

# Strategic Plan

## New York Metropolitan Reference and Research Library Agency (METRO) System Plan of Service

Five-Year Library Plan of Service  
*Prepared by Louella V. Wetherbee*

### Sections

1. Basic Information
- 1A. Introduction to the Plan
2. Governance
3. Description of Member Input on Policies
4. Description of Planning, Evaluation, Revision, and Approval
  - Planning Activities
  - METRO System Plan Evaluation
  - Amendment Process
  - Approval Process
5. Mission Statement
  - Resource Sharing
  - Technology Services
  - Special Client Group Needs
  - Professional Development/Training
  - Awareness and Advocacy
  - Communication Among Member Libraries
  - Cooperative Efforts with Other Library Systems

### Section 1: Basic Information

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E-mail Address: [dhiebing@metro.org](mailto:dhiebing@metro.org)  
URL [www.metro.org](http://www.metro.org)  
Date of Establishment: Absolute Charter Date: 1964 (6/26/64)  
System Service Area: 742 square miles  
Population: 8,197,430  
Type of System: Reference and Research Library Resources System  
Minimum Staffing Requirements: N/A

### Section 1A: Introduction to the Plan

Introduction and Background to the Five-Year Plan of Service.

This document contains the new Five-Year Plan of Service prepared by METRO, with the active and ongoing collaboration and input of the METRO Board, Executive Director, member library representatives, special member groups, two METRO planning teams, special interest groups, focus groups, and the Plan consultant, Lou Wetherbee. The Plan outlines the proposed plan of action for system programs and services. It takes into consideration METRO's current programs goals and accomplishments, current and emerging member needs, existing and potential technology tools and resources, as well as state requirements for systems.

The Plan was developed over the course of the year and involved numerous meetings, conference calls, briefings, interviews, and visits. The actual goals and elements of the plan are a product of intensive collaboration between the METRO staff, the two METRO planning teams and the consultant.

While several key technology goals are outlined in Section 2 (Technology), this plan includes many innovative and appropriate use of technology in many of the other system program elements. Therefore, the plan should be read, in total, as both a system plan of service, and a developmental technology plan.

The METRO planning process included the following core components that were utilized both as a comprehensive framework and as a roadmap for the development of specific aspect of the plan.

- A continuing environmental scan and assessment
- A thorough analysis of member needs based on a variety of techniques
- A thorough study of the trends in library products and services
- A commitment of the planning group to recognize and build from METRO's existing strengths
- A working strategy that depended on member and staff definition and creative input, with consultant revision and suggestion.

## Background to the Plan of Service

The current environment for libraries is characterized by an almost unprecedented rate and amount of change. Libraries of all kinds are struggling with new technologies, changing user communities with multiple cultural and language abilities, demands for new and different kinds of services, decline in demand for some traditional services, and a rapidly changing staffing landscape where there are fewer new library school graduates than are needed and mature library professionals are retiring in large numbers.

The key points that define the planning process are these:

- Robust and ongoing member input effort
- Thorough analysis and review of needs in the field
- Frequent check-ins with Board and updates on progress
- Integration of the “technology plan” into the entire Strategic Plan with an integral set of goals
- Building from METRO’s existing position and strengths.

These member strengths include the Professional Development program; METRO’s Internet skill and web presence; Metro’s experienced, skilled and committed staff; the member Directory; the Document Delivery program; a commitment to sharing resources (traditional, electronic, and human expertise); strong support of member technology initiatives; and a willingness to experiment, take reasonable risks, and develop pilot projects.

METRO has supported member technology and resource sharing very strongly through distribution of retrospective conversion and other grants, through the sharing of expertise, through training and education, and in many other ways. As libraries move beyond the initial phase of library automation and conversion of records to more varied and more complex automation initiatives, METRO will continue to stand with and support its members. METRO libraries have converted very large numbers of records over the years, and while many catalog records are still in traditional formats, it will be important to shift more resources to resource sharing efforts such as Z39.50 and to newer digitization efforts.

**NOTE: METRO members have converted, as of 1999 (RBDB Report), 34,798,800 records, with 13,483,814 yet to be converted.**

## Brief Narrative Summary of Major Goals Outlined in the Plan

This section outlines, at the top level, the goals of METRO for the coming five years. Each section outlined is detailed in Section 4.

### Resource Sharing

#### 1. Help Members Share Costs

METRO will focus on helping members share costs of electronic resources, as well as traditional ones, by inventorying member database resources, analyzing needs and gaps, identifying non-duplicative ways to fill those gaps, support local digitizing efforts, assist libraries with policies and tools to effectively manage electronic information, and provide alternative/back-up server storage for member resources.

METRO also recognizes that it is important to share traditional resources and bibliographic tools and will continue to utilize appropriate state and other resources, both public and private, to assist libraries to complete their transition to a fully automated bibliographic services environment.

#### 2. Facilitate Access

METRO will promote and facilitate access to resources by educating members about policy issues, legal issues and technology issues which affect access; will collect and share with members all kinds of information about collaborative databases resources within METRO’s region and about opportunities and needs; will enhance the ability of staff members in METRO libraries to make effective use of electronic resources to maximize return on member investments in information resources; will assist members to build or improve the effectiveness of individual and shared portals and information gateways; and will enhance by putting online an inventory of regional licenses databases, adding into it information about policies, contents, overlap and digital rights.

METRO will also represent METRO members’ interests in the developing statewide database initiatives such as NOVEL to try to ensure that they are maximally for Metro library customers.

Recognizing the growing interest in and potential value of locally digitized information, METRO will demonstrate and then actively assist members with local digitizing efforts through the creation of a demonstration capability in a METRO laboratory. METRO will also assist members in promoting and marketing locally digitized assets and will provide alternative and/or back-up storage for local member digital archives. Given the rich resources in METRO libraries because of the rich historical, cultural and language diversity of the New York metropolitan area, this role is an important endeavor for METRO.

#### 3. Evaluate Document Delivery Services

In light of the increasing access to electronic information that is available to member libraries and to their customers, it is incumbent on METRO to study courier usage patterns and statistics for the purpose of understanding member delivery

needs and encouraging “on call” delivery as a cost effective option; consider any improvements that may be prudent and affordable to the physical delivery system (tracking); create a member task force to develop a profile of materials being delivered by the courier service and to assess the feasibility of substituting electronic delivery for some of the currently delivered items.

#### 4. Assist and Support Members to Streamline Local ILL Operations.

METRO can best serve members by educating them regarding emerging ILL options, including peer-to-peer software and strategies; by compiling and distributing electronically, METRO member ILL policies; by assisting members to acquire and install peer-to-peer systems; and by sponsoring conferences or other events to tackle the issues of ILL operations, standards, policies and legal changes; and by purchasing software or services to assist members with digital rights management.

### Technology Services

#### 1. Broker and Provide Consulting Services

METRO will contract on behalf of members for software and support contracts; will offer product and vendor showcases; will add contract or regular employee assistance to provide full time support to members around technology needs; and will look at ways to take advantage of Internet services via live technical support over the WWW.

#### 2. Facilitate Resource Sharing Peer-to-Peer

METRO will continue to support member resource sharing by promoting Z39.50 and related standards-based software, by educating members about these options to expand access, by offering grants to purchase the software, by installing peer-to-peer software at METRO, and by evaluating improvements to resource sharing through Z39.50 in the METRO area.

### Needs of Special Populations, including Hospital Libraries and Small Libraries

#### 1. Facilitate Efforts of Hospital Libraries to Effectively Market and Position Their Services

Recognizing the needs of smaller libraries, particularly those libraries in the Hospital Library Services Program (HLSP), to more effectively position the library internally, METRO will develop marketing tools including a custom newsletter service, offer pre-designed marketing materials with templates, and provide expertise and training on marketing.

#### 2. Support Education and Staff Development Needs of Smaller Libraries

Based on an understanding of METRO member needs, the System will provide a targeted and customized set of training opportunities (see plan details in Section 5, part 3.), will distribute, where possible, these training opportunities into the field, will make use of Continuing Education Certification Units (CEU's) to increase participation, and will build or acquire CME courses that hospital libraries can offer internally.

#### 3. Extend the Effectiveness of HLSP Staff

Create and make available to member libraries a variety of templates for local use, including statistical reports, accreditation and marketing materials.

### Professional Development

#### 1. Continually Assess Member Needs in the Area of Professional Development

METRO will improve the evaluation of training to adapt and create better training programs and to target specific customers with training of interest to them. This effort will depend on the creation and maintenance of a METRO customer database with an initial focus on PD customers and their needs. The System will also move toward streamlining registration and payment for courses over the web, and will continue to develop alternatives to classroom instruction, including use of METRO's existing video facility, online and other means of delivery.

#### 2. Deliver More Training to Members in Their Local Environments

METRO will accelerate development of video and web courses to deliver more training at a distance; will use existing courses and cross-brand them as METRO courses; will use proven methods of recognized trainers to shorten the time to market; help METRO librarians become better trainers and facilitate library course development; act as a “clearing-house” or catalog for locally produced library course ware and promote both METRO and METRO member courses outside the METRO region and state.

#### 3. Facilitate Technology Education among METRO Members

Technology education for libraries will be ever more critical for their success. METRO will educate, inform and demonstrate authentication software, customization software, multilingual software, digitization, and workflow software to help members (including vendor exhibits). Wherever possible, METRO will accomplish this in direct partnership with its own members and other strategic partners such as NYLINK. METRO will also keep its own training lab up to date and will endeavor to identify other training labs in partner organizations that will benefit METRO's members.

#### 4. Focus on the Development of Library Marketing Skills

Because of the rapid changes in METRO's environment, it is critical that METRO assist its own internal staff and staff of member libraries to improve their strategic marketing and product development skills. METRO can perform a real service by bringing attention and high quality programs and training opportunities to improve the competitiveness of libraries, with special attention to their development of customer-centered services. METRO should transfer its own knowledge

and skills in this area, as well as that of member libraries who have relevant experience, to the rest of METRO's libraries, using the most efficient means possible.

#### **Awareness and Advocacy**

##### **1. Enhance the Capabilities of METRO Libraries to Promote and Advocate for Library Services**

METRO can help libraries in this critical emerging area by developing, or adapting from other sources, a set of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

##### **2. Enhance Library Advocacy at Local and State Level**

Advocate for libraries and library systems in the METRO region, cooperating with other local professional organizations, and addressing the concerns of METRO libraries to appropriate state and local legislators and other officials.

##### **3. Enhance Library Advocacy at the Federal Level**

METRO will promote and encourage participation in federal level library related legislative activities, sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives and, most importantly, collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

#### **Improve Member Communication to Encourage Resource Sharing**

Promote and encourage effective use of all member information resources, services, and expertise

METRO is committed to using the most modern and effective means to communicate with members and to assist members to do the same. They plan to accomplish this by creating a METRO electronic community environment with the initial step of moving the METRO Member Directory to the Web in order to make it more accessible, enrich the information it contains, and ensure its currency. In addition, METRO will build on current efforts to create an in-house database of METRO customers (individuals within member libraries, vendors, friends and partners of METRO, and other METRO stakeholders) that includes information about their preferences, requests, services utilized, etc.

Over the longer term, METRO will facilitate the seamless interoperation of members through supporting and facilitating the development of METRO's e-community, gradually integrating more access, links and resources, as well as linking METRO's own resources to other libraries, inside and outside the region. Adapting the experiences of other metropolitan area systems, METRO will move toward a 24/7 expertise sharing capability with online reference and customer assistance. METRO may be able to capitalize on its early adoption of using electronic means to share human expertise by offering its own experience and/or services to other organizations.

#### **Cooperate with Other Library Systems**

##### **1. Support and Complement Other Systems**

METRO will continue its collaborative approach in developing services by complementing rather than duplicating services whenever possible. There will be a particular effort to work collaboratively in the area of licensed or acquired information resources among METRO member libraries in order to identify the various aggregators and systems with which METRO should cooperate more closely. METRO will continue to build on a successful collaboration with NYLINK, will continue to take an active and vigorous role in statewide efforts to design a state electronic virtual library, and will continue active participation in relevant state and regional consortia including the 3Rs Council, and other New York state groups. METRO will cooperate wherever possible and will focus development efforts in areas where there is a possibility to use METRO's strengths in a unique way.

#### **Section 2: Governance**

Bylaws and Dues Structure

Please see Attachment A.

B. Organizational Chart

Please see Attachment B.

#### **Section 3: Description of Member Input on Policies**

A. & B.

The role of Committees, Advisory Councils, and Coordinating Councils in advising the Board of Trustees is contained in the written charge to each group. Those charges are included in the METRO Rosters. (Please see Attachment C.)

#### **Section 4: Description of Planning, Evaluation, Revision, and Approval Process for All Elements of the Plan of Service**

##### **METRO System Plan Evaluation**

The Metro plan has been developed with a high level of member input and review at all stages of the process. Members have had a series of opportunities to contribute, critique and comment on various components of the plan. Evaluation of the plan will have these comments:



Ongoing reports, written and oral, by the Director and her staff, to the Board and members of METRO, with feedback opportunities.

Continued input to specific plan components by METRO SIGS as the plan rolls out, with continuing revision, and updating based on member contribution.

Web surveys conducted by Metro staff to ascertain interest in, and satisfaction with, various plan components, including initially the revised Metro Web site and the new Metro online directory.

At least one printed or telephone survey of members during each year of the plan which allows members to evaluate the usefulness of one or more of the specific programs which METRO offers in the Strategic Plan (to begin in Year Two of the 5 Year Period). At least one outside evaluation of METRO's performance against the plan within the first three years. This may be conducted by the State Library and/or an outside consulting group. Evaluation of METRO's service indicators on an ongoing basis to determine, overtime, which programs are having the desired effect, (example: measure increase in use of METRO web site by METRO members before and after the new site is introduced, test knowledge of CE participants after participation in METRO classes). Measures will be dictated by METRO staff in consultation with Board.

#### Amendment Process

Information from the system plan evaluation processes will be forwarded by the Executive Director to the Executive Committee on a semi-annual basis. That committee will use it to assess progress in accomplishing the plan and in amending and revising the Plan of Service. They will forward changes to the Board of Trustees for change and approval.

#### Approval Process

The New York Metropolitan Reference and Research Library Agency Plan of Service was regularly reviewed by the Board of Trustees and the Executive Committee during development. It was then submitted to the Executive Committee for final approval.

### Section 5: Mission Statement, Goal Statements, Activities and Intended Results

#### Mission Statement

METRO's mission is to serve all types of libraries in the five boroughs of New York and Westchester County, and to assist members to work together to meet the research and information needs and interests of its members and users. METRO is committed to sharing the resources of both information and expertise, to professional development, and to advocacy on behalf of its members. METRO is a unique entity through which members coordinate and relate. METRO is future-focused and proactive in response to needs and technological changes.

**NOTE:** METRO's System Plan of Service is based on a thorough review and analysis of the current system programs and services, current and emerging member needs, and existing and potential technology tools and resources. While several key technology goals are outlined in Section II (Technology), this plan proposes innovative and appropriate use of technology in many of the other system program elements. Therefore, the plan should be read, in total, as both a system plan of service, and a developmental technology plan.

#### I. Resource-Sharing (including Cooperative Collection Development, Delivery, Interlibrary Loan, and Other)

**GOAL 1:** Identify, acquire and make available cost effective access to shared information resources, both traditional and electronic.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Inventory available electronic information resources among all METRO member libraries. (2) Conduct web based-member needs assessment for database group purchase of commercial electronic resources. (3) Contract for and/or license resources which fill gaps for METRO member libraries.

Intended Results: (1) Better information will be available about the resources in METRO libraries, improving knowledge of these resources and increasing access to them by library users. (2) The library staff will be knowledgeable about the changing nature of intellectual property issues that affect access to information. (3) Members' resources will be most effectively deployed with the least duplication.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Outsource and/or negotiate contracts for members' highest priority commercial electronic resources, with particular attention to filling gaps. (2) Survey members to identify locally produced, already-digitized information resources. (3) Move the METRO Member Directory to the Web in order to make it more accessible, ensure its currency, and enable libraries to print copies of the Directory on demand locally. (4) Create opportunities for collection development librarians to meet and discuss availability of unique and specialized print or audiovisual collections that might be more cost effectively shared among members.

Intended Results: (1) More information will be available to METRO members that they might not otherwise be able to acquire. (2) Members will be aware of the existence of locally important materials not otherwise available. (3) Members will share mutual knowledge about specialized resources, collections, policies, and personnel.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Evaluate the success of shared database access projects through standard web statistical and analysis tools so that future expenditures can be based on use of existing resources and/or contract for the creation of appropriate software to make it easier to track use of electronic resources by members. (2) Make available and promote to all members the locally produced digitized electronic resources of member libraries.

Intended Results: (1) Evaluation of shared database access and use will provide guidelines for future spending and resource selection. (2) Local collections will be accessible, while standards are ensured.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Increase the number and variety of licensed electronic resources available to members, including access to non-bibliographic databases, multimedia resources on the Internet, as well as fee-based, full-text resources. (2) Promote the availability of locally digitized, METRO member resources to the larger world. (3) Provide local electronic storage capability for METRO members through the acquisition and roll-out of a METRO server farm. (4) Link METRO member electronic resources, local and remote, to the online member directory.

Intended Results: (1) Members will have access to important local, global, specialized, and lesser used materials that may not be otherwise available to them. (2) Assist METRO libraries to capitalize on their collections and provide local materials to a much wider audience. (3) Members can share the cost of archiving, maintaining and providing access to locally produced, digitized information. (4) Facilitate easy access to these resources from the METRO web site.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Evaluate the outcome (costs, benefits, results) of collaborative database purchases and shared access to locally-digitized resources.

Intended Results: Identify subject areas where gaps exist in the shared resources offered to members so that they may be filled through shared purchases.

GOAL 2: Facilitate database access for the METRO community.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Facilitate members' purchase of web auditing software. (2) Collect, analyze, and disseminate data on already existing services (e.g. WALDO, NY Link, Empire Link). (3) Use METRO training avenues to disseminate information about availability of databases to improve members' capability to take best advantage of shared resources. (4) Participate in emerging statewide, electronic shared-access services, such as NOVEL, by representing the needs of METRO members to appropriate statewide bodies

Intended Results: Increase knowledge among members about existing electronic resources and the means to access these resources. Build knowledge among METRO member library staff about available resources to ensure their maximum use. Provide improved, cost efficient access to a greater number of electronic resources. Help METRO members benefit from any appropriate state funded resources.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Help members improve local and/or shared gateways and portals bringing together all kinds of electronic resources and making them easier to use. (2) Building on the inventory of electronic full text resources owned and/or licensed by members, add to the inventory additional information about the policies, content, overlap, access requirements, digital rights, and related information. (3) Participate in emerging statewide electronic shared access services, such as NOVEL, by representing the needs of METRO members to appropriate statewide bodies.

Intended Results: Provide improved, cost efficient access to a greater number of electronic resources. Help member navigate effectively in this complex environment. Help METRO members benefit from any appropriate state funded resources.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Negotiate for additional-licensed databases and/or outsource to other aggregators the acquisition of additional electronic databases. (2) Participate in emerging statewide electronic-shared access services, such as NOVEL, by

representing the needs of METRO members to appropriate statewide bodies. (3) Demonstrate alternatives for digitizing local resources.

Intended Results: Provide improved, cost efficient access to a greater number of electronic resources. Help member libraries make use of statistical data reflecting the use of databases by their own users. Help METRO members benefit from any appropriate state funded resources.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Assist members to acquire statistical information about the use of all METRO subsidized databases so that local libraries can benefit from this knowledge. (2) Find ways to promote and market the locally digitized assets of METRO libraries, especially those of importance and relevance in the system area. (3) Install a METRO sponsored digitization facility to support local digitizing efforts. (4) Provide additional electronic storage capacity on a shared METRO Digital Resources server housed at METRO. (5) Participate in emerging statewide electronic shared access services, such as NOVEL, by representing the needs of METRO members to appropriate statewide bodies.

Intended Results: Provide improved, cost efficient access to a greater number of electronic resources. Demonstrate the benefits of sharing costs among METRO members. Help METRO members become information providers of relevant locally created information and avoid some of the costs of local digitized storage. Help METRO members benefit from any appropriate state funded resources.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Utilizing the outcomes of the study identified in Goal 1, Year 4, negotiate for and/or otherwise acquire additional electronic resources, with an emphasis on multimedia. (2) Participate in emerging statewide electronic shared access services, such as NOVEL, by representing the needs of METRO members to appropriate statewide bodies.

Intended Results: Provide improved, cost efficient access to a greater number of electronic resources. Help METRO libraries move to robust broadband access and delivery modes capable of handling not only text, but audio and video as well. Help METRO members benefit from any appropriate state funded resources.

GOAL 3: Evaluate the effectiveness and cost efficiencies of METRO's Document Delivery Service in light of the increasing availability of electronic full text information.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Collect, analyze and study courier usage statistics to identify ways to move to less frequent user libraries to user-initiated, on-call delivery. (2) Investigate a means to provide real time tracking of document delivery packets. Set up a METRO member task force to develop a profile of the materials delivered by members libraries that use the Document Delivery Service to assess the feasibility of substituting electronic delivery for some the existing traditional delivery business.

Intended Results: Gain a better understanding of the nature of materials delivered by the service and patterns of use. Control the ongoing cost of subsidizing physical delivery of materials for METRO libraries, potentially freeing resources for additional electronic full text.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Continue to study the means to control rising costs of delivery, especially methods used in comparable organizations in large metropolitan areas. (2) Consider the option of providing value-added delivery services, if that proved to offset growth in costs of the service.

Intended Results: Encourage more METRO member libraries to use on-call delivery, and require all new members to use on-call delivery. Stabilize the cost of subsidizing ILL delivery for METRO libraries, freeing money for additional electronic sources, and/or other member services.

Year 3 (July 1, 2003–June 30, 2004)

Activities: Promote the linking of METRO's own Document Delivery Service with other regional or local delivery services to extend its reach, including the linking of members systems to external libraries via appropriate peer-to-peer software.

Intended Results: Extend the benefits of courier delivery for METRO members to include transfer of materials to members from beyond the local area. Enhance automated system links to facilitate resource sharing.

Year 4 (July 1, 2004–June 30, 2005)

Activities: Promote the linking of METRO's own Document Delivery Service with other regional or local delivery services to extend its reach, including the linking of members systems to external libraries via appropriate peer-to-peer software.

Intended Results: Extend the benefits of courier delivery for METRO members to include transfer of materials to members from beyond the local area. Enhance automated system links to facilitate resource sharing.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Promote the linking of METRO's own Document Delivery Service with other regional or local delivery services to extend its reach, including the linking of members systems to external libraries via appropriate peer-to-peer software. Determine the cost-per-delivered-item and the satisfaction of METRO Document Delivery users. Compare costs and services available from other providers.

Intended Results: Ensure continued and ongoing evaluation of METRO Document Delivery Services while seeking to maintain cost effective services. Enhance automated system links to facilitate resource sharing.

GOAL 4: Assist and support METRO member libraries to streamline local library ILL operations and make them more cost efficient.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Educate and inform METRO members about emerging ILL standards in the area of peer-to-peer activity. (2) Compile and distribute electronically or via other means, relevant local METRO member ILL policies. (3) Assist members to purchase and install appropriate peer-to-peer software (ISO 1060/1061 compliant) by researching available ILL systems, demonstrating vendor options, assembling an archive of promotional and features-oriented material, and conducting phone interviews with current users.

Intended Results: Raise the understanding of METRO member ILL staff and other staff of the trend toward peer-to-peer and user-initiated ILL. Provide appropriate information and education on emerging ILL standards. Rationalize ILL policies to the extent feasible.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Sponsor a METRO conference on emerging ILL standards, policies, and technologies. (2) Evaluate and offer access to patron authentication software. (3) Establish funding alternatives, prepare RFP and purchase METRO ILL software to facilitate ILL peer-to-peer transactions, particularly to help members manage licensing records, fees, and copyright information.

Intended Results: Raise the understanding of METRO member ILL staff and other staff of the trend toward peer-to-peer and user-initiated ILL. Provide appropriate information and education on emerging ILL standards. Rationalize ILL policies to the extent feasible through installation of software to facilitate handling of METRO member ILL transactions.

Year 3 (July 1, 2003–June 30, 2004)

Activities: Investigate the feasibility of system-wide adoption of patron-initiated ILL.

Intended Results: Evaluate, system wide, the benefits and costs of sharing more resources in an unmediated fashion across the membership. Rationalize ILL policies to the extent feasible.

Year 4 (July 1, 2004–June 30, 2005)

Activities: Identify options and assist interested members to implement patron-initiated ILL.

Intended Results: Users in member libraries can enjoy the benefits and potentially lower costs of sharing more resources in an unmediated fashion across the membership. Rationalize ILL policies to the extent feasible.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Link METRO member libraries to emerging national, regional and/or statewide distributed resource sharing systems.

Intended Results: Strengthen the size and scope of the collections of print and electronic materials available to users of METRO libraries, while making the rich resources of the METRO region more widely available outside the region.

## **II. Technology Services for Member Libraries and Library System** (e.g. Regional/Virtual/Union Catalog)

GOAL 1: Work with vendors and partner with members to promote cost effective consulting and support services for information technology by brokering, consulting, and supporting member technology needs.

Year 1 (July 1, 2001–June 30, 2002)



Activities: (1) Obtain a low-cost contract with one vendor for toll-free hardware support paid for by the members. (2) Sponsor and promote at least two technology vendor show cases each year to inform members about emerging technology options.

Intended Results: Assist members to find cost effective technology support that will supplement their local resources. Better inform members about the features and benefits of new technologies.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Determine, via a web survey, or other means, the most commonly sought software support among members. (2) Obtain a contract with one additional vendor to provide toll-free support or obtain one commonly used software package. (2) Sponsor and promote at least two technology vendor showcases each year to inform members about emerging technology options.

Intended Results: Assist members to find cost effective technology support. Better inform members about the features and benefits of new technologies.

Year 3 (July 1, 2003–June 30, 2004)

Activities: Obtain a contract with one additional vendor to provide toll-free support for one commonly used software package. Investigate the options for providing contracted live online customer technical support over the Internet for common hardware and software in use at METRO libraries.

Intended Results: Assist members to find cost effective technology support and thereby improve staff effectiveness and library user satisfaction.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Add a METRO technology consultant or contract employee for full time telephone and on-site consultation for smaller member libraries (value added service). (2) Obtain cost effective contracts at favorable rates to cover technical support for the most-used software and hardware packages among members.

Intended Results: Assist members to find cost effective technology support. Provide additional support, on a cost recovery basis, for smaller libraries who lack adequate technology support.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Add online live technology support services for members through the METRO web site.

Intended Results: Assist members to find cost effective technology support in order to control the increase in cost for this need at the local library level.

GOAL 2: Facilitate the access of each member to other members' resources through implementation of the Z39.50 standard and other technologies.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Educate and mentor members about the benefits and availability of Z39.50 software. (2) Offer competitive grants to support the purchase of the software.

Intended Results: Improve accessibility and interoperability of all METRO member resources.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Award additional grants for Z39.50 implementation with the goal of encouraging implementation by all METRO members by the end of the five year period. (2) Establish funding alternatives, prepare RFP, and purchase METRO ILL software to facilitate ILL.

Intended Results: Improve accessibility and interoperability of all METRO member resources.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Implement a consolidated portal for one-stop "shopping" and to serve as a gateway to all METRO electronic resources. (2) Investigate the feasibility of system wide adoption of patron-initiated ILL.

Intended Results: Improve accessibility and interoperability of all METRO member resources. Simplify the information access environment for library users and METRO members.

Year 4 (July 1, 2004–June 30, 2005)

Activities: Help members to integrate the implementation of Z39.50 with the implementation of member peer-to-peer options and user initiated sharing software in order to ensure smooth interoperability and articulation between and among METRO member automated systems, which describe and link resources, as well as between members and METRO servers and external resources servers.

Intended Results: Improve accessibility and interoperability of all METRO member resources.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Monitor emerging interoperability standards, changes in existing standards, and provide advice and consultation to members on these changes. (2) Evaluate the implementation of ISO ILL standards among METRO members who have integrated them.

Intended Results: Improve accessibility and interoperability of all METRO member resources. Provide a better understanding of how the use of standards can affect the availability of, and access to, shared member resources.

### III. Identify Special Client Group Needs & the Means for Meeting Them (Hospital Library Services, Other(s))

GOAL 1: Facilitate the efforts of staff of hospital libraries to effectively market and position their services in the emerging managed care environment.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Develop a customized newsletter service for HLSP members, which will assist them to promote their services and educate users about new information resources without having to devote significant local library staff resources to the effort. (2) Develop and produce, on behalf of members, a series of targeted marketing mailers or other promotional items, such as posters or PowerPoint presentations, that can be locally customized in the following areas of high HLSP staff interest: patient education, CME, accreditation processes, nursing information, grant seeking skills, support staff issues, and consumer health (from HLSP survey).

Intended Results: Directly address needs identified by the HLSP participants through HLSP survey, site visits, and focus group. Target specific services to those topics and areas of greatest interest to HLSP members.

Year 2 (July 1, 2002–June 30, 2003)

Activities: Using METRO staff assets as well as contract services, assist libraries to raise the quality of their marketing materials by developing a standard “look and feel” for print as well as electronic promotional items.

Intended Results: Raise the quality of local HLSP member library marketing and promotional products.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Provide access to marketing expertise through METRO contracts with graphic artists and/or other marketing specialists. (2) Assist HLSP members to establish closer client relationships through the creation of client profiles and databases.

Intended Results: Raise the quality of local HLSP member library marketing and promotional products.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Create a cooperative HLSP marketing program that can extend across all HLSP members with a standard set of marketing goals and promotional materials. (2) Provide an online archive and clearinghouse for members to share their locally produced marketing materials, reports and library products. (3) Make the marketing resource archive available via the METRO web portal.

Intended Results: Raise the quality of local HLSP member library marketing and promotional products.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Conduct a study of hospital library marketing programs among comparable systems to identify improvements and establish standards for METRO HLSP marketing materials.

Intended Results: Raise the quality of local HLSP member library marketing and promotional products.

GOAL STATEMENT 2. Directly support the specific educational and staff development needs of the small hospital or health services library staff.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Enrich and customize continuing education offerings applicable to HSLP and market these services aggressively to reach the intended audience. (2) Find ways to distribute educational offerings into the field. (Almost 25% of HLSP respondents report having an in-library computer lab.)

Intended Results: The maximum audience will utilize CE courses. Training will enrich the course attendees.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Identify, develop locally, or outsource CE programming for HLSP libraries that will directly target their needs in these areas: popular biomedical information resources, including PubMed, GratefulMed, Harrison's, Aidsline, CINAHL, and CancerLit. (2) Speed the offering of an enriched, health science focused PD curriculum through use of pre-existing training available from local health science libraries or other organizations, such as NYAM or MLA sanctioned training. (3) Ensure that METRO CE courses directed at the Health Science Community carry continuing education credits. (4) Develop at least one innovatively delivered CE program for HLSP members using web software, video conferencing, or other means

Intended Results: PD courses will be effectively utilized by the maximum audience and the training will enrich the course attendees. Use existing METRO conferencing capability more effectively.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Develop at least one professional quality CME course focused on effective use of biomedical information, using METRO staff assets, contract services, and/or local member library resources. (2) In coordination with other METRO PD activities, investigate best practices among other CE providers that make PD programs accessible and available to small, especially one-person libraries. (3) Develop at least one innovatively delivered CE program for HLSP members using web software, video conferencing, or other means

Intended Results: CE courses will be effectively utilized by the maximum audience and the training will enrich the course attendees. Help small libraries become CME providers for their health service professional community. Use existing METRO conferencing capability more effectively.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Add at least one additional professional quality CME course focused on effective use of biomedical information, directed toward health care providers served by HLSP member, using METRO staff assets, contract services, and/or local member library resources. (2) Develop at least one innovatively delivered CE program for HLSP members using web software, video conferencing, or other means.

Intended Results: CE courses will be effectively utilized by the maximum audience and the training will enrich the course attendees help small libraries become CME providers for their health service professional community. Use existing METRO conferencing capability more effectively.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Evaluate the success of METRO produced CME courses focused on effective use of biomedical information, using METRO staff assets, contract services, and/or local member library resources.

Intended Results: CE courses will be effectively utilized by the maximum audience and the training will enrich the course attendees. Feedback and evaluation of METRO efforts will result in renewal of courses and services among members.

GOAL 3. Extend the effectiveness of HLSP library staff by performing some functions at METRO that can be shared by all HLSP participants.

Year 1 (July 1, 2001–June 30, 2002)

Activities: Create and make available standard, shared templates for common HLSP library member needs, including marketing materials and accreditation reports.

Intended Results: Share the cost of producing standard work products.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Evaluate the usefulness of standard shared templates for common HLSP library member needs, including marketing materials and accreditation reports, and modify or update as needed. (2) Investigate the availability of

Application Service Providers with online tools and resources of interest to HLSP members. (3) Contract for a shared roving medical library professional to staff HLSP member local libraries when staff need relief to attend CE classes or for other activities.

Intended Results: Share the cost of producing standard work products. Shift daily routine operations such as word processing, report generation, etc., to online shared service providers. Reduce the impact of lack of staff.

Year 3 (July 1, 2003–June 30, 2004)

Continue activities as outlined in Year 1 and 2 with same intended results.

Year 4 (July 1, 2004–June 30, 2005)

Continue activities as outlined in Year 1 and 2 with same intended results.

Year 5 (July 1, 2005–June 30, 2006)

Continue activities as outlined in Year 1 and 2 with same intended results.

GOAL 4: Facilitate and assist smaller METRO HLSP libraries to complete the automation of their catalogs and other services.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Work with HLSP libraries to utilize technology grants to identify, purchase and install hardware and software for automating library catalogs (or contract for these services from a vendor providing these applications on the Web.) (2) Negotiate a fixed-price retrospective conversion price with a vendor to facilitate the conversion of remaining hospital library collections, once they have been weeded. (3) Help HLSP libraries that are affiliated with larger libraries to gain access to automation from the partner library where feasible.

Intended Results: METRO hospital libraries that have been unable to complete their transition to an automated system will be able to complete that step.

Year 2 (July 1, 2002–June 30, 2003)

Activities: Continue activities as outlined in Year 1 and extend the services to additional HLSP members. (2) Work with HLSP libraries to expand their use of automated library systems to include serials control, circulation, acquisitions and any other modules as appropriate. (3) Assist HLSP members to acquire and implement software, including Z39.50 and related packages, that will increase their ability to interoperate with other METRO members and external libraries.

Intended Results: METRO hospital libraries that have been unable to complete their transition to an automated system will be able to complete that step. HLSP library users will enjoy enhanced functionality and access to resources.

Year 3 (July 1, 2003–June 30, 2004)

Activities: Continue activities as outlined in Years 1 and 2, and extend the services to additional HLSP members.

Intended Results: METRO hospital libraries that have been unable to complete their transition to an automated system will be able to complete that step. HLSP library users will enjoy enhanced functionality and access to resources.

Year 4 (July 1, 2004–June 30, 2005)

Activities: Continue activities as outlined in Years 1, 2, and 3 and extend the services to additional HLSP members.

Intended Results: METRO hospital libraries that have been unable to complete their transition to an automated system will be able to complete that step. HLSP library users will enjoy enhanced functionality and access to resources.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Continue activities as outlined in Years 1-4 and extend the services to any remaining HLSP members that have not benefited, so that at the end of Year 5 all HLSP member libraries will be automated. (2) Conduct an evaluation of the activities undertaken to assist HLSP small members to automate.

Intended Results: METRO hospital libraries that have been unable to complete their transition to an automated system will be able to complete that step. HLSP library users will enjoy enhanced functionality and access to resources. METRO will be able to describe the success of this 5 year automation effort.

#### IV. Professional Development

GOAL 1: Assess METRO member needs for professional development (PD) on an ongoing and continuous basis.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Assess feasibility of alternative technologies for delivery of METRO PD programs that take advantage of newly emerging media. (2) Determine the most commonly used online software for distance education in use among METRO libraries and other libraries in the state. (3) Build on and enhance METRO PD courses through ongoing evaluation.

tion, targeted personalized marketing and coordinated courses offered in series. (4) Create a database of METRO CE customers and trainers that includes information about their preferences, requests, evaluations, CEU's, and course histories. (See also related work in Section 6, Goal 1) (5) Continually seek PD customer feedback on course topics and promptly develop courses as needs become evident. (6) Use METRO web site survey capability to test course ideas with members.

**Intended Results:** The maximum audience will effectively utilize PD courses and the training will enrich course attendees, help librarians and other library staff gain new skills and knowledge and ultimately enhance services to end users. Gain better knowledge of METRO's PD customers.

**Year 2 (July 1, 2002–June 30, 2003)**

**Activities:** (1) Using the METRO PD customer/trainer database, begin to interact with existing customers by providing more specific and targeted course information and reminders. (2) Develop strong relationships with the METRO faculty of trainers, assist them to enhance and update their courses and courseware by providing direct feedback and support. (3) Develop the METRO online course registration and payment module and integrate it with a redesigned METRO web presence. (4) Create a METRO online Newsletter or announcement of CE offerings that is targeted to existing and new PD customers. (5) In cooperation with other similar PD providers such as NYLINK and METRO's own large members, determine the feasibility of developing a certification system for some of METRO's courses, particularly those directed to support staff.

**Intended Results:** PD courses will be effectively utilized by the maximum audience and the training will enrich the course attendees. METRO staff will be able to automate and streamline routine course management activities. METRO courses will continuously be improved and updated.

**Year 3 (July 1, 2003–June 30, 2004)**

**Activities:** (1) Conduct a comprehensive assessment of support staff PD needs. (2) Identify trainers who can specifically address the needs of library support staff. (3) Link PD course registration and payment directly to METRO accounting services software. (4) Building on the feasibility study of certification in Year 2, test market a certification option for support staff.

**Intended Results:** PD courses will be effectively utilized by the maximum audience, and the training will enrich the course attendees. Member needs for efficient registration and payment for courses will be met. METRO courses will continuously be improved and updated, and extended to, support and ancillary staff in libraries. METRO branded courses can have recognition based on a certification that trainees have gained specific identifiable skills and knowledge.

**Year 4 (July 1, 2004–June 30, 2005)**

**Activities:** Continue ongoing assessment strategies and integrate findings into new course options, delivery methods, choice of trainers, and scheduling. Partnering with large members and other providers as appropriate, roll out a METRO certification option for support staff and/or technical staff.

**Intended Results:** PD courses will be effectively utilized by the maximum audience and the training will enrich the course attendees. METRO branded courses can have recognition based on a certification that trainees have gained specific identifiable skills and knowledge.

**Year 5 (July 1, 2005–June 30, 2006)**

**Activities:** Continue ongoing assessment strategies and integrate findings into new course options, delivery methods, choice of trainers, and scheduling.

**Intended Results:** PD courses will be effectively utilized by the maximum audience and the training will enrich the course attendees.

**GOAL 2:** Through videoconferences, web-based methods or other means, offer distance education opportunities to professional and non-professional staff of library and information service organizations.

**Year 1 (July 1, 2001–June 30, 2002)**

**Activities:** (1) Offer at least one online-based course by the end of Year 1, utilizing leased software or other cost effective means. (2) Offer at least 2 video conference training or other PD opportunities using existing video conferencing capabilities at METRO. (3) Identify and establish relationships with experienced qualified trainers who have already created or can create METRO branded courseware for use as online or video courses. (4) Identify the leading training providers in the library and information community and adapt or install their methods where appropriate to speed up METRO PD development and improve quality. (5) Cross brand courses or workshops with a selected set of partners, including



NYLINK and other library consortia whose interests match METRO's needs.

**Intended Results:** Enable individuals to benefit from educational presentations from anyplace, anytime, and at their own pace whenever possible or appropriate. Make maximum use of METRO's in place video conference capability and link to member libraries with similar equipment to expand audiences. Benefit from the prior experience and existing knowledge of other PD providers to save time and money in developing METRO offerings. METRO members can benefit from high quality courses developed elsewhere without having to travel.

**Year 2 (July 1, 2002–June 30, 2003)**

**Activities:** (1) Offer at least one online-based series of courses, directed either at a specific target audience or covering a topical area, by the end of year 2. (2) Offer an ongoing calendar of videoconference training, or other PD opportunities using existing video conferencing capabilities at METRO, either developed in house or secured from external providers.

**Intended Results:** Enable individuals to benefit from educational presentations from anyplace, anytime, and at their own pace whenever possible or appropriate. Make maximum use of METRO's in place video conference capability and link to member libraries with similar equipment to expand audiences.

**Year 3 (July 1, 2003–June 30, 2004)**

**Activities:** (1) Offer a comprehensive set of courses through online means by the end of year. (2) Broker the offerings of other library and information related courseware of interest to member libraries. (3) Offer a comprehensive catalog of video conference training intended to address the needs of a wide variety of librarians and library staff in the metropolitan area.

**Intended Results:** Enable individuals to benefit from educational presentations from anyplace, anytime, and at their own pace whenever possible or appropriate. Make maximum use of METRO's in place video conference capability, and link to member libraries with similar equipment to expand audiences. METRO will build on existing strengths in PD delivery emerging as a respected state-wide provider of a high quality, well organized training catalog for the library community, utilizing a variety of delivery modes.

**Year 4 (July 1, 2004–June 30, 2005)**

**Activities:** (1) Offer METRO member libraries the option of mounting locally developed courses on METRO servers, either for local use at the participating libraries or for use by all METRO members. (2) Hire a distance education specialist or contract for expert services to provide assistance and support to METRO librarians who wish to develop courseware for distribution through METRO.

**Intended Results:** Enable individuals to benefit from educational presentations from anyplace, anytime, and at their own pace whenever possible or appropriate. Make maximum use of METRO's in place video conference capability, and link to member libraries with similar equipment to expand audiences. METRO will build on existing strengths in PD delivery, emerging as a respected state wide provider of a high quality, well organized training catalog for the library community, utilizing a variety of delivery modes. METRO will significantly enhance the ability of local libraries to deliver training by providing services they need to develop the training, by partnering with libraries in development of training, and by promoting library developed training on behalf of member libraries.

**Year 5 (July 1, 2005–June 30, 2006)**

**Activities:** Using METRO staff and member assets, create an online catalog of tested METRO PD courses that can be offered globally to the library and information community on a fee-basis.

**Intended Results:** Enable individuals to benefit from educational presentations from anyplace, anytime, and at their own pace whenever possible or appropriate. METRO will build on existing strengths in PD delivery emerging as a respected national provider of a high quality, well organized training catalog for the library community, utilizing a variety of delivery modes. METRO will significantly enhance the ability of local libraries to delivery training by providing services they need to develop the training, by partnering with libraries in development of training, and by promoting library developed training on behalf of member libraries.

**GOAL 3: Facilitate technology education among METRO members.**

**Year 1 (July 1, 2001–June 30, 2002)**

**Activities:** In classroom offerings, educate, inform and demonstrate authentication software, customization software, multilingual software, digitization, and workflow (including vendor exhibits).

Intended Results: Assist members to learn about, test, and evaluate emerging technology appropriate to their libraries.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Use web-based surveys to determine interest in repeating the offerings of Year 1 or in conducting similar offerings with advanced or new topics. (2) Offer the technology related courses identified in Year 1 via programming on the web and/or video. (3) Partner with other New York PD providers to bring high quality technology programming to the METRO area in the most cost effective manner possible by sharing program development and course presentation costs.

Intended Results: Assist members to learn about, test, and evaluate emerging technology appropriate to their libraries. Expand technology training to include distance education methods of delivery.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Repeat activities of Year 2. Use web-based surveys to determine interest in repeating the offerings of Year 1 or 2, or in conducting similar offerings with advanced or new topics. (2) Increase sophistication of web offerings. (3) Determine the feasibility of offering video training on the web in addition to METRO's existing video conferencing delivery system. (4) Increase the offerings in technology related continuing education to specifically target library support staff.

Intended Results: Assist members to learn about, test, and evaluate emerging technology appropriate to their libraries. Members will have easier access technology training through desktop Web delivery of courses.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Repeat activities of Year 1-3 (2.) Use Web-based surveys to determine interest in repeating the offerings of Year 1-3 or in conducting similar offerings with advanced or new topics and offer the programs on the web. (3) Upgrade the training lab at METRO by evaluating needs for new and/or additional computer and related resources, giving attention to the need for high speed data capability to deliver audio and video to the desktop. (4) Compare METRO PD technology courses to courseware available from competing or allied organizations, adapting best practices and/or innovative delivery ideas.

Intended Results: Assist members to learn about, test and evaluate emerging technology appropriate to their libraries. Members will have easier access technology training through desktop Web delivery of courses. The best practices of other technology training providers will be available at METRO.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Identify and contract with METRO member libraries to provide additional remote training sites equipped with appropriate hardware and software to expand the locations in which METRO can offer technology related training in a classroom facilitated session.

Intended Results: Assist members to learn about, test, and evaluate emerging technology appropriate to their libraries. Members will have easier access technology training through access to METRO classrooms, remote classrooms, video, and Web based delivery.

GOAL 4: Assist METRO staff and staff of member libraries to improve their strategic marketing and product development skills.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Develop the marketing knowledge and skills of METRO system staff members at all levels through targeted educational activities and conference attendance. (2) Offer to METRO library staff a set of specifically focused continuing education programs targeted to assist them to identify, profile, and serve locally important market segments, especially HLSP members and other smaller libraries. (3) Transfer the knowledge of METRO staff about customer database development and customer focused services to the library membership.

Intended Results: Build on the knowledge of METRO staff members to assist library staff members to become more customer focused. Members will build new and improved marketing skills to remain competitive, vital information providers.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Continue to develop and improve the marketing knowledge and skills of METRO system staff members at all levels through targeted educational activities and conference attendance. (2) Offer METRO library staff specifically focused continuing education programs targeted to assist them to identify, profile, and serve locally important market segments, especially HLSP members and other smaller libraries. (3) Through PD or by other means, help METRO members begin to develop customer databases to improve their marketing and outreach capability.

Intended Results: Build on the knowledge of METRO staff members to assist library staff members to become more customer focused. Members will build new and improved marketing skills to remain competitive, vital information providers.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Continue to develop and improve the marketing knowledge and skills of METRO system staff members at all levels through targeted educational activities and conference attendance. (2) Using METRO's own knowledge and experience with the METRO customer database, introduce the concept of customer relationship management to METRO libraries and advise libraries on appropriate software packages to build customer databases locally.

Intended Results: Build on the knowledge of METRO staff members to assist library staff members to become more customer focused. Members will build new and improved marketing skills to remain competitive, vital information providers.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Offer a workshop or conference on the ethics of library marketing, including the issues of privacy and security of patron data. (2) Continue to develop METRO in-house skill with customer relationship management and share that skill with member libraries through training and workshops.

Intended Results: Build on the knowledge of METRO staff members to assist library staff members to become more customer focused. METRO member libraries will be better able to utilize customer data appropriately to enhance service, while respecting traditional library values of privacy and security of customer data.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Continue to develop METRO's in-house skill with customer relationship management and share that skill with member libraries through training and workshops. (2) Evaluate the outcomes of METRO's increased emphasis on customer focused marketing techniques.

Intended Results: Build on the knowledge of METRO staff members to assist library staff members to become more customer focused. METRO member libraries will be better able to utilize customer data appropriately to enhance service, while respecting traditional library values of privacy and security of customer data. METRO will be recognized as a model in the area of customer focused marketing.

## V. Awareness and Advocacy

GOAL 1: Enhance the capabilities of METRO member library staff to effectively promote and advocate for library services.

Year 1 (July 1, 2001–June 30, 2002)

Activities: Develop a range of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

Intended Results: Librarians improve their strategic position, advocate for, and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 2 (July 1, 2002–June 30, 2003)

Activities: Develop a range of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 3 (July 1, 2003–June 30, 2004)

Activities: Develop a range of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement

Year 4 (July 1, 2004–June 30, 2005)

Activities: Develop a range of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 5 (July 1, 2005–June 30, 2006)

Activities: Develop a range of PD courses and presentations that educate members about effective means to position and promote library services within their community, school district, university, company or agency.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

GOAL 2: Advocate for libraries and library systems in the METRO region, cooperating with other local professional organizations, and addressing the concerns of METRO libraries to appropriate state and local legislators and other officials.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Promote and encourage participation in Legislative Day. Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Promote and encourage participation in Legislative Day. Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Promote and encourage participation in Legislative Day. Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Promote and encourage participation in Legislative Day. Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Promote and encourage participation in Legislative Day. Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives.

Intended Results: Librarians improve their strategic position, advocate for and gain increased support and gain concrete

recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

**GOAL 3:** Advocate on behalf of METRO area libraries and library systems at the Federal level, seeking continued and increased support of libraries and informing legislators of the effects on libraries of other pending legislation, including changes in intellectual property law.

**Year 1 (July 1, 2001–June 30, 2002)**

**Activities:** (1) Promote and encourage participation in Legislative Day. (2) Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives. (3) Collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

**Intended Results:** Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

**Year 2 (July 1, 2002–June 30, 2003)**

**Activities:** (1) Promote and encourage participation in Legislative Day. (2) Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives. (3) Collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

**Intended Results:** Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

**Year 3 (July 1, 2003–June 30, 2004)**

**Activities:** (1) Promote and encourage participation in Legislative Day. (2) Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives. (3) Collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

**Intended Results:** Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

**Year 4 (July 1, 2004–June 30, 2005)**

**Activities:** (1) Promote and encourage participation in Legislative Day. (2) Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives. (3) Collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

**Intended Results:** Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

**Year 5 (July 1, 2005–June 30, 2006)**

**Activities:** (1) Promote and encourage participation in Legislative Day. (2) Sponsor and support educational activities that inform librarians about how to link library advocacy to important state issues and initiatives. (3) Collaborate actively with other library systems, with state administrators and professional groups to leverage the power of libraries at the federal level.

**Intended Results:** Librarians improve their strategic position, advocate for and gain increased support and gain concrete recognition of the contributions their libraries make to education, economic development, culture, and civic involvement.

## **VI. Communication Among Member Libraries**

**GOAL 1:** Improve member communication in order to promote and encourage effective use of all member information resources, services, and expertise.

**Year 1 (July 1, 2001–June 30, 2002)**

**Activities:** (1) Create a METRO electronic community environment with the initial step of moving the METRO Member Directory to the Web in order to make it more accessible, enrich the information it contains, and ensure its currency. (2)



Create an in-house database of METRO customers (individuals within member libraries, vendors, friends and partners of METRO, and other METRO stakeholders) that includes information about their preferences, requests, services utilized, etc.) (See also Section 5, Part IV, Goal 1–METRO PD Customer/Trainer Database)

**Intended Results:** Provide fast, reliable, up-to-date access to resource sharing information to all staff in METRO member libraries. Improve the ability of METRO staff to gather, analyze and use customer and stakeholder information for the purpose of enhancing services and controlling administrative costs.

**Year 2 (July 1, 2002–June 30, 2003)**

**Activities:** (1) Add additional data to the METRO Member Directory on the Web in order to make it more accessible, enrich the information it contains, and ensure its currency. (2) Focus on the inclusion of information about staff in METRO member libraries with details of their background, experience, and expertise so that METRO resource sharing can extend to human expertise. (3) Investigate the feasibility and applicability of a METRO sponsored 24/7 reference service with round the clock access to qualified METRO reference librarians. (4) Build additional skill in developing the in-house METRO customer database, integrating information about PD users and other METRO customers.

**Intended Results:** Provide fast, reliable, up-to-date access to resource sharing information to all staff in METRO member libraries. Improve the ability of METRO staff to gather, analyze and use customer and stakeholder information for the purpose of enhancing services and controlling administrative costs

**Year 3 (July 1, 2003–June 30, 2004)**

**Activities:** (1) Provide members with the capability to update their own library and individual directory entries. (2) Redesign and deploy the METRO Web site with a focus on easier access to catalogs of members, utilizing standards such as Z39.50. (3) Provide member library staff with the ability to customize their own Web interface page in order to facilitate their use of METRO information and communication tools, including the online directory, catalogs, and member list-servs. (3) Set up a METRO 24/7 shared reference function, modeled on successful services in place elsewhere. (4) Integrate the METRO customer database with METRO accounting functions in order to streamline member account inquiry, registration, payment of fees, and other financial services.

**Intended Results:** Provide fast, reliable, up-to-date access to resource sharing information to all staff in METRO member libraries. Move METRO member library communication to the Web in order to speed it up, provide access to a wider range of member services and resources, and contain costs associated with print directories. Provide a seamless administrative and financial interface for METRO member libraries.

**Year 4 (July 1, 2004–June 30, 2005)**

**Activities:** (1) Link METRO's own online community (e-directory of members) to appropriate regional, national and international expertise directories. (2) Create an online METRO job resource on METRO's Web site to facilitate member recruiting and to assist METRO member staff in finding new career opportunities. (3) Link METRO's 24/7 reference service to related emerging library services across the country

**Intended Results:** Facilitate the exchange of information about job opportunities and candidates among all METRO members. Provide fast, reliable, up-to-date access to resource sharing information to all staff in METRO member libraries. Move METRO member library communication to the web in order to speed it up, provide access to a wider range of member services and resources, and contain costs associated with print directories. Enhance the delivery of high quality reference services around the clock.

**Year 5 (July 1, 2005–June 30, 2006)**

**Activities:** (1) Continue the development of the METRO Member Electronic community (database, 24/7 reference, etc). (2) Evaluate the use of the online directory and other shared knowledge resources. (3) Market customized METRO tools for the management of customer information in a library environment based on the systematic development of a METRO in house customer database as well as a member online directory.

**Intended Results:** Provide fast, reliable, up-to-date access to resource sharing information to all staff in METRO member libraries. Enhance the delivery of high quality reference services around the clock. Monetize the knowledge gained in developing customer database management skills.

## **VII. Cooperative Efforts With Other Library Systems**

GOAL 1: Support and complement, rather than duplicate, the services and programs of other systems that serve METRO members, while developing unique services for METRO members that can be offered to other libraries outside of METRO as models.

Year 1 (July 1, 2001–June 30, 2002)

Activities: (1) Inventory collaboratively licensed or acquired information resources among METRO member libraries in order to identify the various aggregators and systems with whom METRO should cooperate more closely. (2) Continue to cooperate with NYLINK to co-brand appropriate PD workshops, sharing knowledge, expertise, and costs. (3) Participate in statewide efforts to create a state electronic virtual library by participating in appropriate meetings and on task forces. (4) Continue active participation in relevant state and regional consortia including the 3Rs Council, and other New York state groups.

Intended Results: Ensure broad knowledge of the overlapping opportunities available to METRO members and avoid the unnecessary duplication of effort.

Year 2 (July 1, 2002–June 30, 2003)

Activities: (1) Maintain and update a database for use by METRO members containing inventoried information about cooperatively purchased resources available in the METRO region. (2) Collaborate strongly with other systems, especially the other 3Rs, WALDO and public library systems, as well as the local New York university and college systems to identify and take advantage of economies of scale on behalf of METRO members. (3) Using the METRO Web site as the vehicle, make an easy-to-use link to other systems from the METRO Web site, especially featuring those with whom METRO has existing relationships and shared services.

Intended Results: Ensure broad knowledge of the overlapping opportunities available to METRO members and avoid the unnecessary duplication of effort.

Year 3 (July 1, 2003–June 30, 2004)

Activities: (1) Participate in relevant 3Rs cooperative efforts to extend and expand resource sharing services beyond METRO. (2) Collaborate with other similar large metropolitan regional systems in other parts of the country in order to benefit from their knowledge and programming experience.

Intended Results: Ensure broad knowledge of the overlapping opportunities available to METRO members and avoid the unnecessary duplication of effort. Take advantage of the knowledge of similar organizations with programs or services that may benefit METRO libraries.

Year 4 (July 1, 2004–June 30, 2005)

Activities: (1) Participate in relevant 3Rs cooperative efforts to extend and expand resource sharing services beyond METRO. (2) Collaborate with other similar, large metropolitan regional systems in other parts of the country in order to benefit from their knowledge and programming experience.

Intended Results: Ensure broad knowledge of the overlapping opportunities available to METRO members and avoid the unnecessary duplication of effort. Take advantage of the knowledge of similar organizations with programs or services that may benefit METRO libraries.

Year 5 (July 1, 2005–June 30, 2006)

Activities: (1) Participate in relevant 3Rs cooperative efforts and statewide efforts, to extend and expand resource sharing services beyond METRO. (2) Collaborate with other similar, large metropolitan regional systems in other parts of the country in order to benefit from their knowledge and programming experience.

Intended Results: Ensure broad knowledge of the overlapping opportunities available to METRO members and avoid the unnecessary duplication of effort. Take advantage of the knowledge of similar organizations with programs or services that may benefit METRO libraries.