

PrairieCat Strategic Plan 2017-2021



Introduction

All organizations need a strong strategic plan. Such plans provide direction and focus to an organization as it changes and grows over the course of time. PrairieCat, as an organization that is both growing and changing, now finds itself in need of a defining and guiding document as we move forward into the next five years.

This plan represents the overall strategy for PrairieCat for the next five years and is presented to the Delegates Assembly for approval. Upon approval, PrairieCat staff and the Admin Council will finalize annualized Activity Plans that will support the overall strategy. While we don't anticipate any major changes in the overall strategy, the Activity Plans are living documents that will change as we work towards goals. The Admin Council will regularly review progress towards meeting plan goals and report to Delegates.

Our planning process was validating and enlightening. PrairieCat has grown and changed in many ways since our last planning process, but members remain committed to resource sharing and service. PrairieCat is only as strong as its members, so we hope that you will read this plan and feel compelled to join us as we seek to grow and change over the next five years.

Background

PrairieCat faces many challenges in the current climate: budget uncertainty, rising costs of technology and library systems and diminished sources for those systems, geographic dispersal of membership and staff. The nature of our partnership with Reaching Across Illinois Library System (RAILS) and the necessity to facilitate increased independence from that body create a need for an examination of PrairieCat capacity and an understanding of what this independence means for our future. With these issues in mind, we entered into the strategic planning process with hopes that a plan would help us address these issues.

Amanda E. Standerfer, a strategic planning consultant and librarian, was hired to guide us through the planning process. PrairieCat staff and the Admin Council served as the planning team and met in December 2016 to design the planning process. Delegates met in January to approve the process and move forward with the consultant.

Planning Process

In order to create a cohesive, actionable plan, we needed to gather feedback across a wide array of stakeholders. PrairieCat staff, administration, governance, and membership were included, and several feedback mechanisms were employed.

After the process design meeting and initial feedback from the Admin Council in December 2016, PrairieCat staff held six Zone Meetings (Zones based on former RAILS Zones and geographically distributed in the PrairieCat region). These meetings allowed for members to give input into the strategic plan by identifying strengths, opportunities, barriers, and values. Attendees considered patterns that surfaced through the discussion and reflected on priorities.

After the Zone Meetings, the Admin Council met to de-brief the discussions and discuss next steps. Data gathered revealed four key theme areas and a survey was conducted planned to validate these themes

and get additional feedback. With the four key theme areas now solidified, the planning process narrowed focus to fully develop these areas for the strategic plan.

On May 23, 2017, approximately 40 PrairieCat members gathered at the Kishwaukee College in Malta for a day-long Summit. Attendees divided into groups based on the four key theme areas. Discussions helped define the key theme and brainstorm goals and activities. All data gathered to this point in the process was synthesized into a draft plan.

After reviewing and refining the plan, along with the mission, vision, and values statements, at the Admin Council meeting on July 7, 2017, PrairieCat staff and the consultant worked to develop a final draft for approval at Delegates in October.

Mission, Vision, Values, Themes

Mission:

PrairieCat assists members in the successful sharing of resources and services, expanding the quality and quantity of information accessible to our library users.

Our mission remains largely unchanged from the last plan and continues to reflect our core values and commitment to collaboration to best meet the needs of the patrons of our member libraries. Our mission is the core of what we do together and is our promise to each other.

Vision:

Connecting libraries to strengthen communities.

Our vision is what we hope to see in the world if we successfully carry out our mission. Connected libraries mean stronger communities – plain and simple. We feel that this vision is compelling, memorable, and easily understood by all stakeholders.

Values:

- *Collaboration* – 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.
- *Innovation* – 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.

Our values remain largely the same as our previous plan as well with some minor language updates. This plan is rooted in these values and are kept in mind as we operationalize this plan. PrairieCat members share these values and embody them at their libraries on a daily basis.

Key Themes:

This plan is divided into four key theme areas: Engagement, Governance, Training, and User Experience. As noted in the Planning Process section, these themes emerged during the initial months of the process and were validated by a membership survey. Summit attendees gave input into “vision statements” for each theme, which represent what PrairieCat aspires to achieve through this plan.

This image serves as a high-level reminder of our focus during the life of this plan and gives a snapshot of what we hope our members will see in us if we are successful. We plan to use this image as a reminder to members of how we are organizing our work and how they can connect with us.



Outcomes

What we are doing right: At its very core, PrairieCat exists to provide an integrated library system (ILS) to members. Having a central ILS provides efficiencies to the 130+ members and allows for maximum resource sharing that benefits hundreds of thousands of library patrons.

PrairieCat has successfully grown circulating membership as a result of its last strategic plan and seeks to build on its success through this plan over the next five years.

What we need to do more of:

PrairieCat needs to be very mindful of our need to remain sustainable for the future. Reliance on sources of revenue from the state/RAILS has proven to be somewhat tenuous and is not guaranteed in the future. PrairieCat must assume a decreasing role in state funding over the course of the coming years, and plan for a worst-case scenario that permits operations with minimized funding from these sources.

Likewise, many members voiced a desire to pursue the opportunities that group purchasing of some services and software might bring to our membership. Creating an organization that would allow for such purchasing, while at the same time allow those members who are interested in just sharing an Integrated System as we do currently, is something that PrairieCat should pursue in the future.

We should be mindful of creating an organization that can accommodate multiple levels of involvement in order to allow for the varying needs and resources of our membership.

What we need to start doing better:

PrairieCat members are very diverse in size and type, community make up, and level of engagement with the organization. As with many membership organizations, not all members are as active as they would like to or are able to be. PrairieCat needs to work harder on creating engagement opportunities for all members. In the past, geography has been a barrier, but tools and technologies are now readily available and easy to use that eliminate those barriers.

Engagement is also difficult to measure. This plan includes tools that PrairieCat can use to define successful engagement and metrics to track progress. More engagement means stronger connections between members, better networking, and ultimately a more satisfying experience.

In order to promote engagement with our membership as well as our end users, a coordinated marketing plan must be developed and implemented. This plan should be a part of our overall communications plan, which should also be developed for both internal and external stakeholders.

Our members were loud and clear during this process that they need more training.

Training has always been of fundamental importance to PrairieCat. After all, members would not be able to use the ILS if they were not properly trained. However, we heard through the planning process that training needs are changing and this plan incorporates goals that will help us update and improve our training.

Goals, Activities, Measures

The following page is a one-page summary of this strategic plan. It includes the vision statements for each of the four key theme areas and details the goals in each area. Following the one-page summary is additional detail for each theme area, including some proposed activities for each goal and thoughts on possible metrics. The complete Activity Plan is being drafted by staff and the Admin Council and will serve as an implementation guide during the life of this plan. Progress toward meeting plan goals will be regularly reported at future Delegates meetings.

Engagement

PrairieCat seeks to deeply connect with members and create stronger connections between members. As mentioned above, engagement is a very personal concept and means different things to different people. Through the goals of this key theme, we hope to better define successful engagement and create additional opportunities for engagement. We also want to be responsive to how members want to engage and respectful of their uniqueness and abilities.

Goal 1: *Members feel informed and connected through targeted, one-way communications.*

Activities include:

- Finalizing and implementing a Communications and Marketing Plan.
- Developing a graphic yearly meeting calendar.

Goal 2: *Members have strong relationships through personal connections and two-way communication.*

Activities include:

- Continuing Zone Meetings.
- Developing an organized mentoring program.
- Formalizing new member orientation.

Goal 3: *Members are empowered and actively participate in their organization.*

Activities include:

- Forming a Member Engagement Committee to work on an engagement program.
- Developing leadership recruitment plans.
- Adding networking opportunities and fun activities to the Delegates Assembly meetings.

Goal 4: *Strengthen the PrairieCat brand so that it is easily recognized by stakeholders.*

Activities include:

- Reaching out to prospective members.
- Building relationships with vendors.
- Re-designing the logo and Website.

How will we know we are successful?

Metrics include: Tracking face-to-face meeting participation, number of site visits, and percentage of voter participation in elections.

Governance

PrairieCat is facing significant changes in governance over the next five years, including separating staff from RAILS. Governance issues are not as compelling as other aspects of this plan, but they are the bedrock for organizational growth. Successfully reaching these governance goals means that the organization is stronger and sustainable in five years. Without sustainability, none of the other activities matter.

Goal 1: *PrairieCat is sustainable and independent.*

Activities include:

- Separating staff from RAILS.
- Developing a business plan.
- Building financial reserves and implementing multi-year budgeting.

Goal 2: *PrairieCat has a learning culture supported by continuous improvement.*

Activities include:

- Reviewing and revising Bylaws.
- Reevaluating representation tiers.
- Streamlining voting at the Delegates Assembly meetings.

Goal 3: *Leadership is innovative and creates a vision that inspires members.*

Activities include:

- Organizing a team to develop and initiate enhanced membership options.
- Adding educational components to the Delegates Assembly meetings.
- Developing a plan for growing the membership.

How will we know we are successful?

Metrics include: Percent of budget provided by RAILS, staffing independence, and annual member satisfaction feedback (collected via a survey).

Training

Without training, PrairieCat members are unable to use the ILS to the best of their abilities. Training is also at the core of PrairieCat's commitment to continuous improvement with members. Through training, PrairieCat is able to connect with staff at member libraries that they might not otherwise have the opportunity to meet. Developing relationships with all staff-level users at member libraries is important for understanding their needs and improving training sessions and materials.

In addition, this plan seeks to establish training benchmarks and make improvements based on outcomes. By more systematically tracking and evaluating training, we will holistically approach change in this theme. We'll also learn how to make the best use of technology tools that will enhance our success.

Goal 1: *Training opportunities are well advertised and materials are easily accessible.*

Activities include:

- Updating designated training contact for each member.
- Utilizing multiple methods for advertising training.
- Reorganizing the Website so training and training materials are easy to find.

Goal 2: *Training is available and responsive to member needs.*

Activities include:

- Expanding training formats.
- Developing the mentoring program to include a training component.
- Including training opportunities at Zone Meetings.

Goal 3: *Training opportunities and materials are evaluated to ensure their quality and effectiveness.*

Activities include:

- Developing an evaluation framework for training and training materials.
- Tracking training by member and individual library staff.
- Developing a badging program.

How will we know we are successful?

Metrics include: Number of training participants, events, and contact hours, participation in a badging program, and annually reviewing benchmarks, changes needed, and growth areas (collected via a survey).

User Experience

Ensuring a great experience for patrons of PrairieCat member libraries is the most public and far-reaching aspect of this plan. Patrons of member libraries are diverse in all ways imaginable and PrairieCat wants to empower members to connect with their patrons through their collections, shared resources, and other cooperative services.

This goal goes beyond PrairieCat members and seeks to incorporate feedback from the end users. After all, we need to understand what users want if we want to improve their experience. This key theme will continue to grow and evolve as we learn from users and aspire to improve our services.

Goal 1: *PrairieCat designs services focused on meeting user needs and improving end user engagement.*

Activities include:

- Establishing a User Experience Team to coordinate activities and user feedback.
- Looking for opportunities to standardize loan periods and policies.

Goal 2: *PrairieCat enhances services to further meet the needs of diverse users.*

Activities include:

- Considering expanding the languages available in the card catalog.
- Implementing a mobile app for the catalog.
- Develop policies and practices for non-traditional materials.

How will we know we are successful?

Metrics include: Usage statistics for end user products and services, user satisfaction and knowledge of services survey, and annually reviewing benchmarks, changes needed, and growth areas (collected via a survey).