

SHARING AND SHAPING OUR FUTURE:

A Three-Year Strategic Plan for the
Cooperating Libraries of Greater Springfield (CLGS)

FY 2005 – FY 2008

October 1, 2004

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INTRODUCTION

The Cooperating Libraries of Greater Springfield (CLGS) is one of the earliest organizations to create ties between academic and public institutions in Western Massachusetts. In 1961 librarians from four academic institutions: American International College, Bay Path College, Springfield College, and Western New England College, formed a committee and conceived the idea of the *Union List of Periodicals in the College and Special Libraries of Greater Springfield, Massachusetts*. This early alliance produced an ongoing cooperative effort among the contributing libraries to identify and share institutional resources, and it was instrumental in the formation of the group that eventually became CLGS. In 1971 the Cooperating Colleges of Greater Springfield (CCGS) consortium was formed, and by 1982 the libraries of the CCGS institutions, in addition to the Springfield Public Library, Baystate Medical Center, and the Western New England College School of Law, assumed responsibility for revising and publishing the Union List and became known as the Cooperating Libraries of Greater Springfield (*see Appendix A*).

During the past four decades, CLGS has built on and expanded its collaborative efforts that began with the Union List. Still operating under the aegis of the Cooperating Colleges of Greater Springfield, CLGS offers our patrons borrowing privileges to all circulating collections and access to reference services at all member institutions, continued professional development at no charge to member institutions, and consortial purchasing benefits. Today CLGS libraries continue to publish the Union List, which now includes sixteen contributing libraries (*see Appendix B*). A multitype organization, CLGS creates bridges between institutions with individual strengths and different populations: public and academic institutions, state-funded and private institutions, smaller and larger institutions, associate-level degree institutions to doctoral-level degree institutions.

CLGS members face an information and research world marked by challenges such as rapid technological change, changing information formats, changing patterns in learning and information gathering, changing user expectations, and limited budgets. To build on the strengths of our cooperative history, CLGS has decided to develop a strategic plan that will guide us through the next three years in order to help our member libraries become more effective participants in our communities and institutions.

PLANNING METHODOLOGY

The desirability of creating a strategic plan had long been a topic of discussion of the CLGS library directors as they met over the years. The creation of a part-time paid CLGS coordinator position in 2001 freed the group from routine tasks, and the idea of creating a strategic plan became more feasible in 2002. The CLGS library directors formed a strategic plan subcommittee in November of 2003. Members of this subcommittee included May Stack, the President of CLGS and Director of D'Amour Library at Western New England College Library; Andrea Taupier, Director of Babson Library at Springfield College; and Maureen Horak, Director of Hatch Library at Bay Path College.

Subcommittee members spoke with other area librarians who had experience in developing strategic plans and gathered information on the process and the required documentation. The process was informed by documents from the Western Massachusetts Regional Library System (WMRLS) strategic planning effort along with the publication *Strategic Planning for Multitype Library Cooperatives: A Planning*

Process. The subcommittee invited Mary King from WMRLS and Susan Kohler-Gray, an independent management and organizational development consultant, to visit the larger CLGS directors group, outline the planning process, and provide guidance. As a result of this initial meeting, the directors group developed an outline for planning events and hired Susan Kohler-Gray as a consultant.

The following chart outlines the planning process:

November 2003	Strategic plan subcommittee formed
November 2003	Directors group decided on data collection methods
December 2003	Subcommittee met to establish task outlines and timelines
January 2004	Susan Kohler-Gray and Mary King met with directors group
February 2004	Focus group plan and questions developed
March 2004	Data collection process began <ul style="list-style-type: none"> ▪ circulation statistics gathered ▪ focus groups conducted
March 2004	Susan Kohler-Gray drafted written needs assessment from information gathered at focus groups
March 2004	Needs assessment results distributed to directors group
April 2004	SWOT analysis and Strategic Issues defined at special meeting facilitated by Susan Kohler-Gray
April 2004	In several meetings, subcommittee drafted mission, vision, goals, objectives, and action plan; wrote rough draft of three-year plan, including strategic initiatives and implementation plan
May 2004	Draft shared with directors group, Mary King, and library staff for feedback
May 2004	Directors group met to discuss and amend rough draft
July 2004	CLGS directors met to finalize the strategic plan document
September 2004	Final draft of CLGS Strategic Plan submitted to Massachusetts Board of Library Commissioners

NEEDS ASSESSMENT PROCESS

To gather quantitative information on resource sharing among CLGS members, the group compiled 2003 Circulation Statistics from each library (*see Appendix C*). Focus groups, comprised of a broad range of staff from all member libraries, excluding the directors, provided more qualitative information. Focus group participants represented a cross-section of library functions at each meeting. Directors encouraged all staff members to participate, and focus group members may or may not have had previous experience with CLGS through participation in one of its subgroups such as the CLGS Reference, Circulation, or Technical Services groups. The focus groups were designed by the library directors and conducted by Susan Kohler-Gray (*see Appendices D and E for Focus Group Questions & Strategic Input Design*).

Using the data derived from the focus group meetings (*see Appendices F and G*) and circulation statistics, the CLGS directors group developed a SWOT (strengths, weaknesses, opportunities, and threat) analysis and identified member concerns (*Appendices H and I*). This needs analysis was conducted at a special meeting on April 15, 2004, and was facilitated by Susan Kohler-Gray, who also wrote the summary data.

ASSESSMENT OF MEMBER NEEDS

During the planning process the following member needs were identified through the focus groups, SWOT analysis, and member concerns:

- Enhanced resource sharing
- Clear, effective borrowing policies
- Greater visibility of CLGS as a consortium
- Increased marketing and advocacy
- Expanded staff development opportunities
- Opportunities for staff initiatives
- Improved collaboration with IT
- Continued membership of current partners
- Stable financial support

This planning process and needs assessment enabled CLGS to refine its mission statement, develop a vision statement, and articulate goals based on the strategic issues identified. During the next three years CLGS will address these user needs.

MISSION STATEMENT

The Cooperating Libraries of Greater Springfield (CLGS) is committed to sharing resources and information among member institutions. Through CLGS all students, faculty, and Springfield residents have access to the library resources and services of the Cooperating Colleges of Greater Springfield as well as the Springfield Public Library. CLGS expands opportunities for independent study and research, provides added value for our institutions, and creates greater awareness of the importance of libraries.

VISION STATEMENT

The Cooperating Libraries of Greater Springfield will provide expanded access to resources and services in the face of a changing information and research environment. CLGS will focus on promoting life-long learning, improved scholarship, creative exploration, and information literacy. While creating opportunities to build collaboration among various constituencies, CLGS will strive to improve the quality of our member institutions by being essential centers of research and learning on campus and in the community.

GOALS AND OBJECTIVES

GOAL #1. Promote resource sharing among member libraries.

OBJECTIVES

- Investigate alternatives and options for the Union List of Serials.
- Investigate cooperative purchase of databases, other digital resources, and shared equipment.
- Investigate continuing and alternative delivery services.
- Investigate policies related to reciprocal borrowing and collection development.
- Continue to support the role and position of the Coordinator.

GOAL #2. Promote greater visibility for CLGS.

OBJECTIVES

- Publicize unique characteristics of CLGS.
- Ensure administration is aware of the cost benefits of resource sharing among CLGS members.
- Market CLGS to library staffs.
- Advocate to administration and faculty the need for information literacy.

GOAL #3. Provide professional development opportunities.

OBJECTIVES

- Continue and expand collaboration among current staff.
- Support collaborative workshops and guest speakers.

- Encourage new initiatives from staff.
- Investigate alternative modes of professional development delivery.

GOAL #4. Build collaboration with IT.

OBJECTIVES

- Identify commonalities between library and IT missions and cultures.
- Forge personal and professional relationships between colleagues.
- Investigate opportunities for shared collaboration and professional development.

GOAL #5. Pursue appropriate funding to support activities.

OBJECTIVES

- Investigate levels of membership.
- Investigate alternative funding options.

ACTION PLAN AND TIMELINE - FIRST YEAR

July 2005 – June 2006

Goal #1: Promote resource sharing among member libraries.

OBJECTIVES

- Investigate alternatives and options for the continuation of the Union List.
 1. December 2005 – Create a sub-committee to look into alternatives or discontinuance of the Union List in light of work involved, price, and new technology.
- Investigate cooperative purchase of databases, other digital resources, and shared equipment.
 1. June 2006 – Directors and reference staff determine what databases the group needs and investigate their purchase through the CLGS membership.
- Investigate continuing and alternative delivery services.
 1. June 2006 – In collaboration with WMRLS explore delivery system options.
- Investigate policies related to reciprocal borrowing and collection development.
 1. December 2005 – Continue working with the Circulation subgroup to finalize borrowing policies and ask members to look into establishing collaborative collection development policies.

Goal #2: Promote greater visibility for CLGS.

OBJECTIVES:

- Publicize unique characteristics of CLGS.
 1. June 2006 – Continue to support CLGS website to promote visibility.
- Advocate to administration and faculty the need for information literacy and technological support.
 1. June 2006 – Create a CLGS subgroup to advocate for information literacy resources on each member campus and in the community to promote information sharing and collaboration.

Goal #3: Provide professional development opportunities.

OBJECTIVES:

- Continue and expand collaboration among current staffs.
 1. December 2005 – Continue subgroups of CLGS, encourage the participation of staff in the activities of CLGS, and investigate barriers to participation.

Goal #4: Build collaboration with IT.

OBJECTIVES:

- Forge personal and professional relationships between colleagues.
 1. June 2006 – Begin forging relationships between libraries and IT departments by hosting a workshop of interest to both groups.

Goal #5: Pursue appropriate funding to support activities.

OBJECTIVES:

- Investigate levels of membership.
 1. December 2005 – Determine current satisfaction of member institutions by using an online survey

SECOND AND THIRD YEAR POSSIBILITIES

Goal #1: Promote resource sharing among member libraries.

OBJECTIVES:

- Continue to support the role and position of the Coordinator.
 1. Fall 2006 – Re-evaluate responsibilities and number of hours required to maintain effective coordinator.

Goal #2: Promote greater visibility for CLGS.

OBJECTIVES:

- Publicize unique characteristics of CLGS.
 1. Spring 2007 – Members create an advertising campaign to publicize the advantages of membership in CLGS.
- Ensure administration is aware of cost benefits of resource sharing among CLGS members.
 1. Spring 2007 – Create an ad hoc committee to determine the exact monetary advantages of membership in CLGS.

Goal #3: Provide professional development opportunities.

OBJECTIVES:

- Encourage new initiatives from staff.
 1. Fall 2006 – Membership directors solicit input from all members' staff for new ideas for CLGS projects.
- Support collaborative workshops and guest speakers.
 1. Fall 2007 - Support with speakers, funding, and vendor demonstrations the activities of all subgroups.
- Investigate alternative modes of professional development delivery.
 1. Spring 2008 – Look into the usage of videoconferencing on each campus for transmission of speakers, demonstrations, etc.
 2. Spring 2008 – Investigate IT/library retreat.

Goal #4: Build collaboration with IT.

OBJECTIVES:

- Identify commonalities between library and IT missions and cultures.
 1. Fall 2007 – Work with CCGS IT subgroup to identify and coordinate with the IT offices of each institution to enhance service to each library.
- Investigate opportunities for shared collaboration and professional development.
 1. Fall 2005 – Look at IT and library similarities to discover areas that are shared.
 2. Spring 2008 – Continue to create professional development sessions that are relevant to both the library and IT and invite the staff of IT to contribute to these sessions.

Goal #5: Pursue appropriate funding to support activities.

OBJECTIVES:

- Investigate alternative funding options.
 1. Fall 2006 – Investigate funding opportunities through the Western Massachusetts Funding Resource Center or other academic grant resources.
 2. Spring 2008 – Determine just what the role and status of our contributing members is in the CLGS long-range plan.

CONCLUSION

Designed to guide us three years into the future, this strategic plan will require review and re-evaluation as we meet what can be unpredictable challenges. Each year in the spring the directors group will meet to discuss the progress we have made in achieving our goals. We may find it necessary to revise timelines or even amend or replace some of our goals depending on external circumstances. At the end of the three-year period, we will again assess the overall success of the plan and strategize for the years ahead. We hope that the strategic planning process we have just undertaken will be the beginning of a commitment to assess our effectiveness, improve our services, strengthen our cooperative ventures, and expand our vision of what CLGS can be.

APPENDIX A

Cooperating Libraries of Greater Springfield

CURRENT MEMBERS

June 2004

American International College

F. Knowlton Utley, Library and Media Services Director

Bay Path College

Maureen Horak, Director of Library and Information Services

Elms College

Patricia I. Bombardier, Library Director

Holyoke Community College

Judith A. Campbell, Dean of Library Services

Springfield City Library

Emily B. Bader, Library Department Head

Springfield College

Andrea S. Taupier, Library Director

Springfield Technical Community College

Tamson M. Ely, Dean of Library Services

Western New England College

May E. Stack, Library Director

Western New England Law School

Barbara West, Associate Dean of Library and Information Resources

Westfield State College

Brian Hubbard, Interim Library Director

APPENDIX B

Cooperating Libraries of Greater Springfield UNION LIST PARTICIPANTS

June 2004

Baystate Medical Center

Berkshire Community College

Berkshire Medical Center

Chicopee Public Library

Commonwealth of Massachusetts Trial Court - Hampden Law Library

Greenfield Community College Library

Holyoke Hospital

Holyoke Public Library

Mercy Hospital

Noble Hospital

North Adams Regional Hospital

Palmer Public Library

Shriners Hospital for Children

Western Massachusetts Regional Library System

Westfield Athenaeum

Wilbraham Public Library

APPENDIX C

Cooperating Libraries of Greater Springfield
CIRCULATION STATISTICS 2003

American International College	59 loans to CLGS patrons (74 in 2002)
Bay Path College	105 loans to CLGS patrons (104 in 2002)
Holyoke Community College	182 loans to CLGS patrons (147 in 2002)
Our Lady of the Elms College	41 loans to CLGS patrons
Springfield College	Unable to provide statistics
Springfield City Library	Unable to provide statistics
Springfield Technical Community College	77 loans to CLGS-C/W MARS patrons (can only track C/W MARS libraries)
Western New England College	292 loans to CLGS patrons
Western New England – Law	Does not circulate any items
Westfield State College	213 loans to CLGS patrons (136 in 2002)

Total circulation between CLGS libraries in 2003 = 969 items

APPENDIX D

Cooperating Libraries of Greater Springfield Strategic Planning Process 2004

FOCUS GROUP QUESTIONS

- 1) How aware do you think your students and faculty are of CLGS?
- 2) How much do your students and faculty use CLGS services?
- 3) From your perspective, what benefits does CLGS membership provide to your library and its patrons?
- 4) What are your frustrations with CLGS? What is in most need of improvement? Is there anything that CLGS is doing that you think it should not do?
- 5) What additional cooperative efforts of CLGS could improve services to your library and its patrons?
- 6) What type of support from CLGS would assist you in doing your job more effectively?
- 7) What challenges do you see facing your library over the next five years and how might CLGS help you address them?

APPENDIX E

**Cooperating Libraries of Greater Springfield
Strategic Planning Process 2004**

STRATEGIC PLANNING INPUT

Your input will help guide the development of the CLGS strategic plan. Please provide some basic background information and then rate the CLGS activities listed below.

1) Library: (Please check the library where you work)

AIC Shea Memorial Bay Path Hatch Elms Alumnae
 HCC Library SC Babson Springfield City Library
 STCC Library WNEC D'Amour WNEC Law Westfield Ely

2) Your Department or Main Function: _____

3) Please review the following list of CLGS Activities and consider their importance to your library. Circle the number that best reflects your rating, with 1 = Highly valuable, and 5 = Not valuable.

	Highly Valuable				Not Valuable
	1	2	3	4	5
Database Purchasing	1	2	3	4	5
Constituent Group Activities	1	2	3	4	5
Union List	1	2	3	4	5
Vendor Demonstrations	1	2	3	4	5
Group Training	1	2	3	4	5

4) Suggestions for additional activities/services:

5) If CLGS offered more programs or activities for staff of the cooperating libraries, how likely are you to attend:

Highly likely Somewhat likely Unsure Not likely

6) General Comments:

Thank you for your input.

APPENDIX F

**Cooperating Libraries of Greater Springfield
Strategic Planning Process 2004
INPUT SHEET STAFF SURVEY SUMMARY**

1) Library:

AIC Shea Memorial (4)
 Bay Path Hatch (2)
 Elms Alumnae (5)
 HCC Library (0)
 SC Babson (15)
 Springfield City Library (1)
 STCC Library (3)
 WNEC D'Amour (4)
 WNEC Law (0)
 Westfield Ely (5)

2) Your Department or Main Function:

Reference (including some with reference/instruction) (13)
 Technical Services (8)
 Circulation (6)
 Systems (2)
 Administration (2)
 Instruction (1)
 Acquisitions (1)
 Borrower Services (1)

3) Please review the following list of CLGS Activities and **consider their importance** to your library. Circle the number that best reflects your rating, with 1 = Highly valuable, and 5 = Not valuable.

	Highly Valuable				Not Valuable
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
Database Purchasing	18	12	6		
Constituent Group Activities	13	12	9	2	1
Union List	18	16	4	1	
Vendor Demonstrations	2	14	16	5	1
Group Training	11	21	2		4

4) Suggestions for additional activities/services:

- Long term, integrate to one catalog and one patron database (3)
- Group remote/archival storage (3)
- Database Licensing (2)
- Workshops on licensing for databases, e-books, e-journals (2)
- Other group trainings (Circulation, info literacy, technology, how to digitize, serials issues – possibly combining with NASIG)
- More consortia database purchasing
- Transportation between campuses
- Collaboration with other CCGS departments
- Combined Library and IT meetings and speakers
- Easier access to each other's catalogs
- More constituent group meetings/discussions
- Public postings of trainings
- Online tutorials that can be done in own time
- Public relations
- Ariel electronic ILL delivery at all CLGS libraries
- Shared database for mediated searching
- Electronic discussions
- Increased communication
- E-books discussion
- Coordination of campus arts/literary events through CLGS
- ILL activities

5) If CLGS offered more programs or activities for staff of the cooperating libraries, how likely are you to attend:

(18) Highly likely (16) Somewhat likely (3) Unsure (1) Not likely

(Rotate meeting times – 2)

6) General Comments:

- We are extremely under-staffed, can't get away to meetings (2)
- CLGS is invisible to most staff. Some equate it with WMRLS or C/W MARS. Need to capitalize on CLGS distinct niche (2)
- Description of history and services of CLGS is needed (2)
- Develop strong ties and communication among CLGS libraries
- Explore Five College model, but may not work for CLGS
- Ally with WACL and other similar consortia and share ideas
- Exchange of ideas among peers is very beneficial
- Schedule meetings during off/student vacation times
- Lots of good input
- Learned differences facing academic and public libraries
- Enjoyed spending time listening to other librarian's suggestions about facing challenges
- Excellent focus group

APPENDIX G

Cooperating Libraries of Greater Springfield Strategic Planning Process 2004 KEY POINTS FROM FOCUS GROUPS

Awareness/Use of CLGS Services (Questions 1 & 2):

- CLGS is mentioned by staff during Bibliographic Instruction and at the Circulation desk, but most students and faculty are not aware of it beyond knowing they can use the library at other campuses
- CLGS is behind the scenes
- Faculty and students use ILL and databases, but don't know or care where they come from
- Low awareness overall
- Union list is visible
- Those on C/W MARS share more with each other
- Faculty may prefer to use Five Colleges

Benefits of CLGS Membership (Question 3):

- Meetings of constituent groups
- Union list
- Discussion groups help in problem solving
- Reciprocal borrowing/rely on other collections
- Group purchasing
- Being able to search or go to another library
- Students will travel for databases
- Professional Development
- ILL very timely
- Each library has different strengths

Frustrations/Improvements (Question 4):

- Library staff too busy to attend CLGS meetings
- Different policies among the different libraries
- Not on the same catalog
- Need for multiple cards
- No transportation for patrons to other libraries
- Getting books returned
- Lack of clarity about what we really can do cooperatively
- No tracking of reciprocal use

Additional Cooperative Efforts or Support: (Questions 5 & 6):

- One central system/catalog
- Web page with information on CLGS policies, how to use, and with links
- Provide transportation to other libraries
- Get together to talk about database licensing, bring a workshop to the area
- Electronic discussion groups
- Online information to augment meetings
- Have groups and Directors share agendas and notes on the web page
- Database sharing
- Group subscription to World Cat
- Cooperative collection development
- Group meetings for information literacy and library/IT relationship
- Look into the Five College system
- Librarian exchange
- Expand Coordinator hours
- CLGS cooperative events: poetry readings, etc.

Challenges Over the Next Five Years (Question 7):

- Staff reduction and increased workload
- IT/Library interface
- Increased demand for online resources
- Changing media
- Space for archival storage
- Increase in ILL requests
- Changing student needs
- Space for group discussion in the library
- Working together to negotiate on databases
- Educating faculty about online information
- Growing gaps in collections due to budget
- Moving toward the “information commons”
- Forums for discussing future ideas, not just current problems
- Opening databases for remote use
- CLGS help advocate for libraries with college administrations
- Assessing services/accountability
- Remote campuses/distance instruction

Note: Comments are listed roughly in order of prevalence.

APPENDIX H

Cooperating Libraries of Greater Springfield

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • Exist within an academic environment • Long history of shared activities • Staff <i>know</i> each other and work well together • Breadth of collections to fill in for each other • Physically accessible, based geographically – can get there quickly • Forum for sharing ideas, practices and experiences • Union List • Database purchasing • Delivery • Coordinator • Resources sharing/ILL 	<ul style="list-style-type: none"> • Exist within an academic environment • Funding to support projects • Diversity of members is a challenge - public/private, C/W MARS and not beyond academics • Loss of Baystate Medical Center due to cost increase • Not keeping staff – and maybe our administrations - as up to date as they want • Visibility • Helping public understand our role as libraries • Lack of cohesive policies • IT cooperation • Staff release time to attend meetings and programs • Assessment and documentation of what is done • Participation of all members – what controls are possible? 	<ul style="list-style-type: none"> • New, exciting things • Share burden of new user needs - convenience, access, etc. • Library/IT collaboration • Cooperation among schools, colleges and publics • Young librarians with new ideas • Returning student needs • Staff interested in CLGS programs and activities • Online connections for CLGS staff • Expand database purchasing, explore licensing options 	<ul style="list-style-type: none"> • More change to cope with • Financial stability individually and collectively • Space - amount and adaptability impact on collections • Overlapping professional consortia - time for meetings, visibility, resources, etc. • Balancing daily demands and new ideas • IT/Systems limitations • Archives – what to save and how to save

APPENDIX I

Cooperating Libraries of Greater Springfield MEMBER CONCERNS

- Changing face of resource sharing (membership and participation issues)
 - Union list
 - Universal card
 - Databases
 - Shared equipment
 - Coop buying
 - Reciprocal borrowing
 - Delivery
 - Collection development

- Visibility/Advocacy
 - Delineation of CLGS from C/W MARS, WMRLS, etc.
 - To administration (assessment and documentation)
 - To library staff
 - Translating to administrators and faculty the role that CLGS libraries play in preparing patrons for the future through information literacy and information technology literacy

- Funding
 - Need to support Coordinator and Union List
 - Need to maintain membership
 - Increase annual membership fee
 - Concerns about the loss of contributing members to the Union List

- Professional Development
 - Connectivity of staff
 - Support
 - Exciting, new ideas
 - Financial savings of sharing programs
 - Virtual meetings or programs

- Building collaboration with IT Departments
 - IT group is part of CCGS
 - IT and libraries have different cultures
 - Need to forge personal relationships