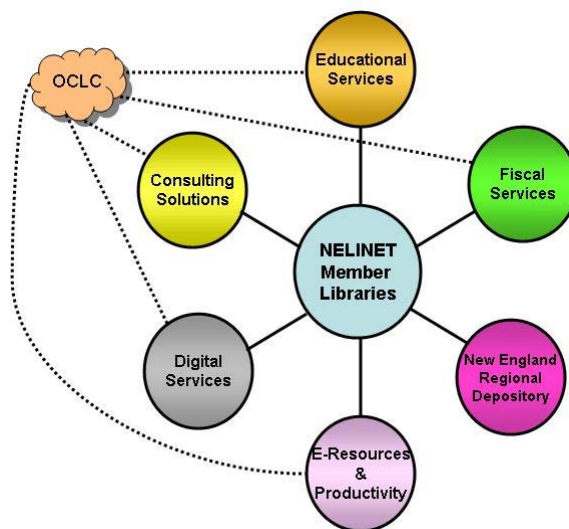
Strategic Plan: 2004-2007

Final: July 6, 2004

WHO WE ARE

NELINET is a member-owned, member-governed consortium of more than 650 academic, public, school, and special libraries in the six New England states. The NELINET charter is

- to promote the advancement of libraries;
- to promote the advancement and dissemination of knowledge and information;
- to facilitate sharing of library and information resources and services;
- to cooperate with charitable, educational, scientific, and other library organizations, institutions, agencies or consortia, whether public or private, in developing and/or providing library and information services for the public welfare;
- to develop and encourage activities which enhance regional and national library, information and educational resources and services; and
- to promote rapid and efficient access to and delivery of information and library resources.



Today, NELINET accomplishes these purposes by providing a broad variety of services to its member libraries, including educational and consulting services, group purchasing, and serving as the New England regional network for OCLC services.

VISION

NELINET will be regarded as the premier regional library consortium in New England, and highly regarded nationally as a dynamic and entrepreneurial organization providing a variety of collaborative services to member libraries.

NELINET will provide the highest quality member services, and will employ state-of-the-art methods and technologies to harness the rich array of library resources for our members so they can provide optimal programs and services to their users.

MISSION

NELINET creates opportunities for connections, collaboration, and cooperation among members to shape the future of New England libraries, museums, historical societies, and other related information organizations in the evolving information environment.

ORGANIZATIONAL VALUES

- **Provide the Highest Quality of Member Services.** We will provide sustainable, affordable, and ready access to services that are tailored to the evolving information needs of members.
- **Provide Expertise to Our Members.** We will continually demonstrate our value to our members by providing a high level of expertise in current and emerging information services.
- **Encourage Collaboration and Resource Sharing.** We will serve as effective vehicle for members to: share their resources, services, programs, and ideas; and leverage their purchasing power through group efforts; and, reduce the risk for individual members.
- **Demonstrate and Encourage Innovation.** NELINET is committed to bringing new services to New England, making members aware of best practices, and encouraging innovation among our members.
- **Provide Leadership.** NELINET is committed to providing leadership for our members to improve professional practices throughout New England.
- **Engage in and Enable Continuous Learning.** NELINET is committed to the belief that continuous learning is essential in a rapidly changing world.
- **Demonstrate Effective Stewardship.** NELINET is committed to the effective use of the resources that members entrust to us.
- **Encourage Participation.** We will provide opportunities for member participation and engage in open communication in our decision-making and governance.

CHALLENGES AND GOALS

Challenges for NELINET: The information environment will continue to change significantly and rapidly. Information seekers are looking for information in different ways. Users are moving rapidly toward greater user self-sufficiency, immediacy, and seamlessness in their information access, and they have more choices through web-based systems. Many information organizations are increasingly providing information primarily or solely in electronic form. To deliver their services, members not only need increasingly robust technology infrastructures, but also greater flexibility and responsiveness built into their processes, services, and organizational structures. A lack of data format standardization for emerging forms of information will imperil progress by

members in their attempts to integrate intellectual assets. Other outside forces will continue to affect the information environment, such as issues related to privacy, digital archiving, authentication, security, and digital rights management.

Goal 1: Promote the Application of New Technologies to Advance the Goals and Objectives of Members. NELINET will encourage the development, adoption and application of new technologies so members can advance their organizations by providing services that expand their role beyond being acquirers or repositories of commercially-available information so they can become effective content generators and managers.

Objectives:

1. Provide innovative programs that enable members to take control of their information environment through regional development of appropriate opportunities, such as open access, institutional repositories, digitization of local collections, development of a system for local loading and live access/archiving of electronic journals, expansion of virtual reference services, and cost-effective digital archives.
2. Guide members to enable their organizations to establish processes that enable the effective exchange of ideas and information for digital content generation and management.
3. Provide regional leadership to implement integrated information services for e-learning communities, such as library portals and course management software.
4. Address critical issues in the ownership, licensing, rights management, dissemination, and pricing of information through publications, conferences, seminars and other media.
5. Build upon our experience to create opportunities to provide members with business planning and marketing services for alternative digital publications.
6. Develop relationships with vendors of digital services to provide value-added services to members, such as convenient point of contact, one-stop billing, contract assistance, including project specifications, quality control, and problem resolution.
7. Develop the New England Collections Online (NECOL) to grow a digital community that promotes collaboration among New England cultural institutions and increases access to valuable cultural heritage materials.
8. Deploy cost-effective electronic self-service tools that enable members to better control their costs and achieve highly responsive services.

Challenges for NELINET: Information organizations are more economically-challenged than ever before. Members are constantly seeking new ways to improve their productivity management. Their organizations are also undergoing constant change, and therefore they need better ways to hire, retain or retrain highly adaptable staff who possess the necessary managerial and technological abilities and skills to adapt quickly.

Goal 2: Increase Member Productivity and Develop Staff Abilities. NELINET will facilitate the efforts of members to achieve maximum productivity, to adopt best operating practices, and to develop the abilities and skills of their staff to meet the challenges facing their organizations.

Objectives:

1. Provide customized consulting, educational services, and productivity tools so members can operate effectively and efficiently and they can adopt the best practices in their organizational structures, workflows, processes, and technology deployment.
 2. Provide members with outcome-based methods, tools, educational programs, and consulting services to measure, assess, and communicate the value and effectiveness of their operations and services.
 3. Employ electronic and distance learning technologies so members can participate in educational offerings in an effective and efficient manner so they can cultivate knowledgeable and capable staff.
 4. Provide a significant amount of educational programming at distributed locations throughout the region, and explore opportunities to work with state library agencies to develop and deliver educational sessions of widespread interest on topics and emerging importance.
 5. Enable members to obtain services from NELINET through high-quality technology-enabled systems (e.g., to place or renew orders, review their membership records, see the status of a request).
 6. Develop collaborative services (such as the Electronic Resource Licensing Services) so members can make best use of the expertise available from NELINET and thereby reduce their own operating costs.
-

Challenges for NELINET: Members can no longer “go it alone” but must find new partners with whom to collaborate in their own institutions and across institutions. NELINET members face New England resistance to collaboration, and there has traditionally been a generally low level of state-wide funding to foster such collaborative efforts.

Goal 3: Enhance Inter-Organizational Cooperation. NELINET will leverage our position to be the primary regional convener and facilitator for intra-institutional and inter-organizational cooperation.

Objectives:

1. Advance partnerships among current and potential members, and serve as a catalyst to work with leading institutions outside of the region.
2. Pursue and foster partnerships with other appropriate communities, professional groups, societies and organizations that share our interests so we can better leverage resources and advance the agendas for all parties.
3. Actively explore broadening our core membership beyond libraries to encompass other information and technology related cooperative organizations.
4. Explore the opportunity to create a New England-wide interstate ground delivery system, which would be a hub-and-node system joining existing systems within each state.
5. Explore customization and delivery of services to significant subsets of our members through the effective use of the affinity groups.
6. Act as a regional, national, and international advocate for changes to the information environment, and thereby enable members to be better able to shape their futures.

Goal 4: Ensure Organizational Viability. NELINET will ensure the stability and sustainability of NELINET through the development of diversified revenue and effective fiscal management

Objectives:

1. Revise our membership categories and dues, fees and rates structures to reduce barriers to membership, to encourage greater participation by current members, and to spur the addition of new members.
2. Ensure NELINET's organizational sustainability through a multiyear financial strategy that continues to provide members with high-quality OCLC services while enabling NELINET's long-term financial independence from OCLC-related revenues.

CRITERIA FOR ADDING, CHANGING OR ELIMINATING PROGRAMS AND SERVICES

The following are our criteria for identifying whether a product or service is appropriate for NELINET. When analyzing whether to add, expand, or eliminate a program or service, we will consider these factors in the aggregate, rather than individually, to determine whether the program or service does, can or will do the following:

Provide value for our membership by:

- responding to a predicted or an expressed need of members (or a substantial subset thereof);
- increasing cooperation or reducing redundant efforts among members to create increased operational functionality;
- building upon existing NELINET programs;
- building upon current staff core competencies or not requiring a substantial change to expand or build new competencies;
- providing the opportunity for NELINET to be “best in class” for our members for the services we provide (i.e., the services will be of the high quality, timely, reliable, and economical); or,
- becoming more valuable or less costly as more members use the program or service over time.

Build NELINET as an organization by:

- strengthening our reputation as a library consortium;
- performing work that is best accomplished by a non-profit consortium rather than by a commercial vendor;
- generating program management costs that are reasonable, manageable, predictable, and sustainable; or,
- showing strong promise to contribute toward building the financial stability of NELINET.

ORGANIZATIONAL SUCCESS FACTORS

Member-Driven Factors

- ***Anticipate and Respond to Member Needs.*** We must continuously listen to our members so we are able to lead and prepare them for the changes they are facing. To accomplish this, NELINET must engage our members in a continuous dialog, such as through site visits, surveys, focus groups, and summit meetings. We also must continually evaluate and modify our programs and services so they remain responsive to member needs (such as by expanding the topics and the delivery formats for our educational offerings).
- ***Critical Mass.*** We must ensure that there is sufficient critical mass among our members to ensure the success of any programs we intend to develop or provide, and to demonstrate to members the significant value they will receive through their participation.
- ***Membership and Financial Models.*** We must develop alternative membership and pricing models to ensure that our pricing structure is not a barrier to wide participation in NELINET programs and services. The revenue generating structure must ensure that NELINET is fair, affordable, sustainable, predictable, and fosters a sense of ownership among our members.
- ***Take Prudent Risks.*** We must continue to take prudent risks that will generate membership benefits while ensuring that we are effective fiduciaries of member resources.
- ***Build Partnerships.*** We must develop partnerships with other information organizations in the region (such as state libraries, other consortia, and other information and technology-based organizations) so we can minimize redundant efforts and develop joint programs and services that provide members with maximum value.

Organization-Driven Factors

- ***Quality of Staff.*** We must regularly invest in NELINET staff recruitment, development, and retention to ensure that we can provide members with a high quality and professional staff that is capable of meeting their information needs.
- ***Technology Infrastructure.*** We must regularly invest and upgrade the NELINET technology infrastructure to continue to provide cutting-edge technology for direct member service delivery

PROGRAM SUCCESS METRICS

Program and Service Delivery. NELINET will provide responsive and high quality programs and services for members as demonstrated by:

- enabling members to participate fully in our programs and services, with minimal or no barriers created by geographic location;
- providing significant opportunity to increase membership participation in all programs and services over the period covered by the strategic plan;
- enabling effective employment of affinity groups to deliver programs and services that are customized to meet the special needs of different market segments; and
- employing effective use of current technologies to deliver high quality programs and services, either onsite at NELINET or remotely.

Member Evaluation. Demonstrate strong value of services to our members by ensuring that:

- all programs and services receive consistently strong evaluations as measured through formal surveys, evaluation forms, and focus groups;
- educational events will be in high demand and will be well attended; and,
- all programs meet or exceed their annual revenue goals.