



# Strategic Plan



2005-2010

# NMRLS Strategic Plan: 2005-2010

*Approved by the Executive Board on October 20, 2005*

## **Strategic Planning Committee Members**

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Barbara Brown, Andover Historical Society  
Deborah Froggatt, Danvers Elementary Schools  
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Sharon Gilley, Lucius Beebe Memorial Library, Wakefield  
Maureen Hardin, Amesbury Middle School  
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## Introduction

In September 2004 the Northeast Massachusetts Regional Library System's (NMRLS) Executive Board appointed the Strategic Planning Committee and charged it to create a five-year strategic plan to follow up on NMRLS' initial plan for 2000-2005. Committee members represent NMRLS multitype library membership. The Committee met five times from October 2004 to July 2005. Alan Brickman, an independent consultant, facilitated the meetings, as well as six focus groups and interviews with library leaders. The Committee drafted and finalized this document with input from our consultant and presented it to the membership for comment. The Executive Board approved the Strategic Plan: 2005-2010 on October 20, 2005.

The Executive Board will review progress on the plan quarterly based on a report from the Regional Administrator. The quarterly review provides an opportunity for discussion, determination of additional fact finding needs, revision and additions to implementation plans, target dates, and bench marks. New and revised activities will be included in NMRLS' annual plans of service.

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## About NMRLS

NMRLS is one of six Massachusetts regional library systems. NMRLS was incorporated in 1997 as one of the four regions that originally comprised the Eastern Region, which included only public libraries. In 1997 regional membership was opened to all types of libraries. Funding is provided from state appropriations by the Massachusetts Board of Library Commissioners.

NMRLS' current annual budget is \$1,506,313. Services provided to members in fy2004 were determined to have an estimated retail value of \$11,319,715, or about \$7.60 per dollar of funding.

**Membership** totals 330, with 13 academic libraries, 53 public libraries, 225 school library media centers, and 39 special libraries, in 54 towns with a total population of some 1.2 million.

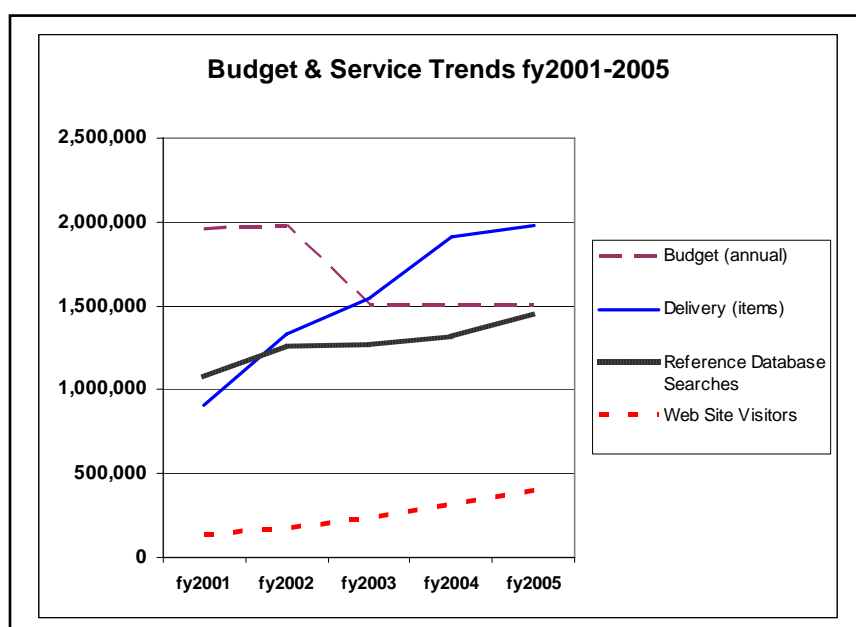
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## Staffing:

Greg Pronevitz, Regional  
Administrator

*Consulting/Training Team*  
Mary Behrle, Assistant Regional  
Administrator  
Susan Babb, Consultant/Trainer  
Scott Kehoe, Consultant/Trainer

*Operations Team*  
Susan Grabski, Operations  
Manager  
Lucie Gallagher, Operations  
Coordinator



**Governance:**

The membership elects Executive Board members at NMRLS’ Annual Council of Members. The bylaws call for a 12-member Board comprised of a minimum of four public librarians, two academic librarians, two school library teachers, two special librarians, and one lay representative.

The **Executive Board** designates committees to advise the region. Current standing committees:

- Board Development
- Budget
- Continuing Education and Advisory Services
- Delivery
- Digital Library
- Legislative Education
- Personnel
- Reference
- Special Libraries
- Supplementary Deposit Collection
- Youth Services

**Service and Resources:**

	fy2001	fy2002	fy2003	fy2004	fy2005
Delivery (items)	906,628	1,330,102	1,546,331	1,912,952	1,974,544
Reference Database Searches	1,071,455	1,255,923	1,266,763	1,315,410	1,452,521
Web Site Visitors	135,049	171,458	228,637	307,239	394,717
Training Attendees	2,052	1,459	1,313	1,175	1224
Members	338	328	335	312	328
Staffing Level	6	7	7	6	6
Budget (Annual)	\$1,958,913	\$1,976,793	\$1,506,313	\$1,506,313	\$1,506,313

**NMRLS Service Areas:**

- Delivery – Delivery of some 2 million items per year among 72 participating libraries
- Reference Services
  - Electronic databases available to all members and patrons at home with 1.5 million uses per year;
  - Regional Reference Center available to all residents and libraries as back up with 500 questions from libraries and 19,000 from residents;
  - Legal Reference Center evening and weekend hours open 19 additional hours per week funded by NMRLS beyond the Library’s normal 42 hours.
- Resource Sharing
  - Mediated interlibrary loan supplements local and regional collections with 5,000-6,000 items requested per year;
  - MassCat statewide shared online catalog and interlibrary loan system for smaller libraries with 18 NMRLS-member participants.

- Continuing Education provides training on library and technology topics with over 100 events annually at various locations and member libraries in the region. Declining attendance was attributed to the budget crisis and members' inability to get away from the workplace for training. NMRLS recent focus on providing training at member library locations reversing this decline.
- Advisory and Technical Assistance provides on-site consulting services to members in areas such as long range planning; planning for technology, personnel, and customer service.
- Supplemental Services
  - Members participate in a statewide purchasing cooperative;
  - Digital library training, consulting, and hosting;
  - Summer reading program;
  - Supplemental collections are available to public libraries in smaller communities.

## **NMRLS Mission**

The Northeast Massachusetts Regional Library System (NMRLS) promotes and facilitates resource sharing, collaboration, and professional development among all types and sizes of libraries and library networks in northeast Massachusetts. NMRLS services, leadership, and advocacy support member libraries and staff to sustain high quality and accessible library services for those who live, work, or study in the region.

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## **NMRLS Vision Statement**

*These are the key elements of an ideal future vision of our organization that guides and informs the development of the major initiatives in the strategic plan as well as the annual plans of service.*

NMRLS creates and facilitates opportunities for collaboration among all types and sizes of libraries in its membership, drawing on individual strengths to enhance shared resources, services, and programs.

NMRLS builds and strengthens its internal organization in ways that foster the growth and development of all member libraries.

NMRLS offers a comprehensive array of services and programs to its member libraries. NMRLS provides leadership in adherence to best practices and professional standards to ensure easy access to the best quality services and programs.

NMRLS Executive Board and its committees, serving as advisors, conduct regular strategic planning activities and periodically assess progress, so that NMRLS may appropriately respond to the evolving information needs of an increasingly diverse community of library users. NMRLS incorporates changing demographic, economic, and social trends into its planning processes. NMRLS keeps pace with technological innovations.

NMRLS collaborates with other regional library systems, networks, and appropriate associations/organizations in ways that are mutually beneficial. NMRLS develops partnerships with community institutions, businesses, and organizations to establish diversified promotion and funding opportunities.

NMRLS develops marketing tools and strategies that may be applied through a variety of avenues.

The combined efforts of NMRLS, its member libraries, and all its allies create a sustainable advocacy network. Advocacy promotes the value of libraries as information providers in a democratic society, resulting in expanded support for libraries at the local, regional, state, and federal level.

## **Strategic Goals and Objectives**

Following are the strategic goals and related objectives for the period, 2005-2010. The short-term objectives will be addressed in the first two years of the planning period. Specific implementation plans, time lines, bench marks and targets will be determined by the Executive Board. Implementation plans are documented separately. At this writing, the medium/long-term goals will be addressed in 2007 and later.

### **Goal 1**

**Inter-library Collaboration:** By 2010, NMRLS will offer and facilitate a wide array of opportunities for collaboration and resource sharing among libraries, particularly across library types.

#### **Short-Term**

Objective 1.A: NMRLS will increase membership and participation of school, special, and academic libraries. (Note: All public libraries in the region are already members.)

Objective 1.B: There will be a significant and growing number of multi-type library collaborations, defined by geography, topic, and/or other affinity.

#### **Medium- and Long-Term**

Objective 1.C: There will be an increased number of Interlibrary Loan (ILL) opportunities between school and public libraries.

Objective 1.D: There will be an increased level of participation in the state-wide virtual catalog.

Objective 1.E: NMRLS will develop and facilitate sustained collaborative collection development activity among clusters of member libraries.

### **Goal 2**

**Delivery Service:** By 2010, NMRLS will refine and continuously improve its system for delivery so that it is reliable, cost-efficient, and provides maximum benefit to library patrons.

#### **Short-Term**

Objective 2.A: NMRLS will establish a Delivery Committee as a vehicle for member and network involvement in the design, implementation, and continuous improvement of delivery services.

#### **Medium- and Long-Term**

Objective 2.B: Member libraries and their branches and/or campuses will have access to a choice of reliable, timely delivery services.

Objective 2.C: A program of financially viable alternative delivery methods and mechanisms will be available to members, e.g., home delivery and next day service.

### **Goal 3**

**Continuing Education:** By 2010, NMRLS will develop and continuously update a comprehensive continuing education and training program that addresses the needs of member libraries, that reflects current standards of excellence in the field, that is optimally accessible to library staff, and that improves the quality of library services throughout the region.

#### **Short-Term**

Objective 3.A: NMRLS will develop and disseminated a set of staff competencies and training standards to serve as a framework for its continuing education program.

Objective 3.B: NMRLS will evaluate member participation in distance and e-learning as part of its continuing education program and expands options and offerings to meet member training needs.

#### **Medium- and Long-Term**

Objective 3.C: NMRLS will provide continuing education related to relevant public policy and advocacy strategies.

Objective 3.D: NMRLS will have an expanded continuing education program related to technology.

Objective 3.E: NMRLS will provide continuing education related to business partnerships, regional development, and marketing for member libraries.

Objective 3.F: NMRLS will provide continuing education on successful models of multi-type library collaboration in communities.

### **Goal 4**

**Reference:** By 2010, NMRLS will provide reference services and resources enabling member libraries to be the premier sources of research and reference services in the region, e.g., online databases and supplementary reference center services.

#### **Short-Term**

Objective 4.A: NMRLS will review and evaluate reference services to ensure quality, efficiency, and cost effectiveness in meeting member needs.

#### **Medium- and Long-Term**

Objective 4.B: NMRLS will collaborate with member libraries and automated networks to facilitate access to reference services.

### **Goal 5**

**Infrastructure:** By 2010, NMRLS will have a more effective and productive operational infrastructure, including expanded staff and Board capacity, and its management and governance structures will represent the highest standards of excellence in the field.

### **Short-Term**

Objective 5.A: The Executive Board and its Committees will receive a high level of administrative and technical support to sustain efficiency of decision making in providing services to NMRLS widely diverse member libraries.

Objective 5.B: NMRLS staff will receive a competitive salary and benefits to encourage excellence in customer service and performance, staff retention, and job satisfaction.

Objective 5.C: NMRLS staff will receive appropriate support and resources to permit the highest levels of customer service to members.

### **Medium- and Long-Term**

Objective 5.D: NMRLS will expand the activities and participation of the Board Development Committee allowing it to become the driving force behind Board recruitment, development, and enhancement.

### **Goal 6**

**Partnerships:** By 2010, NMRLS will develop and sustain partnerships with a wide variety of organizations, institutions, and businesses that will enable NMRLS to expand services and increase buying power in support of member libraries.

### **Short-Term**

Objective 6.A: NMRLS will collaborate with other regional library systems, the state of Massachusetts, and regional networks to reduce the cost of region-wide resources to its members.

Objective 6.B: NMRLS will develop a comprehensive region-wide catalog for cooperative purchasing discounts that goes beyond the current state-wide cooperative purchasing program.

### **Medium- and Long-Term**

Objective 6.C: NMRLS will successfully engage a number of corporate partners that support NMRLS and its member libraries through in-kind donations and discounts on goods and services.

### **Goal 7**

**Funding:** By 2010, NMRLS will establish a diversified funding base that can sustain the growth and development of NMRLS as an effective resource for libraries in the region.

### **Short-Term**

Objective 7.A: NMRLS will secure and continuously increase foundation and corporate grant support and corporate sponsorships as part of its revenue mix to support programs, administration, and infrastructure.

Objective 7.B: NMRLS will successfully secure and continuously increase funding from diverse government sources.

#### **Medium- and Long-Term**

Objective 7.C: NMRLS will have an expanded array of appropriate fee-generating services that create a consistent and growing base of revenue.

#### **Goal 8**

**Marketing and Public Awareness:** By 2010, NMRLS will develop, implement, and continuously update a marketing plan that NMRLS and its member libraries can use to foster awareness and understanding of state, regional, and local library services among diverse constituencies of current and potential library patrons and supporters.

#### **Short-Term**

Objective 8.A: NMRLS will expand its marketing efforts to promote the value of library services.

Objective 8.B: NMRLS will be a visible and well-understood entity in communities in the region on the basis of a comprehensive marketing campaign.

#### **Medium- and Long-Term**

Objective 8.C: NMRLS will have in place productive and sustained relationships with business, business associations, and regional entities that foster awareness and support of libraries and of NMRLS.

Objective 8.D: All NMRLS members will have developed and implemented marketing plans for their libraries with NMRLS assistance.

#### **Goal 9**

**Advocacy:** By 2010, NMRLS will build an advocate network that promotes a strong message about the value of libraries; that has wide participation from library staff, trustees, and patrons in the region; and that is designed to generate support and resources for libraries at the state, regional, and local levels.

#### **Short-Term**

Objective 9.A: NMRLS will have expanded participation and activities of NMRLS Legislative Education Committee.

#### **Medium- and Long-Term**

Objective 9.B: NMRLS member libraries will have a well-developed capacity for advocacy, with continuing education and other support from NMRLS staff.

Objective 9.C: NMRLS will annually develop and disseminate a 12-month calendar of advocacy activities, events, communications, and continuing education opportunities.

## Methodology

Several means of information gathering provided input to the planning process. A separate *Environmental Scan* was published as a snapshot of libraries and the region in 2005. It includes copies of the data gathering instruments. See: [www.nmrls.org/strategicplan2005](http://www.nmrls.org/strategicplan2005).

When surveyed, over 150 NMRLS member library staff clearly considered the provision of online databases, continuing education programs, and delivery service as the Region's three most important services. Two-thirds of respondents favored restoration of online databases as the highest priority, if reinstatement of services becomes fiscally possible. In response to the query, "What challenge in your library keeps you awake at night?," library members were most concerned with staffing and personnel issues, funding, and technology challenges.

Respondents considered NMRLS' top strengths to be its knowledgeable and responsive staff (69 percent), followed closely by access to collections of diverse type libraries (over 65 percent). When asked which future opportunities NMRLS should anticipate for developing new programs and services, nearly 68 percent of respondents see NMRLS providing leadership, information, and support to libraries as they transition to new technologies.

Over 600 library users responded to a "Five Minute Survey." Most respondents visit their library at least once a week. Although responses came from all age groups, 30 percent of the public library patrons were age 40 - 54. Two-thirds of all respondents were female. Forty percent do not use their library's online catalog from home; 44 percent do not use online databases; and only 2 percent of respondents are not satisfied with turnaround time for delivery of interlibrary loan items. When asked how the importance of libraries would change in the future, 47 percent said they would be more important and seven percent of users thought that libraries would become less important. Academic library users had strong praise for their libraries as did parents for public library children's services. Two of the repeated suggestions requested "more library hours" and "wireless Internet access."

A mix of library staff and library leaders participated in six focus groups: frontline library staff, library directors, veteran library staff, library staff involved with delivery service, library staff from libraries serving underserved community groups, and NMRLS staff. Important topics mentioned were databases, technology changes, information literacy, funding, delivery, training, advocacy, and public relations for libraries and for NMRLS.

Our consultant also interviewed a number of library leaders from state and consortial organizations. Their top concerns were funding, remaining abreast of technology, and keeping libraries relevant. An out-of-state regional librarian was concerned with the aging library user base and wondered where the library "niche" will be for younger patrons.

## NMRLS History

In 1960, the legislature authorized the Massachusetts Board of Library Commissioners to establish three regional library systems serving public libraries.

A statewide Strategic Plan for Libraries called for a change from three public library systems to six multitype library systems. The former Eastern Region was to be divided into four smaller regions: Boston, Metrowest, Northeast, and Southeastern. In 1997, in accordance with the strategic plan, the legislature amended the regional statute to permit the creation of six regional library systems to serve all types of libraries in the Commonwealth. All 370 public libraries in the state automatically became members of one of these systems. School libraries, academic libraries, and special libraries also became eligible to apply for membership.

The regional library systems provide direct supplementary services to support libraries. They strive to assist in the development and expansion of library services within the context of a comprehensive statewide program.

Prior to NMRLS' incorporation in 1997, an Interim Planning Committee and subcommittees conducted planning. In its first year the Executive Board created an initial Plan of Service, began participation in a statewide database agreement, made an agreement for bookkeeping and office coordination with an independent contactor, and began regional reference center and interlibrary loan services.

In fy1998, the organization established an office in North Andover, hired the Regional Administrator, launched a newsletter and Web site, expanded database services with newspapers including the Boston Globe and a Spanish language service, hired the first Trainer/Consultant, and initiated NMRLS' training program.

In fy1999, membership grew to 290 members, NMRLS hired a Youth Services Consultant, prepared the first Strategic Plan, relocated the office to a larger space in Danvers, and hired an Administrative Assistant to handle bookkeeping and office coordination.

Membership reached 312 in fy2000. NMRLS added new evening/weekend hours for Legal Library Services and Reference On Call after hours public library reference services.

A staff reorganization led to hiring two added staff to work in training support and database and delivery support in fy2001. Membership reached 338 members and MassCat, a statewide multi-region online catalog for smaller libraries, was launched.

In fy2002, as part of the second phase of staff reorganization, NMRLS hired an Assistant Regional Administrator. Membership declined to 328, NMRLS initiated digital library services, and the Board formed two new committees -- Board Development and Legislative Education.

During a state budget crisis in fy2003, a severe 23.8 percent budget reduction was imposed as membership grew to 335 members. NMRLS was compelled to make cut backs in several service areas including Reference on Call, databases, interlibrary loan, and net lender reimbursement.

In fy2004, the effects of the fiscal crisis continued. Membership declined to 312 members as a result of many school library media centers losing certification due to the lack of a certified library media specialist. A reduction in force reduced staffing by one full-time position and NMRLS further cut database services. As an online replacement for after hours public library reference services NMRLS launched the Answers to Go library patron Web site.