

**PrairieCat Strategic
Directions,
FY2015 to FY2018**



In early FY14, the PrairieCat Sustainability Committee was charged with gathering input from the PrairieCat membership to develop a strategic directions document for the consortium. Input sessions were held in fall 2013 with the Administrative Council, the Delegates Assembly, and the Circulation, OPAC, Technical Services and Union List User Groups. Members who were unable to attend one of the sessions were also invited to send written feedback. Over several months, the Sustainability Committee carefully reviewed all member input and drafted the following document. The goals, objectives and outcomes are intended to provide direction for the next four years. The goals are not listed in priority order but rather have equal weight. The activities are included to provide a one to two year work plan which will be reviewed annually and revised as needed over the four years.

Mission Statement

PrairieCat engages members in sharing resources effectively and equitably, expanding the quality and quantity of information accessible to our library users.

PrairieCat value statements:

- **Cooperation** – We strive to share member resources as effectively and economically as possible.
- **Diversity** - We value and respect the contributions of others who have talents and abilities, constraints and opportunities that are different than our own, and strive to provide equal footing for libraries of all types and sizes.
- **Responsiveness** – We strive to provide excellent services by focusing on the needs and wants of our customers.
- **Engagement** - We value collaborative members with involved, well-trained, competent staff.
- **Access** – We strive for an effective, well-maintained catalog supporting strong member collections.
- **Relevance** – We support libraries in making a value-added impact in their communities through shared services and innovation.
- **Excellence** – We work to sustain a consortium that leverages our size to the benefit of the members, and provides the appropriate resources, leadership and services in pursuit of excellent library service.

Goals and Strategic Objectives

Goal: PrairieCat shares member resources effectively and economically.

Objective: All libraries follow PrairieCat, RAILS and ILLINET resource sharing policies responsibly.

Outcome: All PrairieCat libraries process their paging lists every day they are open and fill requests as conscientiously as possible. All PrairieCat libraries complete all required holds management processes to ensure that user requests are filled efficiently.

Activities:

- **Provide opportunities for regular Essentials, Circulation and Union List Circulation training.**
- **Work with the Training Committee to provide and maintain training tools including handouts, technical bulletins, cheat sheets and other tools on holds management processes.**
- **Monitor daily, weekly and monthly holds management processes to ensure that all members are completing required tasks.**
- **Provide templates or easy instructions to allow members to run their own monthly and annual circulation and holds statistics easily in Decisions Center.**
- **Monitor holds statistical reports to determine any compliance issues for semi-annual review by the Administrative Council.**

Outcome: All PrairieCat libraries follow new resource sharing procedures based on revisions to the ILLINET ILL code and new statewide delivery standards.

Activities:

- **Work with the Illinois library community to begin implementing changes to statewide delivery procedures, making adjustments in PrairieCat settings and procedures as needed. Investigate options for Sierra-based routing slips that address new statewide labeling criteria.**

Objective: All libraries contribute to a broad and diverse catalog.

Outcome: All PrairieCat libraries maintain collections that meet their users' basic needs within budget constraints. Wherever possible, they also purchase materials that contribute to the breadth of our shared catalog.

Activities:

- **Provide regular training to all members on use of the High Demand Holds report to assist with local collection development.**
- **Develop a means for members to identify special collection strengths and/or partner in regional cooperative collection management projects.**

Goal: PrairieCat strives to ensure inclusiveness and provide equal footing for libraries of all types and sizes.

Objective: PrairieCat governance policies and procedures are reviewed regularly to ensure all libraries are treated equitably with respect for local autonomy.

Outcome: All PrairieCat members feel that governance, representation, membership levels and fees are equitable.

Activities:

- **Review the Bylaws and the General Policy Manual at least annually and make recommendations on any needed changes. Review the PrairieCat Strategic Directions document and work plan activities at least annually and revise the work plan as needed.**
- **Review representation, membership levels and fee formulas at least annually based on feedback at Delegates Assembly and the Union List User Group meetings, and make recommendations on any needed changes.**
- **Investigate incorporating bibliographic utility fees into the PrairieCat budget for fairer distribution of costs between members.**

Objective: PrairieCat welcomes and encourages all members' voices and participation.

Outcome: All PrairieCat members are active participants in meetings and decision-making.

Activities:

- **Investigate a rotating user group Chair/Vice-Chair methodology.**
- **Hold at least one in-person meeting annually for CUG, OPAC and TSUG.**
- **Work with committee and user group chairs to prepare the agenda, posting all meeting agendas/packets no later than two days in advance of all meetings.**
- **Post draft meeting minutes no later than two weeks after each meeting.**
- **Continue to track attendance at Delegates Assembly and user group meetings to provide to Administrative Council for their semi-annual compliance reviews.**
- **Provide reliable technology options for remote participation in meetings.**

Outcome: New members and new directors feel informed and included.

Activities:

- **Continue sending new director welcome letters.**
- **Provide new director information to the appropriate Administrative Council representative so they can make a personal contact.**
- **Create a "What Is PrairieCat?" orientation brochure/packet.**
- **Develop a new member orientation packet.**
- **Introduce new directors at Delegates Assembly meetings.**

Objective: PrairieCat members proactively provide library to library assistance.

Outcome: PrairieCat has established procedures to facilitate formal and informal mentoring between libraries.

Activities:

- **Assign a "buddy" library to new or upgrading members of PrairieCat (preferably a geographic neighbor) that they can call on with questions or for help as they "Go Live."**
- **Identify a group of volunteers from each User Group that are willing to assist new staff getting up-to-speed on PrairieCat policies and procedures.**
- **Use L2 to create and maintain directories of CUG, OPAC, TSUG and ULUG contact information.**
- **Work more with other RAILS LLSAP staff, sharing expertise, best practices, training handouts, etc.**

Objective: PrairieCat welcomes new member libraries and encourages all member libraries to participate at as high a membership level that is economically feasible and fits their local situation.

Outcome: All PrairieCat members are at the tier level stipulated by the PrairieCat Membership Tier Eligibility policy by FY17.

Activities:

- **Assist Union List libraries that are moving up to Fully Participating or Basic Online membership to set their upgrade schedule and progress to Go Live.**
- **Provide membership quotes to prospective new members.**
- **Work with new members to begin the process of joining, setting a schedule, and progressing to Go Live.**

Goal: PrairieCat leverages our size for the benefit of the membership.

Objective: PrairieCat researches, introduces and implements where appropriate new or additional products for group purchase/use for the integrated library system.

Outcome: All products and functionality purchased as part of the Innovative migration are completely installed.

Activities:

- **Finish implementation of E-Commerce for Encore, Program Registration and Express Lane (if purchased).**
- **Finish implementation and training for Program Registration and Quick Click Acquisitions.**
- **Finish implementing limits by format and circulation options.**

Outcome: New or upgraded Innovative products are implemented on a timely basis, based on member needs and input, and using a pricing model that is fair to all members.

Activities:

- **Upgrade Sierra regularly as new versions become available.**
- **Upgrade to Encore 4.4, working with members to test and implement integration with e-resources.**
- **Investigate purchase and implementation of Express Lane self-service functionality for interested member libraries.**

Objective: PrairieCat works with RAILS, RAILS consortia, and other consortia on mutually beneficial cooperative projects including group purchasing.

Outcome: PrairieCat works to support the fiscal stewardship of the PrairieCat consortium.

Activities:

- **Actively participate in the RAILS Consortia Committee shared projects including investigation of a resource sharing overlay product.**
- **Continue working with the RAILS cataloging work group on shared projects including cataloging training for members.**
- **Partner with RAILS to host regional library vendor fairs, identifying third-party vendors that members would like to have represented.**
- **Work with RAILS to research new products for group purchase and negotiate favorable vendor contracts.**

Goal: PrairieCat contract staff provides knowledgeable support and resources.

Objective: PrairieCat regularly evaluates staffing needs and works through the contract with RAILS to adjust as needed.

Outcome: PrairieCat has sufficient staff to meet member needs and complete projects on a timely basis.

Activities:

- **Review current PrairieCat services and determine any needed adjustments before contract negotiation.**
- **Negotiate a new contract with RAILS for services for FY15 and beyond.**

Objective: PrairieCat contract staff is given professional development opportunities to learn or enhance skills.

Outcome: PrairieCat budgets for vital professional memberships and conferences for PrairieCat contract staff or for designated representatives not funded by RAILS or the local library.

Activities:

- **Budget for at least two PrairieCat contract staff and the Training Committee Chair to attend IUG conferences within driving distance, and at least one staff member and the Training Committee Chair when airplane travel is required.**
- **Complete more in-depth training for new videoconferencing equipment, Fuze or Adobe Connect so that all staff is comfortable scheduling, leading and recording events.**
- **Negotiate with RAILS for a possible budget for staff professional development covered by the RAILS budget.**

Objective: PrairieCat contract staff provides good, responsive customer service and are accessible in a multitude of ways (Help Desk, email, phone, on-site)

Outcome: All issues from member libraries are responded to promptly and courteously with initial response within one working day. For more in-depth projects or issues, members are given regular updates at least every two working days until resolved.

Activities:

- **Ensure that all staff is available via phone, email or PrairieCat Chat whenever they are on regular duty.**

- **Implement the new OTRS Help Desk.**
- **Ensure no more than 100 open Help Desk incidents at one time.**
- **Complete more Yoda training for better remote assistance to members.**
- **Make site visits to at least 25 PrairieCat member libraries annually.**
- **Respond to all requests for circulation setting changes from member libraries within three working days, or for more in-depth projects provide updates at least weekly.**
- **Respond to all requests for lists or reports from member libraries within three working days, or for more in-depth projects, provide updates at least weekly.**
- **Continue PrairieCat staff cross-training and documentation.**

Objective: PrairieCat staff provides technology support for issues related to connectivity to PrairieCat and related third-party services.

Outcome: All PrairieCat libraries connect to the ILS and related third-party products with few connectivity issues.

Activities:

- **Move all member workstations to nowebstart Sierra.**
- **Provide assistance via Help Desk, phone, email when members are unable to connect to PrairieCat services. Work with the member library's technology staff or vendor representative to troubleshoot software or hardware issues related to PrairieCat connectivity.**
- **Provide on-site assistance for severe issues related to connectivity to PrairieCat services (e.g., where remote support has been unsuccessful, member is unable to connect to PrairieCat or connectivity is severely degraded, and support has been escalated).**
- **Provide assistance via Help Desk, phone or email with installing or updating Sierra software on library workstations.**
- **Provide product information and vendor sources for peripheral devices used in connection with PrairieCat services such as scanners, receipts printers and inventory devices.**
- **Provide assistance with use of inventory devices to interface with Sierra.**
- **Provide assistance with setup for interfacing and authentication with third party products such as self-check, PC reservation, subscription services, etc.**
- **Provide phone, email or on-site consulting for new libraries or libraries moving up to full circulation, to ensure that network configurations and workstations are sufficient for full circulation.**

Objective: PrairieCat staff undertakes other special projects as needed or upon request from the membership.

Outcome: All special projects are completed in a timely manner.

Activities:

- **Investigate and implement new notice printing procedures.**

- **Complete the removal of all withdrawing library information.**
- **Finish the OCLC reclamation record clean-up project.**
- **Complete the backload database enrichment project with MARCIVE, and then begin regular monthly processing with MARCIVE to ensure that reading levels, series information and other record enhancements provide better search results for end-users.**
- **Investigate greater user of SQL access into the database for use on member special projects.**
- **Complete the set-up of corporate central files for PrairieCat.**

Goal: PrairieCat members are well-versed on PrairieCat policies, procedures and functionality.

Objective: PrairieCat provides ongoing training opportunities and tools for staff in a variety of formats.

Outcome: All PrairieCat member staff is well-trained and comfortable with all aspects of the Sierra and Encore software.

Activities:

- **Provide opportunities for regular Essentials, Circulation and Union List Circulation training. Provide Cataloging, Serials, Acquisitions and Create List training on-demand. Provide training on other modules on a regular basis.**
- **Record basic training sessions for member staff review at their convenience.**
- **Identify regularly reoccurring policy/procedure issues and target communications or refresher procedural reviews at user group meetings to address those issues.**
- **Work with the Training Committee to provide and maintain training tools including handouts, technical bulletins, cheat sheets and other tools to help staff use the software effectively.**
- **Implement a regular schedule for refreshing the training/testing server for staff and member use for internal testing, training and practicing.**
- **Develop a checklist of required competencies for circulation and technical services staff with a goal of developing expanded training opportunities in the future.**

Objective: PrairieCat supports uniform customer service through enforcement of policies and procedures.

Outcome: All PrairieCat member staffs are well-versed on all PrairieCat policies and procedures.

Activities:

- **Continually maintain the General Policies, Circulation, Technical Services and the Union List Policy & Procedures Manuals to ensure they are comprehensive and current, and available on the website.**
- **Investigate a bylaws revision to set minimum attendance standards for user group meetings to ensure staff is well-informed on software and policy or procedural changes.**

Goal: PrairieCat end users have a positive library experience.

Objective: PrairieCat provides an easy to use, fully-integrated catalog/system.

Outcome: All PrairieCat member end-users are able to find the information they seek using the PrairieCat online catalog.

Activities:

- **Work with Innovative to enhance scoping functionality to be able to readily identify local resources first.**
- **Upgrade to Encore 4.4, working with members to test and implement integration with e-resources.**
- **Finish implementation of E-Commerce for Encore, Program Registration and Express Lane (if purchased).**
- **Complete the backload database enrichment project with MARCIVE, and then begin regular monthly processing with MARCIVE to ensure that reading levels, series information, and other record enhancements provide better search results for end users.**
- **Work with members to integrate other products such as Novelist and other third-party products where compatible with Innovative products.**

Objective: PrairieCat provides tools to assist end users in their use of Encore and other patron services.

Outcome: All end-users are informed about PrairieCat services and have the tools they need to use them effectively.

Activities:

- **Work with the Training Committee to provide and maintain end user training tools, including brochures and video clips.**
- **Create a public web page for PrairieCat with links to member libraries and training tools.**

Objective: PrairieCat provides options for patron self-service and social networking, implementing emergent technologies as appropriate.

Outcome: PrairieCat member end users have available desired self-service and social networking options within the constraints of the local library.

Activities:

- **Investigate purchase and implementation of Express Lane self-service functionality for interested member libraries.**
- **Continue to adjust notice delivery settings to ensure they are effective for end-users.**
- **Provide e-commerce options for payment of fines, bills and program fees.**

Goal: PrairieCat maintains a clean, duplicate-free database.

Objective: All PrairieCat libraries follow established cataloging standards and keep holdings updated to ensure ease of access to materials by end users.

Outcome: All PrairieCat member holdings are completely up-to-date in both the PrairieCat database and PrairieCat's chosen bibliographic utility.

Activities:

- **Offer barcode certification testing monthly to certify a library staff member's competency to select the correct bibliographic record, identify and report problems, and add items to the database following PrairieCat policies.**
- **Update the barcode certification tests to include Sierra language and updated format examples.**
- **Load bibliographic records within two business days of submission by members via OCM lists of bibliographic records.**
- **Complete batchloading of holdings information at least six times a year to a bibliographic utility as may be required by the Illinois State Library.**
- **Provide free original cataloging to members based upon the agreed tiered model. Provide other fee-based original cataloging to members who contract for additional services.**
- **Continue ongoing bibliographic record clean-up reported via the website or cleanup email.**
- **Finish post-migration clean-up of bibliographic material types, item cleanups, volume records, etc.**
- **Offer basic cataloging training in partnership with other RAILS LLSAPs. Create a self-paced Cataloging 101 tool/document for new staff.**

Objective: Increase the number of MARC-lite or MARC catalogers in PrairieCat member libraries to ensure that new titles are added promptly and the database is well-maintained.

Outcome: All popular new titles are added to the PrairieCat database at the time of order so that end-users are able to place holds.

Activities:

- **Continue recruiting new MARC-Lite catalogers, assisting them with completing the checklist of necessary training and passing the MARC-Lite cataloging test.**
- **Finish development of the MARC (original) cataloging test and begin testing for new MARC catalogers.**
- **Investigate implementing a fee credit for libraries of MARC catalogers.**

Goal: PrairieCat communicates effectively internally and externally.

Objective: Investigate new ways to communicate more effectively with member libraries.

Outcome: All PrairieCat member libraries feel informed and engaged.

Activities:

- **Work with committee chairs to prepare the agenda and to post all meeting agendas/packets no later than two days in advance of all meetings. Post draft meeting minutes no later than two weeks after each meeting.**
- **Implement a new instant messaging client for PrairieCat libraries and ensure that it is installed on all workstations that have Sierra installed.**
- **Hold at least one in-person CUG, TSUG and OPAC User Group meeting annually.**
- **Post at least four news items monthly on the PrairieCat support website.**
- **Publish a monthly newsletter including user group columns with updates, and features on member libraries and their contributions on behalf of the PrairieCat membership.**
- **Continue to enhance the PrairieCat support website with helpful information for the membership. Convert all forms on the website from paper to online.**

Objective: Develop promotional materials to encourage existing members to upgrade or new members to join.

Outcome: Non-circulating and non-PrairieCat libraries consider PrairieCat one of their top options when making their next automation decision.

Activities:

- **Create a “What Is PrairieCat?” orientation brochure/packet for prospective members.**
- **Create a brochure aimed at decision-making authorities that summarizes the benefits of consortium membership versus standalone.**
- **Create a brochure for Union List members to share with their decision-making authorities summarizing the benefits of circulating membership.**

Goal: PrairieCat assists member libraries with making a value-added impact on their communities.

Objective: PrairieCat works collaboratively on marketing materials that emphasizes the library’s relevance and value for its community.

Outcome: PrairieCat members can demonstrate their value to their communities with the assistance of PrairieCat reports and statistics.

Activities:

- **Develop report templates or easy instructions for reports in Decisions Center for library administrators to present to boards or other key stakeholders.**
- **Provide monthly statistical reports and other custom reports as requested that provide information needed to share with funders and other decision-makers.**
- **Work collaboratively on marketing materials that help demonstrate the return on investment members are providing in their communities.**