Libraries of Middlesex Automation Consortium (LMxAC)

Strategic Plan

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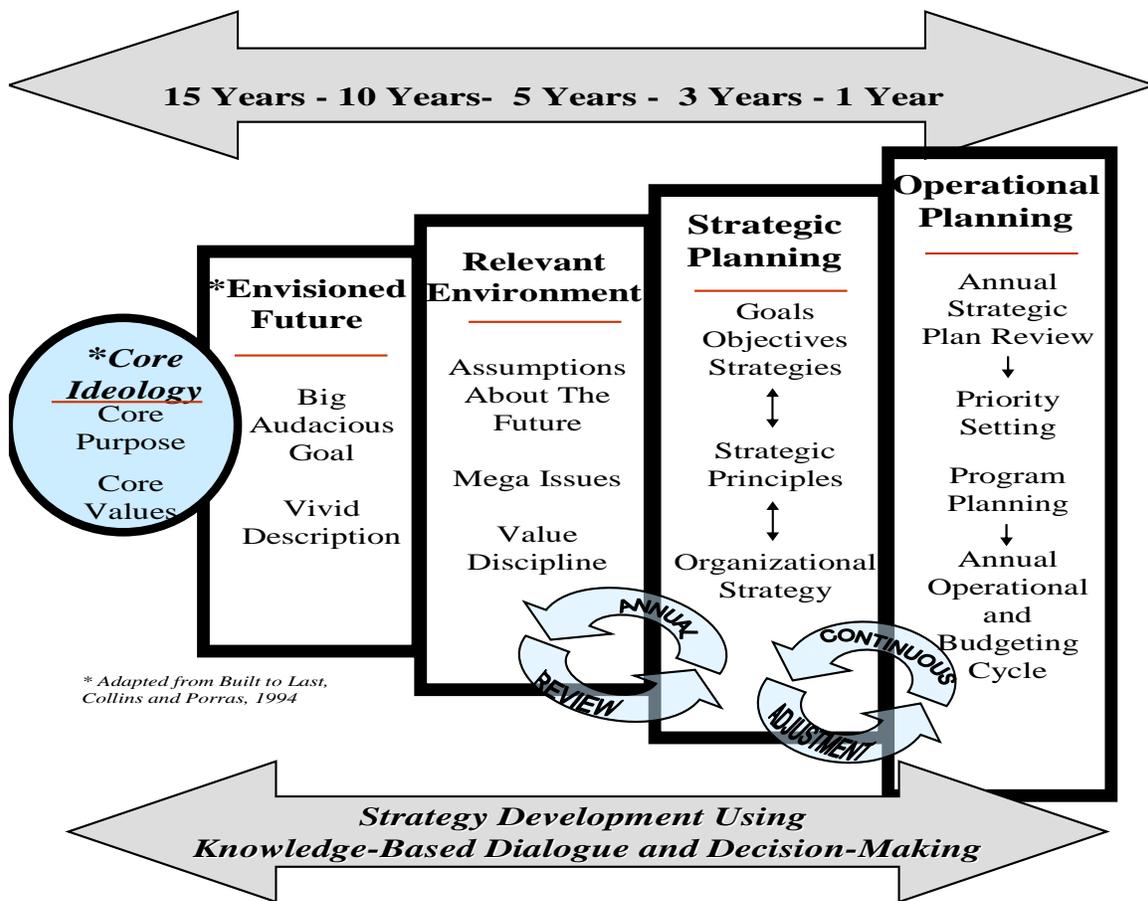
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The Libraries of Middlesex Automation Consortium (LMxAC) engaged in a planning initiative positioned to enhance the organization's future strategic direction. The goal of this initiative was to create clarity and focus on how the organization should invest its valuable resources on the identified wants, preferences, and needs of its members and others. As envisioned, the resulting Strategic Plan will facilitate a) LMxAC's identification of the future needs of its members and other identified stakeholders; and b) LMxAC's options for satisfying those needs.

Below is the strategic planning model used by LMxAC leadership and staff to formulate its strategic plan.

15 Years - 10 Years- 5 Years - 3 Years - 1 Year

Operational Planning

Annual Strategic Plan Review
↓
Priority Setting
↓
Program Planning
↓
Annual Operational and Budgeting Cycle

Strategic Planning

Goals
Objectives
Strategies
↕
Strategic Principles
↕
Organizational Strategy

Relevant Environment

Assumptions About The Future

Mega Issues

Value Discipline

*Envisioned Future

Big Audacious Goal

Vivid Description

*Core Ideology
Core Purpose

Core Values

CONTINUOUS

ANNUAL
REVIEW

ADJUSTMENT

* Adapted from Built to Last, Collins and Porras, 1994

Strategy Development Using Knowledge-Based Dialogue and Decision-Making

Using the *Four Planning Horizon's* model above as a framework and group dialogue and deliberation as the information source, LMxAC leaders created the following:

- A set of assumptions about the future of the profession they represent and the professionals that work within it;

- A list of relevant factors in the long-range horizon (10-15 years into the future), core purpose, core values, *Big Audacious Goal* and a vivid description of future success;

- Three goal areas that identify where LMxAC will direct its energy in the next five years. The goal areas focus on outcomes beneficial to LMxAC and its members.

- A set of strategic objectives in each goal area setting measurable direction for the organization to head in to achieve its goals.

- A set of strategies that identify the actions the organization will undertake in the next 1-3 years in order to achieve each goal area.

Core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. It consists of two elements - *core purpose* – the organization's reason for being – and *core values* – essential and enduring principles that guide an organization. *Envisioned future* conveys a concrete yet unrealized vision for the organization. It consists of a *big audacious goal* – a clear and compelling catalyst that serves as a focal point for effort – and a *vivid description* – vibrant and engaging descriptions of what it will be like to achieve our goal.

CORE IDEOLOGY

Core Purpose:
To advance shared access to materials, information and services.

Core Organizational Values:
- Visionary Leadership open to change and new ideas
- Committed to technological advancement, knowledge, and capabilities to achieve member goals
- Value collaboration and reciprocity
- Committed to strengthening member libraries and service excellence
- Responsive to member needs
- Fiscally responsible
- Value privacy and confidentiality

Envisioned Future

Big Audacious Goal:
To be indispensable as a premier provider of services and resources to libraries in New Jersey.

Vivid Description of the Desired Future:

LMxAC is recognized by its members and others as a focused, innovative, and dynamic organization. The consortium is known in New Jersey as the standard bearer of seamless, secure, and innovative library services. LMxAC members are actively involved in the consortium, they share expertise, and are active participants in consortium decision-making. They work at a high-level of technological functioning, and represent all geographic areas and types of libraries.

The services provided by the consortium include library automation, end-user navigation, consulting, collection analysis, staffing support, state and national advocacy leadership, collection development, literacy programs, and trustee education.

3-5 YEAR PLANNING HORIZON
~ OUTCOME-ORIENTED GOALS, OBJECTIVES,
AND STRATEGIES ~

The following thinking represents goal areas for the next three to five years. They are areas in which LMxAC will explicitly state the conditions or attributes it wants to achieve. These outcome statements define "what will constitute future success." The achievement of each goal will move the organization toward realization of its vision. The goal areas are not in priority order.

Objectives and Strategies provide direction and actions on how the consortium will accomplish its articulated goals. Objectives are considered in the 3-5 year planning horizon while Strategies are considered within the 1-3 year planning horizon. Strategies are reviewed annually by LMxAC leadership

Goals, Objectives and Strategies

Goal Area: Membership

Goal Statement: LMxAC will be a strong organization comprised of committed, diverse, and informed members.

Objective (1):   Expand membership levels.

Objective (2): Increase members' commitment to and understanding of membership responsibilities to the organization and each other (synergy).

Objective (3):   Increase members' knowledge of the value of membership.

Goal Area: Resources

Goal Statement: LMxAC will have the necessary resources to deliver and support the services offered.

Objective (1): Increase revenue generated from investments.

Objective (2): Enhance funding formula to adequately support operations and services.

Objective (3): Maintain cost-effective operations.

Objective (4): Improve physical infrastructure and equipment.

Objective (5): Ensure appropriate staffing levels and expertise.

Objective (6): Maintain an ongoing commitment to strategic planning.

Goal Area: Services

Goal Statement: LMxAC's portfolio of programs and services are flexible and responsive to the changing needs of members.

Objective (1): Increase LMxAC's and its members' understanding of marketplace technology trends and other issues impacting the library environment.

Objective (2): Increase LMxAC's understanding of member's ongoing needs.

Objective (3): Enhance LMxAC's array of services in response to the changing needs of its member and their marketplace.

CONCLUSION

LMxAC's leadership views the process of strategic planning as ongoing within the organization. This is not a "strategic planning project" that is completed. Adoption of a plan is an affirmation of the general intent and direction articulated by the vision, goals, and objectives.

Specifically, the Board commits to:

- Reviewing their external assumptions annually to assess change.
- Reviewing progress toward achieving goals and moving objectives forward on an annual basis.
- Approving strategies recommended by staff and other stakeholder groups in their annual budget and work plans.
- Providing ongoing and open dialogue with the membership on direction and progress toward achieving stated direction.

Specifically, the staff commits to:
- Creating and refining strategies in support of approved goals and objectives.
- Creating action plans with support from appropriate volunteer work groups to accomplish strategies.
- Providing regular reports to the Board on progress toward accomplishing strategies.
- Incorporating the costs required by the strategies in the annual budget to be approved by the Board of Directors.

Appendix A – Strategies

Priority Key:
HH = Current fiscal year
H = Begin in FY'08-'09
M = Begin in FY'08-'09
L = Begin in subsequent year

Goal Area: Membership

Goal Statement: LMxAC will be a strong organization comprised of committed, diverse, and informed members.

    Objective (1):   Expand membership levels.

        Strategies:
- Develop recommendations for a variety of membership levels and the criteria and responsibilities for each level. (H)

    Objective (2): Increase members' commitment to and understanding of membership responsibilities to the organization and each other (synergy).

        Strategies:
- Develop policy and procedures for reciprocal borrowing among member libraries. (HH)

    Objective (3):   Increase members' knowledge of the value of membership.

        Strategies:

- Develop a handbook on LMxAC services, policies and procedures for member libraries. (H)

Goal Area: Resources

Goal Statement: LMxAC will have the necessary resources to deliver and support the services offered.

    Objective (1): Increase revenue generated from investments.

        Strategies:
- Develop and implement an investment action plan. (HH)

Objective (2): Enhance funding formula to adequately support operations and services.

    Strategies:
- Develop and implement a plan to restructure revenue streams. (HH)

Objective (3): Maintain cost-effective operations.

    Strategies:
- Develop a recommendation for office re-location. (HH)

Objective (4): Improve physical infrastructure and equipment.

    Strategies:
- Upgrade office technology and equipment. (H)

Objective (5): Ensure appropriate staffing levels and expertise.

    Strategies:
- Develop a staffing plan to meet service objectives. (HH)

Objective (6): Maintain an ongoing commitment to strategic planning.

    Strategies:
- Create business plans for all services. (HH)
- Create ongoing schedule for strategic plan review. (H)

Goal Area: Services

Goal Statement: LMxAC's portfolio of programs and services are flexible and responsive to the changing needs of members.

Objective (1): Increase LMxAC's and its members' understanding of marketplace technology trends and other issues impacting the library environment.

    Strategies:
- Create Technology Committee. (HH)
- Create a communications strategy to regularly communicate technology trends to association members. (HH)
- Host annual presentation by the NJ State Library Technology staff. (H)
- Consider offering an annual workshop on technology best practices for consortia members. (H)

Objective (2): Increase LMxAC's understanding of member's ongoing needs.

Strategies:
- Solicit member response to strategic plan at annual membership meeting. (HH)
- Create a research agenda to conduct periodic electronic surveys on specific services and needs. (H)
- Create opportunities for members to participate in LMxAC through the website. (M)

Objective (3): Enhance LMxAC's array of services in response to the changing needs of its member and their marketplace.

Strategies:
- Charge the Technology Committee, with staff input, to provide recommendations to the Executive Director on possible new services to offer. (HH)
- Identify opportunities for additional non-technology related services that LMxAC could offer. (H/M)
- Incorporate a library related topic or issue in every general membership meeting. (HH)
- Develop more opportunities for training. (H)

Appendix B – Environmental Scan

In order to make progress against the 10-15 year Envisioned Future, an organization must constantly anticipate the strategic factors likely to affect its ability to succeed, and to assess the implications of those factors. This process of building foresight about the future will help LMxAC to constantly recalibrate its view of the relevant future, a basis upon which to update the strategic plan on an annual basis. As the outcome-oriented goals that will form the basis of the long-range strategic plan will be based on this foresight, annual review of these "Assumptions" will be an appropriate method of determining and ensuring the ongoing relevance of the strategic plan.

Assumptions

BUSINESS AND ECONOMIC FACTORS
- There will continue to be stagnant or declining revenue to libraries in New Jersey.
- The economy will most likely experience a downturn in the next five years.
- The NJ state and municipal financial crisis will continue.
- Business consolidations will increase.
- There will be a boom in small businesses as a result of continued corporate cutbacks.
- The environmental movement will increasingly impact businesses.
- The cost of doing business will continue to rise .

SOCIAL VALUES AND DEMOGRAPHICS
- Older patrons will have increasingly more sophisticated needs and greater expectations.
- There will be a large percentage of library staff retiring within the next 10 years.
- There will be an increase in younger staff members that are more technology savvy and have higher expectations for the availability of technology.
- While technology skills will be highly developed, interpersonal skills may be less so.
- Patrons and communities will continue to be more diverse.
- There will be an increase in non-English speaking users.
- The expectation for access to materials 24/7 will increase.
- Public will continue to value "cutting edge" technology.

TECHNOLOGY AND SCIENCE
- Technology will grow more ubiquitous.
- Open source will make greater inroads into our technology toolbox.

- Google, Amazon, and social networking will grow in importance.
- Library will be viewed as a physical and virtual place.
- Library staff's technology skills will remain highly developed.
- The divide between commodity technology and value-added technology will increase.
- The pace of technology change will continue to increase.
- There will be a tighter integration of technology.
- Information overload will continue along with the public's inability to focus on change.
- Information will be available 24/7.

LEGISLATION AND REGULATION
- Local regulatory control will remain central to decision-making in NJ.
- Challenges to privacy issues will continue.
- Changes to library funding are inevitable.
- Consolidation of services on the municipal level will grow.

COMPETITION AND STRUCTURE
- The State Library will continue to provide more services.
- The State Library will continue to provide technology services to the public that local libraries cannot afford.
- The potential for redundancy of services will impact regions and consortia.
- Competition for public funding will intensify.
- The competition for people's attention and appreciation will grow.

Implications of the Above Assumptions on LMxAC and its Members:
- There will be an even greater need for leadership of public libraries.
- LMxAC will need to be positioned to respond "nimbly" to library technology needs.
- Libraries and LMxAC will be expected to "do more with less."
- There will be a need for greater focus – what should our core offerings be?
- There is increased need for greater member involvement.
- There will be a greater need to deliver services more cost effectively.
- LMxAC will need to play a greater role in the investigation of new technologies and possible implications for library service.