



## **Southeastern NY Library Resources Council Strategic Plan for 2021-2026**

### **Executive Summary**

The strategic planning goals for Southeastern consists of the following high-level objectives:

1. Revise communication methods to expose members to the full range of Southeastern's services.
2. Enhance the organization's professional development programs, therefore nurturing a culture of library leadership in the Hudson Valley.
3. Continue to support and expand technology services to members, focusing on helping organizations make informed, strategic decisions related to Southeastern services.
4. Foster a culture of equity, diversity, and inclusion in libraries and cultural heritage organizations, to better reflect the diverse community served by our members.
5. Increase revenues for the organization, through a combination of small dues increases over the next five-years, and the exploration of new revenue streams.

This plan integrates strategic planning goals with the goal elements required by the Division of Library Development as part of Southeastern's five-year Plan of Service.

### **Mission Statement**

Southeastern New York Library Resources Council connects the region's community of libraries and cultural heritage organizations to information, resources, support, and professional development opportunities to enhance the capacity for services, advocacy, outreach and engagement for members.

### **Vision Statement**

In order to meet the needs of our members with excellence, we aspire to be an inclusive, member-focused organization that serves the libraries and cultural heritage communities in our region with a comprehensive suite of accessible resources and services.

### **Planning Process**

This plan was developed by the Planning Committee of the Board of Trustees and Southeastern staff, working closely with a consultant, Healthy Organizations Consulting. The consultant held stakeholder focus groups with Southeastern members and distributed a survey. Based on the

consultant's report and recommendations, trustees formed work groups to develop new mission/vision statements and new goals and objectives. Southeastern staff and trustees took the results of the work groups and developed the strategic goals and the goal elements for the Plan of Service. The plan was approved by the Board of Trustees on March 18, 2021.

## **Board of Trustees, Planning Committee**

Mary Jo Russell, Chair, Nuvance Health / Vassar Brothers Medical Center

Mary Ellen Leimer, Board President, Retired, Assistant Superintendent Newburgh Free School District

Ginny Dunnigan, St. Thomas Aquinas College

Ellen Rubin, Retired, Wallkill School District

Amy Schuler, Cary Institute of Ecosystem Studies Library

Laurie Shedrick, Mid-Hudson Library System

Beth Zambito, Newburgh Free Library

## **Team Summary**

The staff team members of Southeastern, who, together with the Board President, Planning Committee, and other trustees as determined, will be charged with the successful execution of this plan, are as follows:

Tessa Killian, Executive Director

Jennifer Palmentiero, Digital Services Manager

Zachary Spalding, Systems Manager

Carolyn Glauda - Education and Outreach Librarian

Moshe Siegal - Office Manager

Liz Gurdin - Finance Manager

Kelsey Milner - Resource Sharing and Cataloging Librarian

Sarah Holsted - Hospital Library Services Program Manager

## **Goals and Results**

*[Note: Goals statements in **blue** are in the Plan of Service and in **red** are strategic goals.]*

### **RESOURCE SHARING Cooperative Collection Development**

**Goal Statement** Southeastern will facilitate access for eligible academic libraries to Coordinated Collection Development Aid and manage a regional plan for coordinated collection development.

1. **Intended Result(s)** Participating academic libraries will have resources to build collections in designated subject areas and shared knowledge of regional collections.

### **RESOURCE SHARING Catalog Services**

**Goal Statement** Southeastern will support and maintain two systems for access to regional holdings: a virtual union catalog, reflecting library holdings from regional libraries; and an online library system for individual libraries to manage library holdings.

1. **Intended Result(s)** Members will have online platforms to share information about their collection holdings and the training to use them effectively.

**Goal Statement** Southeastern will support and maintain access to archival finding aids using formatted encoded archival descriptions (EAD).

1. **Intended Result(s)** Members will have an online platform to create and share their archival holdings and the training to use it effectively.

### **RESOURCE SHARING Delivery**

**Goal Statement** Southeastern will facilitate, and regularly educate members about, the physical delivery service options that link libraries in the region and statewide.

1. **Intended Result(s)** Members know the delivery options that are available to them. Members will be able to share physical resources with libraries in the region and statewide.

### **RESOURCE SHARING Interlibrary Loan**

**Goal Statement** Southeastern will maintain and support a regional interlibrary loan system, SouthEastern Access to Libraries (SEAL), for all types of libraries and will facilitate access to materials from outside the region for members and member systems (For example OCLC, DOCLINE).

1. **Intended Result(s)** The region's libraries will have the knowledge to use SEAL and member libraries will have access to materials from outside of local holdings.

**Goal Statement** Explore new methods for members to share resources, in particular by integrating catalogs (APIs and or ProjectReshare).

1. **Intended Result(s)** Increased opportunities for resource sharing integration for member libraries.
2. **Initiatives/actions**
  - a. Research the possibility of SEAL Integration with public library systems, and other members, through the use of APIs.
  - b. Foster collaborations among library systems and between systems and vendors and advocate for better lending / purchasing agreements, such as inter-system lending agreements for public and school libraries.
  - c. Monitor trends in inter-library loan that could possibly be offered as a service to Southeastern members. (The ILL of videos from vendors; Controlled Digital Lending (CDL); expanded discovery capability for SEAL).

**Goal Statement** Southeastern will provide regional libraries with the information, awareness, infrastructure, and support to use the Medical Information Services Program (MISP).

1. **Intended Result(s)** Regional libraries will have access to and will have the capacity to provide published medical information. **RESOURCE SHARING Digital Collections Access**

**Goal Statement** Southeastern will support and maintain systems that provide online access to and long-term storage for our members' digital collections.

1. **Intended Result(s)** Member libraries and cultural heritage organizations will have online platforms to share their digital collections and a long-term storage solution to help safe-guard those collections for the future.

### **SPECIAL CLIENT GROUPS Hospital Library Services**

**Goal Statement** For eligible hospital libraries, Southeastern will facilitate access to electronic resources, will provide contract services, and will support continuing professional development and the capacity to advocate and make informed strategic decisions that are needed to deliver current, evidence-based information services to their healthcare staff and hospital administration.

1. **Intended Result(s)** Participating hospital libraries will have access to resources and services that enable informed strategic decisions and that support delivery of point-of-need health care information to hospital staff.

### **PROFESSIONAL DEVELOPMENT AND TRAINING**

**Goal Statement** Southeastern will provide professional development, networking, and training for library workers to develop their professional skills and knowledge.

1. **Intended Result(s)** Members will have access to a coordinated program of professional development, training, and networking events.

**Strategic Goal Statement** Create a blueprint for yearly programming, which is separate from training on Southeastern services (SEAL, NYH, etc.) and include annual programs like SENY-Con and the annual meeting.

1. **Outcomes**
  - a. Increased engagement with members and affiliate members, measured through increased participation in SIGs, PD/CE and SENYCon.
  - b. Library workers have access to new and relevant PD/CE so that they have the tools to excel in their work, measured by program data collected by Southeastern.
2. **Initiatives/actions** Plan programs that consider: topic, audience, modality, other CE opportunities. **Strategic Goal Statement** Implement services that provide a platform for members to prepare for leadership roles.
  1. **Outcome** A culture of library leadership in the Hudson Valley, demonstrated by member participation in the leadership services developed by Southeastern.
  2. **Initiatives/actions**
    - a. Offer services for member staff to share knowledge and cultivate leadership, like

- i. A mentorship program
- ii. Library shadow program
- iii. Special interest groups

## **CONSULTING AND DEVELOPMENT SERVICES**

**Goal Statement** Southeastern will provide consulting and development consultations for services provided by the council.

1. **Intended Result(s)** Members will have access to assistance from Southeastern staff in areas such as library catalogs, technology, website development, resource sharing, management issues, and digitization.

## **COORDINATED SERVICES FOR MEMBERS Digitization Services**

**Goal Statement** Southeastern will provide a digitization service to libraries and cultural heritage organizations to support their efforts to digitize and safeguard their historical materials.

1. **Intended Result(s)** Members will have access to a coordinated service that includes training in foundational skills to select, digitize, describe and safeguard historical materials.

## **AWARENESS AND ADVOCACY**

**Goal Statement** Southeastern will communicate with regional decision makers and inform members of opportunities to increase public awareness of the value and benefits of libraries and library services.

1. **Intended Result(s)** Council staff and members will have opportunities to be effective library advocates.

**Strategic Goal Statement** Help members anticipate and communicate about changes in policies, platforms, and tools used in their libraries so their organizations can make informed, strategic decisions related to Southeastern services (Digital Archive, New York Heritage, SEAL, etc).

1. **Outcomes**
  - a. Members are prepared for future technology developments, measured by member surveys.
  - b. Members have the capacity to advocate for and implement service tools and platforms, demonstrated by member accounts of their efforts, collected by Southeastern and shared with the membership through communications and related PD/CE opportunities.
2. **Initiatives/actions**
  - a. Monitor developments and educate hospitals that they will have to manage single sign-on authentication and related expenses.
  - b. Empower members to use services that engage with emerging and complex technology (Harvesting from New York Heritage or the Digital Dark Archive).

- c. Identify and create tools, workflows, and documentation to assist members to make decisions and advocate for complex services (e.g. digital preservation; hospital library services).

### **COMMUNICATIONS AMONG MEMBER LIBRARIES AND/OR MEMBER LIBRARY SYSTEMS**

**Goal Statement** Southeastern will provide a coordinated system of communication for members.

1. **Intended Result(s)** Southeastern will disseminate information about Southeastern's services to members.

**Strategic Goal Statement** Review and revise communication methods to expose members to the full range of Southeastern's services.

1. **Outcome** Expanded member engagement with Southeastern's services, demonstrated by communication data and analytics collected by Southeastern annually.
2. **Initiatives/actions**
  - a. Restructure onboarding
  - a. Maintain updated mailing lists
  - b. Refine our use of the website and social media

### **COLLABORATIVE EFFORTS WITH OTHER LIBRARY SYSTEMS**

**Goal Statement** Southeastern will collaborate with other library systems on services that will benefit members.

1. **Intended Result(s)** Members will have opportunities for new and expanded services.

**Goal Statement** Southeastern will take a leadership role with regional and statewide services that benefit members and other libraries and cultural heritage organizations statewide.

1. **Intended Result(s)** Libraries and cultural heritage organizations will have opportunities for new and expanded services.

### **ADDITIONAL STRATEGIC GOALS**

**Strategic Goal Statement** Foster a culture of equity, diversity, and inclusion in libraries and cultural heritage organizations.

1. **Outcome** Reflect the diverse community served by our members.
2. **Initiatives/action**
  - a. Infuse equity, diversity, inclusion, accessibility, and anti-racism best practices into Southeastern programs and operations.

**Strategic Goal Statement** Refine outreach and training activities to increase member capacity and engagement with Southeastern's technology services.

1. **Outcomes**

- a. Increased understanding of the breadth of Southeastern’s technology services, demonstrated through member surveys, including post-onboarding surveys of new staff.
  - b. Increased use of services and added value of membership, demonstrated annually through data collected by Southeastern, and the implementation of the Net Promoter Score (NPS) as a barometer of member satisfaction.
2. **Initiatives/actions**
- a. Restructure the onboarding and training of staff at member organizations so that they know about the technology services supported by Southeastern, which includes the human resources to support use of services (e.g. Dark Archive and SEAL).
  - b. Explore new and different ways to engage members through a combination of modalities: webinars, short videos, or open houses.
  - c. Build capacity among ESLN council staff to support and advocate for Statewide services developed and maintained by Southeastern in order to reduce the training responsibilities of Southeastern staff.

## **BUDGET and REVENUE**

**Strategic Goal Statement** Increase revenue for Southeastern, while recognizing the capacity of the staff to take on more responsibility and the limitations of members to pay for more services.

1. **Outcome** More revenue for Southeastern, while recognizing the limitations of members to pay for services.
2. **Initiatives/actions**
  - a. Increase dues by 2% each year over 5 years. [The current dues schedule is online on page 5: [https://senylrc.org/sites/senylrc.org/files/southeastern\\_criteria\\_benefits\\_fees.pdf](https://senylrc.org/sites/senylrc.org/files/southeastern_criteria_benefits_fees.pdf)].
  - b. Create a fiscally secure electronic resources plan that meets the needs of hospital members and the council.
  - c. Review Southeastern’s services and fees for hospital libraries in an effort to provide services needed by members and also guarantee revenue for the council.
  - d. Research potential grants or additional revenue for the council.