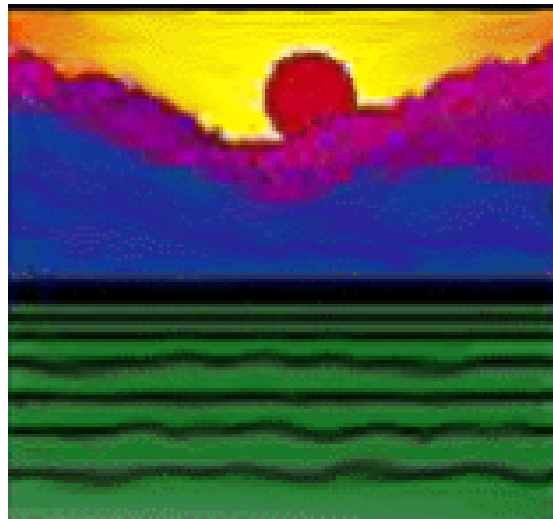


San Joaquin Valley Library System

Long Range Strategic Plan

2003-2006



The San Joaquin Valley Library System assists member libraries to enhance service to their public through cooperation, resource sharing, technology and networking.

~Mission Statement, 1991

Introduction

The San Joaquin Valley Library System enjoys a long tradition of serving the public libraries of California's Central Valley region. Its nine members make use of the System as a vehicle to share ideas and expertise, to test new technologies, and to share the cost of expensive services. Two existing services are at the heart of SJVLS, the San Joaquin Valley Information Service and ValleyCat, the shared library automation system.

Since its inception in 1960, the San Joaquin Valley Information Service (SJVIS) has worked to improve the provision of reference services in member libraries. As a second level reference center SJVIS assists in answering patron questions which, due to time or resource constraints, could not be answered at the local level. A dedicated staff provides training services to member libraries geared toward improving frontline reference skills.

Library automation support through SJVLS began with a shared online catalog and has expanded over the years to include Internet access, website hosting, e-mail services, Internet filtering, print management, group hardware and software license purchases, technical support for workstations, and management of a sophisticated telecommunications network.

Vision and Values

Our Vision: Through the leadership and cooperative efforts of the San Joaquin Valley Library System the public libraries of the Central Valley will provide effective and high-quality services to meet the informational, recreational, self-educational, and cultural needs of users.

Our Values: SJVLS is committed to a group of core values which shape our service priorities. These values are the bedrock on which our long range goals and our daily operations are based.

- ❖ *Quality* service should be available in all locations.
- ❖ *Well* trained staff are essential to quality service.
- ❖ *Sharing* resources improves the service of all libraries, regardless of size.
- ❖ *Libraries* with greater fiscal constraints should not be left behind better funded neighbors in acquisition of technology or services.
- ❖ *Facilitating* patron use of other libraries is important, but so is maintaining each library's individual service identity.

Environmental Considerations

SJVLS service boundaries encompass a large geographic area and range from relatively large urban centers to small, isolated communities. Each member has its own unique library culture which influences its view of service priorities.

In 2000 the creation of the Heartland Regional Library Network introduced a new dimension to SJVLS services. Members of SJVLS became members of the larger Library of California-funded multitype library network and Heartland entered into a contract with SJVLS for provision of selected services to Heartland libraries. SJVLS was no longer primarily serving public libraries. Under the Library of California Act, California Library Services Act funding provided to library systems like SJVLS was to shift to the regional Library of California network. Very preliminary discussions began on the transition of SJVLS functions funded by the CLSA to the Heartland network.

The serious deficits emerging in the California State budget picture for 2003 and beyond have significant implications for Heartland and SJVLS. The future of funding for the Library of California Networks is uncertain and requires retrenchment in SJVLS planned service provision to non-public library members of Heartland. In addition to the loss of revenue from Heartland service contracts, State budget cuts could affect two other key sources of revenue for SJVLS, CLSA system support and reimbursements for resource sharing transactions. The other source of revenue for SJVLS is annual library membership dues. With likely severe budget constraints at the local level and potential cuts in funding to local libraries from the Public Library Foundation, pressure to keep the member library share of System costs low is likely during the period covered by this plan.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- ❖ Dedicated staff, both in the System offices and in member libraries
- ❖ Experience with cooperative efforts
- ❖ Valley identity
- ❖ Past grant writing success
- ❖ Past success in obtaining e-rate funding
- ❖ Existing network structure
- ❖ Library holdings in excess of 3 million volumes

Weaknesses

- ❖ Slowness of bureaucracy impairs ability to respond quickly to opportunities
- ❖ Insufficient system staff levels to support innovation
- ❖ Insufficient library staff levels to support technology
- ❖ Funding disparities between members
- ❖ Shortage of widespread training opportunities
- ❖ Some members are among the most financially challenged public libraries in California.

Opportunities

- ❖ If the Heartland Regional Library Network survives, it provides a structure for expansion of cooperative efforts
- ❖ Potential to contract services at the state level

Threats

- ❖ Difficult economic times statewide may reduced non-member revenue sources
- ❖ Staff reductions at member libraries may impact participation in System governance

Key Issues

Issue 1: Sustaining technology and supporting growth

No aspect of library service remains untouched by technology. In less than a decade the members of the System have moved from limited technology-based offerings based on dumb terminals and CD-ROM databases to the ubiquitous computing of the 21st Century. Software offered to the public is increasingly sophisticated, indexes and documents are accessed via the Web, and staff functions rely on PC-based programs and interoperability with remote computer systems on vendor and governmental networks. The library automation system is both more complex and more flexible, allowing for greater customization, but requiring a greater commitment of staff time for its upkeep. All of these factors require that staff and funding be committed to the maintenance and replacement of hardware, development and configuration of public interfaces to systems, provision of a reliable high-capacity network, and keeping software up-to-date. Planned replacement of hardware, upgrades of software, providing sufficient technical support staff, and predicting and funding network growth all present challenges to members and to the System as a whole.

Issue 2: Maintaining a skilled workforce

SJVLS member libraries serve geographically isolated areas, rely heavily on extra-help employees, often have difficulty recruiting librarians, and serve culturally and linguistically diverse populations. A key to providing quality service regardless of library size or population served is a staff with strong public service, reference, and technical skills. SJVLS should identify ways to overcome obstacles to delivering training presented by understaffed libraries and geographically remote locations.

Issue 3: Growing our shared resources

SJVLS libraries have a rich history of sharing resources ranging from traditional loans of materials to subscriptions to online databases and shared purchase of multiple copies of best sellers. One of the most significant shared resources is the staff and collections of the San Joaquin Valley Information Service. As members face shrinking budgets and frozen positions, the need to leverage the cooperative buying power of the System becomes even greater. A growing trend is the Internet-based delivery of materials, be they full-text journal articles, e-books or MP3 music. These new models of delivery present opportunities for System-wide purchases, but can also present potential barriers to resource sharing when purchased by individual libraries. The System continues to struggle with restrictions on the interloan of non-print media between members.

Issue 4: Responding in a timely manner to new service demands

Although SJVLS has played a major role in allowing its members to adopt new services and technologies, the System is not able to respond quickly to opportunities to improve service. Average time from approval to issue an RFP to implementation is over twelve

months. A method to identify potential new services and get them into a fast-track planning and selection process is needed.

Issue 5: Maintaining a stable funding source and fee structure

Member libraries are likely to face tight budgets and with budget shortfalls also predicted at the state level, revenue from state funding sources (CLSA, Heartland Regional Library Network contracts) is likely to decrease. The gap between the fiscal resources of the better-funded libraries and the poorly-funded libraries has grown wider.

Issue 6: Maintaining quality of core services

SJVLS offers three core services: secondary reference, the integrated online library system, and delivery between system members. Pressures to provide support for new services can dilute the quality and quantity of staff time devoted to the core services. However these core services form the foundation for all other services and must continue to be strong and vital if other services are to be viable.

Actions

Legend for primary type of activity within timeline

P= Planning

I = Implementation

S = Sustaining

R= Review

Issue 1: Sustaining technology and supporting growth

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
1. Provide timely technical support for PCs						
A. Develop local level technical support skills				July 2004		Automation staff/Automation Committee/Libraries
i. Define basic support skills	P		R			Automation staff/Automation Committee
ii. Identify resources to support local skills development	P		R		Yes	Automation staff/Automation Committee
iii. Determine staff level required to support technology in each jurisdiction and ways to meet the identified need	P		R		Yes	Automation staff/libraries/Administrative Council
B. Provide tools to support efficient technical support				Dec. 2004		
i. Implement help desk software	I	S	S			Automation staff/library staff, TrackIt software
ii. Identify and budget for on-going cost of system-wide technical support tools	P	P	I		Yes	Automation staff/Automation committee/Administrative Council
2. Support long-range planning for technology costs						
A. Provide accurate information on hardware and software status				Dec. 2003		
i. Develop hardware database with planned replacement dates	I	S	S			Automation staff/local staff, TrackIt
ii. Provide yearly license summaries to each member for renewal planning	I	S	S			Automation staff, TrackIt

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
B. Accurately predict central site hardware/software costs to stabilize yearly expenses.				Dec. 2003		
i. Identify potential projects needing host servers	I		R		Yes	SJVLS Committees/SJVLS staff
ii. Get replacement of existing servers on staggered cycle	P	I	S			Automation staff
iii. Identify the staff costs to support existing and planned server-based projects	P	P	P			Automation staff
C. Factor on-going technical support costs into grant applications				On-going		
i. Establish System review of all grant applications	I	I	I			Local staff, SJVLS Committees, System staff
3. Provide technology to empower patrons						
A. Provide user interfaces with high usability for novice and experienced users.				June 2005		
i. identify the populations served: children, elderly, Spanish-speaking, visually-impaired, etc.	P		R			Library staff
ii. identify key user interfaces	P		R			SJVLS staff, Library staff
ii. analyze population for key interface issues	P					SJVLS staff, Library staff
iv. create/modify interfaces according to a prioritized list	I	I	I		Yes	SJVLS staff, Library staff, Committees

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
v. develop iPac into an information portal with consolidated searching	I	R			Yes	
B. Support additional remote access to library services				Mar 2006		
i. Review needs of remote users		P				Committees, Library Staff
ii. Identify services needed to support remote users and the cost to implement, set priorities		P				Committees, SJVLS staff
iii. Based on priorities, establish implementation plans		P	I		Yes	Committees, SJVLS Staff, Administrative Council
D. Support effective use of staff through patron self-service.				2005		
i. determine areas of opportunity for self-service	P		R			SJVLS staff, library staff
ii. make a cost/benefit analysis of implementing each self-service program		P				SJVLS staff/library staff
iii. implement programs with immediate cost benefits			I			SJVLS staff, Library staff
iv. Establish plan for acquisition of resources with a longer ROI timeline.			P		Yes	SJVLS staff, Administrative Council
4. Provide technology to support effective use of staff time.						
A. Identify labor-intensive staff functions with potential technology-based solutions	P		R	Mar. 2004		Library staff

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
B. Determine availability and costs of technology –based solutions		P	R	Dec. 2004		SJVLS staff, library staff
C. Identify and prioritize projects		P		Dec. 2004		SJVLS staff, library staff
D. Establish time-line and funding sources for individual projects.		P	I	May 2005		SJLVS staff, Administrative Council
5. Provide fast, secure and reliable network services.						
A. Establish system for annual review of network needs as part of budget preparation process	I			Sept. 2003		Automation staff, library staff
B. Determine options for ongoing support of the network.	P			Oct. 2003		Automation staff
C. Develop a plan for on-going network support.		I		Sept. 2004	Yes	Automation staff, Automation Committee, Administrative Council

Issue 2: Maintaining a skilled workforce

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
1. Develop a broad outline of training needs						
A. Identify staff development needs	P			Oct. 2003	No	SJVLS staff, task force
i. Develop core competencies in areas such as public service, reference, collection development and computing.	P					SJVLS staff, task force
ii. Identify audiences and their barriers to staff development	P					SJVLS staff, task force
iii. Identify continuing education/higher level skill development needs	P					SJVLS staff, task force
B. Identify organizational staff development roles				Dec. 2003	No	SJVLS staff, task force, Administrative Council
i. Identify primary responsibility for meeting staff development needs (individual, local library, SJVLS/local library, SJVLS, SJVLS/other agency)	P					SJVLS staff, task force, Administrative Council
2. Develop coordinated plan to meet staff development needs				June 2004		
A. Designate a staff development team	I					System Staff, Administrative Council
B. Set priorities for items on the outline identified as SJVLS responsibilities	I	R	R			Administrative Council, task force
C. Identify appropriate delivery options for content and audience	P	P			No	System staff, task force

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
i. identify resources needed and those available for assignment/reassignment	P					System staff, library staff, Administrative Council
ii. identify discrete projects suitable for grants		P				System staff, library staff
iii. budget for system costs of new resources required		P			Yes	System staff, Administrative Council
D. Develop multiple modes of communication for staff development opportunities	I			Dec. 2003		System staff, task force
3. Schedule and implement high priority programs						
A. Develop core competencies training				Sep. 2006		
i. Evaluate role of ERP, re-certify trainers if needed	I				Yes	System staff, task force
ii. Update core components of web course	P	I	S			System staff
iii. Develop new internal workshops/courses where needed	P	I	S			System staff, task force
iii. Implement extended delivery options such as web casting, BlackBoard, WebEx		P	I		Yes	System staff with consultant
B. Contract with outside vendors to deliver training where appropriate	I	S	S	June 2004		
i. Coordinate bringing workshops to the SJVLS region, e.g. InfoPeople, OCLC, Amigos	I	S	S		Yes	System staff, library staff
ii. Use computer reserve to purchase on-line training		I	S		Yes	System staff, Administrative Council, Committees

Goal/Objective	Timeline			Target completion Date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
C. Develop cooperative workshop arrangements with interested partners	P	P	I	June 2005		System staff
D. Develop internal mid-priority and specialized training programs			I	Dec. 2005		System staff, task force
E. Develop online registration for SJVLS programs	I			Dec. 2003		System staff
4. Provide fee-based staff development opportunities to non-SJVLS members						
A. Determine interest at the regional and state level in SJVLS services	P		R	June 2004		
i. Identify existing fee-based services (competition)	P					System staff
ii. Identify likely consumers of SJVLS staff development services	P					System staff
B. Establish ability to grant Continuing Education credits		I		Oct. 2004		System staff
C. Offer extended fee-based programs		P	I	Dec. 2005		System staff, library staff
i. Develop online payment acceptance			I		Yes	System staff
5. Develop evaluation program for staff development services				Dec. 2004		
A. Ensure that each staff development program includes an outcomes assessment	P	I	S			System staff
B. Develop annual report of staff development services provided to each jurisdiction	I	S	S			System staff

Issue 3. Growing our shared resources

Goal/Objective	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
1. Increase utilization of joint purchase opportunities						
A. Create a system-wide collection development plan		P	I	June 2006	Yes	Collection Development Committee, Reference Committee, System Staff
i. develop a mechanism to share information on subscription/standing order cuts	I					Collection Development Committee, Reference Committee, System Staff
ii. identify key resources that should be held within the system		I	S			Collection Development Committee, Reference Committee, System Staff
iii. Develop a plan to ensure access to needed resources within SJVLS		P	I		Yes	SJVLS staff, SJVLS Committee/task force, Administrative Council
B. Facilitate joint purchases to achieve cost savings				July 2004		
i. develop a system to quickly facilitate joint purchases of library materials in electronic form for groups of system members.	P	I	R		Yes	SJVLS staff, Library staff
ii. assign responsibility for yearly recommendations on system-wide electronic resource subscriptions		I				Committees
2. Facilitate resource sharing opportunities						
A. Maintain an SJVLS resource sharing guide.				2004		

Goal/Objective	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
i. Maintain an up-to-date description of lending policies system-wide and of individual system members	I		R	Dec. 2003	No	System staff, Circulation Committee
ii. Identify key non-SJVLS resource sharing partners and make accessible information on their policies.		I		June 2004		System staff in cooperation with Heartland and other Regional Networks/CLSA Systems
B. Provide training on effective ILL practices.		I		Mar 2004		System staff, library staff, circulation Committee
C. Acquire and support tools to enhance the resource sharing workflow.					Yes	
i. Coordinate technology used to transmit requests with key lending partners	P	I	I	2006	Yes	System staff, library staff
ii. Determine costs/benefits of hosting resource sharing servers	P			Mar 2004	Yes	System staff
iii. Participate in statewide discussions of resource sharing technology.						System staff, library staff
D. Provide annual reports on costs/benefits of resource sharing for each member.	I	S	S	Dec. 2003		System staff
3. Ensure the quality of the shared bibliographic database				Dec. 2003		
A. Establish guidelines for record import that can be used with any cataloging source	I			Sept. 2003		Cataloging Committee
i. Identify common sources of errors in bib record selection for import	P					Cataloging Committee

Goal/Objective	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
ii. Create a checklist for non-librarian staff to use in record selection	P					Cataloging Committee
iii. Reach agreement on when items should go to a cataloger for record correction and/or enhancement	P					Cataloging Committee
B. Establish standards for being a cataloging center.				Mar. 2004		Cataloging Committee, System staff
i. Create standards for designation as a cataloging center	P,I		R			Cataloging Committee
ii. Initiate a process to periodically review cataloging centers' performance	I	S	S			Cataloging Committee, System Staff
C. Develop a process for maintaining a quality authorities file	I		R	2003	Yes	Cataloging Committee
4. Acquire shared debt collection system				Sept. 2004		
A. Assess interest in shared collection agency	P			Jan. 2004		Administrative Council
B. Implement agreement with collection agency	P,I			Aug. 2004		SJVLS staff
i. Acquire Debt Collect Horizon software module	I				Yes	Administrative Council, SJVLS staff

Issue 4. Responding in a timely manner to new service demands

	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
1. Establish a system to identify potential service needs early						
A. Institute a regular review of System-wide potential needs				Nov. 2003		Committees, System staff
i. Develop a way to encourage discussion within committee of service needs, brainstorming	P					Committees, System staff
ii. Facilitate reports from staff attending conferences on trends in services	P					Committees, Systems staff
B. Identify new service priorities regardless of available funding or method of delivery.	P	P	P	Nov. 2003		Committees, System staff
i. Ensure System staff are knowledgeable about service needs (pre-funding needs assessment)	P,I					Committees, System staff
C. Budget annually for new service planning activities		I	S	July 2004		System staff, Administrative Council
i. Budget for short trips to visit other libraries		I	S		Yes	
ii. Budget for consultants for pre-grant writing tasks		I	S		Yes	
2. Develop small task forces that can fast-track RFP/RFQ preparation.		I	I	Mar. 2003		Administrative Council
3. Identify additional ways to fast-track new product/service acquisitions		P	R	Mar. 2003		System staff

Issue 5. Maintaining a stable funding source and fee structure

Goal/Objective	Timeline			Target completion date	Budget Item	
	03/04	04/05	05/06			
1. Identify core SJVLS services supported by member payments						
A. Specify the level of service SJVLS members would want to maintain even if State funding were not forthcoming	I	R	R	Nov. 2003		Administrative council
i. Identify the base cost of those services and projected annual increases	P					System staff
ii. Create budgets that will not fluctuate radically if external revenue sources are reduced.	P					System staff, Administrative council
2. Identify opportunities for steady revenue from contract/subscription services to persons/institutions beyond SJVLS.	P	I	R	June 2005		
3. Pursue aggressive grant writing for development of new services		P,I	I	Mar. 2004	Yes	System staff, committees
4. As network growth stabilizes, develop plan to manage use of e-rate and CTF discounts.	P	I	R	Nov. 2004		System staff, Administrative Council
A. With discount credit experience, accurately project surplus telecommunications funds	P	I,R	R			
B. Develop way to utilize the discounts without impacting annual member payments to system in the event of a cut in discounts	P	I	R		Yes	System staff, Administrative Council
5. Examine fee-for-service options within SJVLS or tiered services		P,I	S	Sept. 2004	Yes	System staff, Administrative Council
6. Assess SJVLS membership and operating authority				Mar. 2005		

A. Determine interest in changes/expansion of SJVLS participation	P					Administrative Council
B. Appoint a task force to recommend any changes to Joint Powers Agreement		P,I				Administrative Council

Issue 6. Maintaining the quality of core services

Goal/Objective	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
1. Use library automation system to its full potential						
A. Develop expertise in each module, both in libraries and in system office	P,I	S	S	Dec. 2003		System staff, library staff, System committees
i. Establish method of communicating technical tips and best practices to libraries	P,I	R	R			System staff
ii. Assign responsibility for in-depth knowledge of modules	I	R	R	Aug. 2003		System staff
B. Develop expertise in Sybase/SQL	I	S	S	Sept. 2003	Yes	System staff
C. Provide training and support for sophisticated report generation	P,I	S	S	Nov. 2003	Maybe	System staff, library staff
2. Maintain the quality of second level reference service						
A. Provide regular quantitative and qualitative assessments of service	I			Sept. 2003	No	System staff
B. Implement support for virtual reference service				July 2005	Yes	
i. Assess the need for virtual reference service in the SJVLS service area	P	P	R			System staff, member libraries, Reference committee
ii. Construct a cooperative model for virtual reference services in the SJVLS region		P	R			System staff, member libraries, Reference committee
iii. Identify network issues for support of virtual reference		P			Yes	System staff
iv. Make necessary budget and staff adjustments			I		Yes	System staff, Administrative Council
C. Enhance support for database projects	P	I	S	June. 2005		

Goal/Objective	Timeline			Target completion date	Budget Item	Resources/Responsibilities
	03/04	04/05	05/06			
i. Identify supported platform(s) for all database projects – song index, Ben’s almanac, digital image collection, antiques index, etc.	P					System staff
ii. Determine need for common search interfaces to SJVIS and other databases.		P	I		Yes	System staff, Reference Committee
iii. Weed and digitize vertical file materials. (Reducing the vertical file collection is essential to providing growth space for other SJVIS collections.)		P	I		Yes	SJVIS staff
3. Provide delivery services in the best manner possible.						
A. Regularly evaluate the performance of the delivery system	P,I			June 2004		System staff, library staff
B. Explore the cost and benefits of implementing electronic delivery of some materials		P	P		Yes	System staff, Circulation & Reference Committees
C. Evaluate the cost of system-owned van delivery versus alternatives		P		Mar. 2005		System staff
4. Provide a website to support SJVLS functions						
A. Integrate all components of the web site into a cohesive whole which reflects our mission and identity	I			Sept. 2003		System staff
B. Fully develop secure SJVLS Intranet to support system-wide communication	P	I		June 2004		System staff, SJVLS committees