

MARMOT LIBRARY NETWORK, INC.

STRATEGIC PLAN

2003 - 2005

**GOALS, STRATEGIC DIRECTIONS, ACTIONS AND TIMETABLES,
AND MEASURES OF SUCCESS**

**GOAL #1: MARMOT HAS A STABLE AND FUNCTIONAL INTEGRATED
LIBRARY SYSTEM (ILS)**

STRATEGIC DIRECTIONS:

1) The basic system, circulation, public access catalog, and cataloging, becomes fully functional and is stable day-to-day.

- ✓ Marmot staff work with Innovative Interfaces, Inc. (III) to eliminate bad code and correct functionality that is not working as specified.

ACTIONS AND TIMETABLES:

- *Operations and Member Services investigate system stability and reports errors to Innovative.*
 - ❖ *Ongoing*

- ✓ Marmot staff works with member libraries and committees to determine and implement needed system changes.

ACTIONS AND TIMETABLES:

- *Member Services determines needed system changes by conducting on site interviews with member library staff and through group meetings.*
- *Marmot staff reports member concerns to Member Services when on site and via Help Desk calls and e-mails.*
- *Requested system changes are shared at the weekly Troubleshooting meetings.*
 - ❖ *Ongoing. A Marmot staff member contacts each member at least quarterly.*
 - ❖ *Resolved to date: Holds, Acquisitions, Z39.50.*

2) The basic system is improved with new functionality.

- ✓ All functional modules purchased are fully implemented

ACTIONS AND TIMETABLES:

- *E-mail notification is investigated, tested and users are trained to use it.*
 - ❖ *Complete first quarter 2003.*
- *Patron self-renewal is investigated, tested and functionality is "turned on" for members.*
 - ❖ *Complete second quarter 2003.*
- *My Millennium and Featured Lists functionality is implemented.*
 - ❖ *Complete third quarter 2003.*
- *Web Access Management (WAM) is partially implemented. Development staff to work with III and data base vendors to complete full functionality.*
 - ❖ *Complete fourth quarter 2003.*
- *Authority Control is investigated by the Data Base Task Force and recommendations made to the Executive Board*
 - ❖ *Complete fourth quarter 2003*
- *Table of Contents indexing and display software are investigated by the OPAC Task*

Force and recommendations made to the Executive Board

- ❖ *Complete 2004*
- ❑ *Bursar functionality is discussed by representatives of the academic and school members and recommendations made to the Executive Board*
 - ❖ *Complete 2004*
- ❑ *A task force of academic and high school member representatives will determine the usefulness of Electronic Reserves and plan the implementation of the module.*
 - ❖ *Initiate 2004 and complete 2005*

- ✓ *Members are surveyed to determine additional modules needed.*

ACTIONS AND TIMETABLES:

- ❑ *Discussions are held by member directors during the annual Council meeting to review new modules and consider their purchase.*
 - ❖ *May 2003, 2004, 2005*

- ✓ *Cost-benefit analysis is done and member agreement is reached on priorities and timetables for implementation of new modules.*

ACTIONS AND TIMETABLES:

- ❑ *Task Forces are created following the Council meetings to investigate new modules and make recommendations to the Executive Board. Development staff has primary responsibility for assisting Task Forces*
- ❑ *New modules to be purchased are announced and implementation timetables are discussed at the annual Staff Development Conference.*
 - ❖ *Task Forces formed in June 2003, 2004, 2005.*
 - ❖ *Executive Board determines new modules to be purchased in September 2003, 2004, 2005.*
 - ❖ *Staff Development Conference is held in late September or October 2003, 2004, 2005*

- ✓ *Members, through Marmot staff, request and prioritize system enhancements through the Innovative Users Group (IUG).*

ACTIONS AND TIMETABLES:

- ❑ *In conjunction with the Innovative User's Group enhancements schedule, Member Services polls members to determine enhancement requests and Marmot's votes.*
 - ❖ *Timing per IUG schedule.*

3) Data base cleanup and maintenance is implemented.

- ✓ *Duplicate bibliographic records are eliminated.*
- ✓ *Authority control is implemented and maintained.*
- ✓ *Acceptable basic cataloging practices are determined and agreed to.*
- ✓ *A cataloging standards enforcement process is implemented.*
- ✓ *Ongoing error reporting and data base cleanup occurs routinely.*

ACTIONS AND TIMETABLES:

- ❑ *Member Services, in conjunction with Innovative when required, will run reports to determine the existence of bad record codes and initiate corrective measures in-house, with members, and with Innovative.*
 - ❖ *Ongoing*

MEASURES OF SUCCESS:

- *The Integrated Library System, including all modules purchased, is stable and functions to expectations.*
- *Every member library pays for what it uses and it works.*

- The ILS is a mature and robust system.
- A timetable is established to target negotiations for the next generation ILS.

GOAL #2: MARMOT MEMBERS ARE TRAINED TO USE THE CONSORTIUM'S PRODUCTS AND SERVICES

STRATEGIC DIRECTIONS:

1) Training for use of the ILS will be:

✓ Interest based.

ACTIONS AND TIMETABLES:

- *Member Services surveys members to determine areas of interest for new or follow-up training.*
 - ❖ *Ongoing and semi-annually in January and July.*

✓ Distributed, conducted at multiple geographic regions.

ACTIONS AND TIMETABLES:

- *Investigate holding training sessions in Eagle, Montrose, and Roaring Fork (Glenwood) as potential host sites with adequate space and high speed Internet access.*
- *Acquire laptop computers for a mobile training lab.*
 - ❖ *Determine regional host sites during 2003.*
 - ❖ *Institute regional training during 2004*

✓ Designed to "train the trainer".

ACTIONS AND TIMETABLES:

- *Assess appropriateness of training in the "train the trainer" model by Operations, Member Services and Development.*
 - ❖ *Begin such training during 2003 on a case-by-case basis.*

✓ Ongoing, particularly at the annual support staff workshop.

ACTIONS AND TIMETABLES:

- *Members are recruited to plan the Staff Development Conference.*
 - ❖ *Establish the date and location annually in February.*
 - ❖ *Planning meetings begin in May annually.*

✓ Cost-based for additional on-site training.

ACTIONS AND TIMETABLES:

- *Training beyond Millennium will be made available to members at the rates for Extended Technical Support in the Price Schedule, if Marmot staff has the expertise to provide the training needed.*
- *Marmot will arrange for outside trainers for other technology-related topics as needed.*
 - ❖ *Ongoing as needed.*

✓ Given at times mutually agreeable to the member library and Marmot trainer.

2) Marmot staff is trained at vendor headquarters, by vendor trainers at Marmot offices or member sites, and by attendance at IUG and RMRIUG meetings and conference programs, as appropriate.

ACTIONS AND TIMETABLES:

- *Appropriate Marmot staff will attend Consortium Partners meetings at Innovative Headquarters.*
 - ❖ *Every eighteen months.*

- ❑ *Members Services Manager will determine the best use and schedule remaining Innovative training days.*
 - ❖ *Third quarter 2003.*
- ❑ *Library System Administrator will attend Innovative load table training.*
 - ❖ *2004.*
- ❑ *Selected Marmot staff will attend all available IUG, RMIUG, and association continuing education opportunities as appropriate to their duties.*
 - ❖ *2003, 2004, 2005.*

3) Member library staff is trained by attending vendor retreats and workshops, IUG, RMRIUG, and associations conference programs, to the extent possible.

ACTIONS AND TIMETABLES:

- ❑ *Marmot will inform members of training opportunities and encourage participation. Post training materials and presentations will be distributed to the members as they are posted to Web sites or otherwise made available.*
 - ❖ *Ongoing and as scheduled and when available.*

4) Training is presented in multiple formats; e.g. video, Web based, Power Point, etc.

ACTIONS AND TIMETABLES:

- ❖ *This will be initiated in 2004-5, unless time and money are available earlier.*

5) A training schedule is developed and published regularly.

ACTIONS AND TIMETABLES:

- ❑ *Member Services will compile and publish a Web-based calendar of technology training available by Marmot and other entities.*
 - ❖ *Begin fourth quarter 2003 and update continuously.*

6) Training includes other technology related training; e.g. basic computer use.

ACTIONS AND TIMETABLES:

- ❑ *Other technology training will be determined based on request/need, such as back-ups, PC maintenance, electronic mail, LAN, databases, etc., and presented by Marmot staff or outside consultants. Attendance will be cost-based or at Extended Technical Support rates.*
 - ❖ *Ongoing.*

7) Tool kits for troubleshooting are developed and distributed.

ACTIONS AND TIMETABLES:

- ❑ *Operations staff will develop, distribute, and update checklists and FAQ's to be posted to the Members Only Web pages.*
 - ❖ *First quarter 2003 and ongoing.*
- ❑ *Operations staff will develop hardware functionality checklists and post them to the Members Only Web pages.*
 - ❖ *2004.*
- ❑ *Software diagnostic tools will be purchased and distributed as appropriate,*
 - ❖ *2004-5.*

8) Marmot conducts training sessions in conjunction with the regional library service systems' annual retreats.

ACTIONS AND TIMETABLES:

- ❑ *Member Services contacts Pathfinder, Three Rivers and Southwest during planning period to determine appropriate training to be offered at retreats.*
 - ❖ *First quarter 2003 and annually.*

MEASURES OF SUCCESS:

- Training is occurring in multiple locations and formats.
- Marmot staff is fully trained in system administration.
- Calls to the Marmot Help Desk are reduced because members are trained to fix routine problems.
- Criteria and protocols are established and adhered to outlining who makes trouble calls to Marmot, when, and who at Marmot is responsible for resolution.
- Trouble calls are responded to within one hour and resolved in a timely manner appropriate to the problem.
- Member library staffs ask questions that are appropriate and informed.

GOAL #3: A. ALL MEMBERS ARE RETAINED.

B. MEMBERSHIP IS INCREASED.

C. MARMOT IS WELL MANAGED AND FINANCIALLY SOUND.

STRATEGIC DIRECTIONS:

A. ALL MEMBERS ARE RETAINED.

1) Communication with members is continuous and done in a variety of ways.

✓ Contact to Marmot staff is promptly acknowledged.

ACTIONS AND TIMETABLES:

- ❑ *All telephone messages are returned within 24 hours.*
- ❑ *Help Desk messages are returned within 1 hour.*
- ❑ *E-mail is replied to within 24 hours.*
- ❑ *Staff "away" voice mail messages state alternate contact means and when to expect a return call.*
- ❑ *As appropriate, calls to Marmot staff that are away are forwarded to the Help Desk.*
 - ❖ *First quarter 2003 and ongoing.*

✓ The status of issues and problems is regularly updated.

ACTIONS AND TIMETABLES:

- ❑ *Major system upgrades, system-wide functionality breakdowns, and critical updates are immediately posted to the Allpoints listserv.*
 - ❖ *First quarter 2003 and ongoing.*
- ❑ *Troubleshooting meeting topics and status reports are posted to the Allpoints listserv.*
 - ❖ *Commence second quarter 2003 and ongoing.*

✓ Listservs and other means of e-communication are established and maintained.

ACTIONS AND TIMETABLES:

- ❑ *Allpoints listserv established 2002.*
- ❑ *Members Only Web pages established 2002.*
- ❑ *Web based archives are established for all Marmot/member information exchanges.*
 - ❖ *2003.*

✓ Improved means of communication is pursued.

ACTIONS AND TIMETABLES:

- ❑ *Marmot staff pursues avenues for communicating with members.*
- ❑ *Members provide feedback for improving communication.*
 - ❖ *Ongoing.*

✓ Marmot staff solves problems and disseminates solutions in a timely manner.

✓ Problems and solutions are shared among members.

ACTIONS AND TIMETABLES:

- ❑ *Problem resolution, work-arounds and FAQ's are posted to the listservs, posted to the Members Only Web site, and e-mailed or otherwise distributed as appropriate.*
- ❑ *Members post problems to the listservs and share in the solutions with Marmot staff.*
 - ❖ *Ongoing.*

2) Marmot staff visits member libraries on a regular basis.

ACTIONS AND TIMETABLES:

- ❑ *The Shadowing program is continued, improved, and expanded.*
- ❑ *Marmot staff visits member libraries and discuss concerns with member staffs.*
- ❑ *Marmot staff visit member libraries as called for in their Job Descriptions and stated goals in their annual Performance Reviews.*
 - ❖ *All members are contacted at least quarterly and visited at least annually by at least one Marmot staff member.*

3) Marmot staff and members are involved in statewide library and political activities.

- ✓ *New methods are created for members to become involved.*

ACTIONS AND TIMETABLES:

- ❑ *Marmot staff and members are encouraged to represent West Slope concerns on statewide committees and other groups.*
- ❑ *Members are informed of opportunities to participate in regional and state-wide activities.*
 - ❖ *Ongoing.*

4) Task forces, users groups and other committees are formed with specific charges and timelines.

ACTIONS AND TIMETABLES:

- ❑ *New groups are formed as needed and approved by the Executive Board.*
 - ❖ *Ongoing.*

- ✓ *Task forces find consensus when needed for direction.*

ACTIONS AND TIMETABLES:

- ❑ *The Chair of groups is rotated among member staff. Marmot staff serves as liaison, facilitates, and advises the groups.*
 - ❖ *Ongoing.*

MEASURES OF SUCCESS:

- *All members are retained.*
- *Members are involved in the consortium's decisions, governance, and activities.*
- *Members feel their information about Marmot is current.*

B. MEMBERSHIP IS INCREASED.

The purpose of expanding the membership base is to lower costs to each member and increase resource sharing.

1) The most appropriate type of consortium expansion is determined.

- ✓ The target size for expansion is studied.

ACTIONS AND TIMETABLES:

- ❑ *A market study is undertaken to determine libraries that may be potential Marmot members. The study includes a broad geographical and type of library investigation, e.g. BOCES, Front Range, Utah, Wyoming, New Mexico, western slope.*
- ❑ *Millennium is demonstrated to libraries expressing an interest in joining the consortium.*
 - ❖ *Begin 2004, Complete 2005.*
- ✓ The practical limit of expansion is determined in terms of geography, telecommunications, and staffing; i.e. 250 miles radius of Marmot offices; availability of high-speed telecommunications; regional offices.

ACTIONS AND TIMETABLES:

- ❑ *In response to potential new members, the availability of telecommunications will be determined, the ability of the Grand Junction office staff to travel to the new site (s), or the ability of Marmot to open a satellite office or contract with adjunct staff will be investigated.*
 - ❖ *Begin 2004, Complete 2005.*

2) The target market is determined.

- ✓ Mid-sized libraries that have an adequate budget to support membership.

ACTIONS AND TIMETABLES:

- ❑ *Libraries identified from the market study are targeted for membership, potentially including Pagosa Springs, Canyon City, Bayfield, Glenwood Schools, Grand County school systems, Farmington public, schools and community college, and others.*
 - ❖ *Begin 2004, Complete 2005.*

- ✓ Special libraries are targeted for membership; e.g. museum, medical, corporate.

ACTIONS AND TIMETABLES:

- ❑ *The Veteran's Administration Hospital, St. Mary's Hospital, community museums and historical society libraries are approached to join as mini-consortia.*
 - ❖ *Begin 2004, Complete 2005.*

- ✓ Out of state libraries pose issues that need to be resolved; e.g. Colorado Library Card, SWIFT, courier delivery, LSTA grant opportunities, etc.

ACTIONS AND TIMETABLES:

- ❑ *Issues are resolved when they arise as out-of-state libraries express interest in membership, e.g. SWIFT - use the III Holds function or purchase the III ILL module; Courier - investigate alternate delivery methods; CLC - extend borrowing privileges within the Marmot consortium; LSTA grants - apply for funds within the home state.*
 - ❖ *Ongoing as needed*

- ✓ Smaller libraries have options from non-Marmot entities offering smaller stand-

alone systems.

ACTIONS AND TIMETABLES:

- *The Marmot Council and Executive Board need to explore opportunities to attract smaller libraries.*
- ❖ *Begin 2003, Complete 2004.*

3) The member libraries' roles in marketing are determined.

ACTIONS AND TIMETABLES:

- *Consider creating incentives for members that recruit new members, such as additional staff sessions, fee reduction, etc., as determined by the Executive Board.*
- *Institute the principle of "each one reach one" recruitment.*
- *Members are encouraged to contact Marmot staff recommending potential libraries to be approached for membership.*
- *Marmot staff assists members in hosting demonstrations for potential neighboring libraries.*
- *Local, state, and regional publicity is generated when new members join Marmot.*
- ❖ *Ongoing.*

4) Former members may be interested in re-joining the consortium.

ACTIONS AND TIMETABLES:

- *Former members are contacted about Marmot membership.*
- ❖ *Ongoing. Western State College is presently in the process of rejoining and Montrose is discussing current membership benefits.*

MEASURES OF SUCCESS:

- *3-5 New members join Marmot.*
- *Former members have been contacted and understand Marmot's current services and price schedule.*
- *Marmot staff and members are actively recruiting new members.*
- *The membership cost has decreased and resource sharing has increased.*

C. MARMOT IS WELL MANAGED AND FINANCIALLY SOUND.

1) The price schedule is affordable.

ACTIONS AND TIMETABLES:

- ❑ *Price Schedule increases are minimized and reductions in fees are a long range goal as the number of members increases.*
- ❑ *Marmot endeavors to price products and services within the constraints of members' budgetary conditions.*
- ❑ *The cost savings of a consortium-shared integrated library system vs. stand-alone systems are quantified.*
 - ❖ *Ongoing.*

2) A multi-year financial plan is created.

ACTIONS AND TIMETABLE:

- ❑ *A three-year budget of income and expenditures is created and revised annually during the budget making cycle.*
 - ❖ *Annually drafted in July and approved in September by the Executive Board.*

3) The budget is balanced, including an adequate cash reserve.

ACTIONS AND TIMETABLE:

- ❑ *Staff prepares and the Executive Board approves a budget of income and expenditures annually that maintains as a cash reserve a minimum 25% and maximum 50% of operating expenses.*
 - ❖ *Annually.*

4) E-rate funds are used for new products, functionality, or services that benefit all members.

ACTIONS AND TIMETABLE:

- ❑ *Marmot staff, working with member committees, recommends priorities for expenditure of e-rate funds to the Executive Board for final approval.*
 - ❖ *Ongoing.*

5) Marmot staff is adequate, competent, and satisfied.

ACTIONS AND TIMETABLE:***ADEQUATE:***

- ❑ *A study is undertaken to compare the Marmot staffing levels to the industry benchmark and other library consortia.*
- ❑ *A plan is adopted to adjust staffing levels so the overall level is adequate.*
- ❑ *The growth in the complexity of the network is documented to Marmot members.*
 - ❖ *2004*

COMPETENT:

- ❑ *An internal survey is conducted to determine the current level of staff expertise in their job responsibilities.*
- ❑ *Funds continue to be budgeted for training and continuing education in LAN/WAN management, OS, security, infrastructure, telecommunications, e-mail, Internet services, etc.*
- ❑ *New staff are competent in their areas of responsibilities when they are hired.*
 - ❖ *Ongoing*

SATISFIED:

- ❑ *Salaries and benefits are maintained competitive to the market place.*
- ❑ *Employees are involved in decision-making, accountability, and problem solving.*
- ❑ *Work schedules are flexible when it does not detract from providing high-quality service to members.*

- *Morale is monitored and measures taken to improve balance work loads, reduce stress and improve productivity.*
 - ❖ *Ongoing.*

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MEASURES OF SUCCESS:

- The budget is adequate and affordable.
- All strategic directions are accomplished within the budget.
- There is an adequate cash reserve.
- Staff turnover is low.
- The auditor's report confirms the consortium is financially sound.
- Marmot's future is secure.
- The members trust the judgment of the Board and staff.

GOAL #4: MARMOT WILL EXPAND ITS SERVICES TO HELP MEMBER LIBRARIES BETTER SERVE THEIR USERS.

STRATEGIC DIRECTIONS:

Each new service proposed:

- ✓ Will be analyzed to determine the need and benefit to member libraries.
- ✓ A cost-benefit analysis will be conducted within a reasonable period.
- ✓ Staff recommendations will be discussed with the member representatives and approved by the Executive Board.

1) New services to be considered include, but are not limited to:

(New services already under development: extended technical support, ITS-MARC, self sign-up, print management.)

- Web site development and maintenance.
- Group database subscriptions (BCR). *NoveList is currently included with membership.
- Additional cataloging options.
- Web-based e-mail.
- Group calendaring

ACTIONS AND TIMETABLE:

- ❑ *Web site development and maintenance will be outsourced for libraries that need it, or done in-house if there is adequate demand and adequate staff levels. Member employees and outside consultants doing web work are given direct access to the server to maintain their sites.*
 - ❖ *2003 and ongoing*
- ❑ *The group subscription to NoveList is continued if it is determined the membership fees should support it.*
 - ❖ *Ongoing*
- ❑ *Negotiations are continued with BCR to broker consortium member data bases at reduced rates.*
 - ❖ *2004.*
- ❑ *Data bases not offered by BCR are investigated by Marmot member services staff and member representatives for Marmot member group subscriptions.*
 - ❖ *2004 and ongoing*
- ❑ *ITS-MARC is brokered for other members that want it. New cataloging sources are investigated by Marmot member services staff and member representatives as they become available and member demand warrants.*
 - ❖ *Ongoing*
- ❑ *Web based e-mail is implemented by the Unix administrator for all Marmot supported LANs and other sites that want it.*
 - ❖ *2003*
- ❑ *Group calendaring is implemented by the Unix administrator for Marmot staff and all members that want it.*
 - ❖ *2004*

2) New services are paid for by the member libraries that use them.

ACTIONS AND TIMETABLE:

- ❑ *The Price Schedule is revised as new services become available, such as self-sign up software and INNReach, to support the new services while keeping it flexible for members to "pick and choose" the services they desire.*
 - ❖ *Ongoing as needed.*

3) The expertise and number of Marmot staff must be adequate to support new services.

ACTIONS AND TIMETABLE:

- *This is accomplished in keeping with Goal 3, Strategic Direction C, 5.*

4) The advantages of being part of a consortium are maximized by facilitating the sharing of services among members.

ACTIONS AND TIMETABLE:

- *Library staff members share their expertise by training other consortium staff members.*
- *Additional group purchasing programs are instituted.*
- *A mentoring program is implemented.*
- *The Marmot staff shadowing program is adapted for members.*
- *Members investigate other opportunities for cooperation.*
- ❖ *Ongoing.*

MEASURES OF SUCCESS:

- New services are developed and they are paid for by the members that use them.
- All members are fully knowledgeable about system functionality and utilize the features that benefit their users and improve their workflow.
- The basic system remains functional and is well maintained.
- Member library staffs are sharing their time and expertise with other members.