

Tampa Bay Library Consortium

Strategic Plan

2007–2010

Background

TBLC is a nonprofit multi-type library cooperative that assists and empowers libraries of all types, including public, academic, school and special. Established in 1979, the organization is administered by an executive director and is governed by a 13-member board composed of elected representatives from member libraries.

Today, 97 libraries are TBLC members, including six community colleges, three state university system libraries, 27 private academic schools, colleges and universities, four public school systems, and 41 public and 16 special libraries. Together these libraries serve over 4.2 million Floridians, or almost a quarter of Florida's population, in 12 counties in west central Florida (Citrus, Desoto, Hardee, Hernando, Highlands, Hillsborough, Manatee, Okeechobee, Pasco, Pinellas, Polk, and Sarasota).

New Strategic Plan

In March 2007, the TBLC Planning Committee, chaired by Linda Gillon, began work on a new strategic plan to guide its development through 2010. Nancy Pike, a past FLA Board President and retired Director of Sarasota County Public Library, facilitated the planning process. During the process, the committee took advantage of 2.0 services including a Planning Wiki, Flickr, and YouTube.

Denise Davis, ALA director of Research and Statistics, and Linda Crowe, executive director of Peninsula Library System – both resource people with expertise related to consortia nationally – made presentations to the committee. Member library staff was invited to focus group sessions held around the region. Following the group sessions, Nancy and the planning committee worked with the information and input collected during the various sessions, identified priorities, and worked with TBLC staff to complete the plan.

Property Tax & Budget Reduction Issues Cast Huge Shadow

As the Planning Committee met, the Florida Legislature was developing its response to problems with the State's ad valorem tax system that funds Florida counties, cities, and special districts, and, through them, public libraries. At the same time, the state government recognized its tax receipts were down, and the Governor put in place 4 percent reductions and asked all state agencies to submit plans for reducing their 2007-08 expenditures by an additional 10 percent. Hopefully the full 10 percent reductions will not be necessary. Thus, it appears that all libraries and library agencies supported by state or local funds, including the Multitype Library Cooperatives like TBLC, will face budget challenges in 2007-08 and likely for at least several years afterward.

The Planning Committee completed providing its input into the planning process on May 4, 2007, and the Legislature approved its tax package on July 15, 2007. The tax plan dramatically changes the environment in which libraries and TBLC operate and will have a huge impact on the ability to plan effectively.

The Legislature approved a two-part approach: first, a 2007-08 tax rollback to 2006-07

levels with additional reductions ranging from 3 percent to 9 percent; second, additional reductions averaging 22 percent statewide, which will only be put into place if voted on by Floridians on January 29, 2008.

Currently, local governments and libraries are developing 2007-08 budgets with almost all public libraries facing reductions. Should the voters approve the additional reductions, library services will be severely cut statewide since counties and cities will have to prioritize *public safety* and *essential services*, which will place the burden of cuts on *quality-of-life services*, including libraries.

TBLC and its member libraries are being affected by the tax reduction and budget reduction issues. TBLC is already engaged in discussions with members about their changing circumstance and things that TBLC can do to help them in these difficult times.

The plan presented here represents what TBLC would like to do, but its first priority will be to help its members respond to the budget challenges. Then it will respond and regroup in the most effective manner possible. The reality will likely be different from the plan.

Hot Issues

The committee identified several big issues during the planning process: Web 2.0, Library 2.0, marketing, trend spotting and innovation, and the ongoing importance of continuing education. Specific areas that participants thought TBLC should develop or respond to included E-Government and succession preparation/training.

The committee determined many roles that the TBLC plays for its members and felt the following four roles were the most important and were best aligned with members’ needs:

- **Marketer and Promoter** – Markets its services, promotes the library brand, particularly electronic services, and helps member libraries develop marketing plans and market their own services.
- **Trend Spotter** – Assists libraries and staff by identifying, analyzing, communicating about, and presenting programs on important issues and trends.
- **Technology Innovator** - Serves as a test bed and evaluator for new technologies and services, leading the way in development of new services and programs to improve the effectiveness of libraries in the region.
- **Advocate** – Supports advocacy, advocates for all types of libraries, and informs members of library and public policy issues.

Planning Committee Members

Linda Gillon, Chair Tampa-Hillsborough County Public Library	Linda Allen Pasco County Library System
Jackie Rose Polk County Schools Library	Rebecca Trammell Stetson University College of Law
Tori Hersh Hernando County Public Library	Tracey Reed Clearwater Public Library System
Sarabeth Kalajian Sarasota County Library System	Bill Foege Polk Community College Library

Mary Brown Pinellas Public Library Cooperative	Gary Albarelli Florida Institute of Phosphate Research
Catherine Lavallée-Welch University of South Florida - Lakeland Campus Library	Joe O'Sullivan Pasco County School Board Media Services
Andrew Breidenbaugh Tampa/Hillsborough Co. Public Library	Chad Mairn St. Petersburg College Library
Ava Ehde Manatee County Public Library	Casey McPhee Largo Public Library
Gladys Roberts Polk County Library Cooperative	Kiersty Cox University of South Florida - School of Library and Information Studies

Nancy Pike, Facilitator

TBLC Board

Gary Albarelli, President Florida Institute of Phosphate Research	Sue Felber – Special (2008) H. Lee Moffitt Cancer Center Library
Linda Allen - Vice-President/President Elect Pasco County Library System	Mary Myers - At-Large (2009) Heartland Library Cooperative
Gladys Roberts - Treasurer Polk County Library Cooperative	Debbie Robinson – Academic (2008) St. Petersburg College Library
Jacqueline Rose - Secretary Polk County Schools Library	Barbara Pickell – Public (2007) Clearwater Public Library System
Linda Gillon, Immediate Past President Tampa/Hillsborough Co. Public Library	Mel Pace - Special (2007) University of South Florida - School of Library and Information Studies
Judy Born -Academic (2009) Manatee Community College Library	Barbara Rooks Hillsborough County Public Schools
Barbara Shiflett - Public (2008) Hernando County Public Library	Bert Weber – SunLine (2008) Oldsmar Public Library

The Plan

Vision

TBLC aspires to help member libraries and the communities they serve enjoy seamless access to the rich spectrum of library and information resources of the region, state, and world.

Mission

To lead and encourage collaboration, resource sharing, staff development, and innovation; to provide state-of-the-art services to members and libraries statewide; and to help member libraries be the best they can be, serve their communities, and compete successfully as providers of information and services.

Roles

As it plans and implements its programs and services, TBLC plays many different roles in relation to its member libraries, their staff, and the wider Florida library and information community. These roles can be characterized as follows:

- **Leader** - Provides leadership for libraries; other consortia, state and local agencies, and community organizations.
- **Collaboration & Cooperation Promoter** – Encourages members to join together in developing and providing collaborative services. Promotes cooperation and resource sharing among all types of libraries to provide open access to the region's rich library resources.
- **Trainer and Educator** - Provides state-of-the-art training and education to develop skilled library staff.
- **Facilitator and Catalyst** - Serves as a forum and facilitator for the exchange of ideas, linking people, information, and technology.
- **Trend Spotter** – Assists libraries and staff by identifying, analyzing, communicating about, and presenting programs on important issues and trends.
- **Technology Innovator** - Serves as a test bed and evaluator for new technologies and services, leading the way in development of new services and programs to improve the effectiveness of libraries in the region.
- **Marketer and Promoter** – Markets its services, promotes the library brand, particularly electronic services, and helps member libraries develop marketing plans and market their own services.
- **Consultant** – Provides consulting in areas where it has expertise and helps identify appropriate qualified consultants for other areas.
- **Trusted Agent** – Assists libraries with licensing, group discounts and purchasing library resources, technology, and other products and services.
- **Best Practices Model** - Models best practices in innovative services, planning, use of technology, collaboration, and teamwork.
- **Advocate** – Supports advocacy, advocates for all types of libraries, and informs members of library and public policy issues.

Values

TBLC members believe in:

- Cooperation and sharing resources among all libraries.
- Working together to develop collaborative approaches to needs and opportunities.
- Continuous learning for staff and the communities that they serve.

TBLC staff believes in:

- Serving and caring for all types of libraries and their needs while focusing on the common priority needs of members.
- Seeing that members receive expert, timely, courteous service with a personal touch and a “can do” attitude.
- Continuous learning for staff and the communities that they serve.
- Working in a supportive team environment that maintains a sense of humor and enables an individual’s sense of accomplishment.

THE PLAN

Strategic Directions, Strategies & Activities

STRATEGIC DIRECTION 1	
MEMBERSHIP	
TBLC is a member-driven organization that provides leadership and an environment for its members that fosters innovation and service excellence.	
<i>Strategies & Activities</i>	<i>Measures or Indicators of Success</i>
<p>1. Strategy: Continue as a member-driven organization. This includes continued development of member governing board, careful listening to needs and ideas of member libraries and their staff, responsive program planning, and retention of existing members and recruitment of more school and special library members.</p>	<p>Member satisfaction as indicated by the annual Member Satisfaction Survey</p>
<p>Activity: Recruit more members, particularly school and special libraries.</p>	<p>Increase membership over the 97 in 2007</p>
<p>Activity: Conduct regular visits to member libraries.</p>	<p>Contact or visit at least 35 libraries each year</p>
<p>2. Strategy: Bring together member library staff and facilitate groups with shared interests and specialties.</p>	<ul style="list-style-type: none"> • Member satisfaction as indicated by the annual Member Satisfaction Survey • As confirmed by the annual Membership & Customer Relations Report
<p>Activity: Maintain the “Library Finder” member contact database; keep it current and available on the Web. Include more descriptive information about libraries, e.g. library automation, special staff skills, etc. Allow members to provide additional information about their organizations. Make all of the content searchable.</p>	<p>Database is current, available on Web, descriptive, and searchable.</p>

Activity: Support the Special Interest Groups (SIGs).	SIGs are active, meeting at least twice annually
Activity: Identify and communicate with staff sharing common interests and specialties.	As confirmed by the annual Membership & Customer Relations Report
Activity: Identify, reach out to, and bring together staff members who are new to libraries in our area.	Ask administrators to identify new staff and add them to People Finder and e-mail lists
STRATEGIC DIRECTION 2 PROGRAMS AND SERVICES TBLC continuously seeks knowledge of best practices and innovations in technology and services so that it can provide the best available programs and services to its member libraries.	
<i>Strategies & Activities</i>	<i>Measures or Indicators of Success</i>
1. Strategy: iBorrow - Provide libraries with a robust shared catalog and cost-effective user-initiated interlibrary loan service.	<ul style="list-style-type: none"> • Increase over the 46,900 requests filled in 2005-06 • Member satisfaction as indicated by the annual Member Satisfaction Survey
Activity: Migrate to URSA 4.	Successful migration
Activity: Partner with other MLCs to expand URSA to additional libraries.	Increase over the 45 libraries participating in 2005-06
Activity: Add an additional system administrator position to support iBorrow expansion (2007-08 – LSTA)	System administrator is hired
Activity: Monitor the library technology market and assess new resource sharing products.	Confirm accomplishment
2. Strategy: Interlibrary Loan - Facilitate interlibrary loan among all types of libraries.	Increase over the 84,303 ILLs provided and 81,636 received by members in 2005-06
Activity: Inform members about OCLC services.	Confirm accomplishment
Activity: Conduct a Statewide Resource Sharing and Interlibrary Loan workshop.	A minimum of 50 persons will attend and evaluations from 80% will indicate the event exceeded expectations
Activity: Support Group Access libraries, provide ILL	Host at least two

training, consultation, and support.	training workshops annually and contact participants regularly to ensure they are receiving proper support and training
3. Strategy: Florida Library Ground Delivery Service – Provide Florida libraries with a cost-effective delivery system to support Interlibrary Loan and other forms of resource sharing.	Increase over the 225 participants, 43,160 stops, and 329,173 packages moved in 2005-06
4. Strategy: Training & CE – Provide programs of training and continuing education to ensure that members' staffs provide the best service possible.	Increase over the 2,619 participants in 2005-06
Activity: Identify member CE interests and needs, and plan and conduct workshops to address them.	<ul style="list-style-type: none"> • Assess annual CE needs • Workshop evaluations
Activity: Provide a state-of-the-art training lab to meet member staff technology learning needs.	Equipment and software are current and functioning well
Activity: Provide training for each TBLC program and service.	<ul style="list-style-type: none"> • Confirm accomplishment • Training evaluations
Activity: Conduct training in satellite locations and individual libraries.	<ul style="list-style-type: none"> • Increase in number of sessions conducted at satellite locations and individual libraries
Activity: Use alternative methods for providing CE to members, including Web-based training, Web conferencing, and webcasts.	Confirm accomplishment
5. Strategy: Ask a Librarian – Partner with the College Center for Library Automation (CCLA) in providing <i>Ask a Librarian</i> , a statewide virtual reference service and component of the Florida Electronic Library.	As set forth in LSTA proposal
Activity: Push the Ask a Librarian vendor to develop IM functionality for the virtual reference product.	Have instant messaging and/or text messaging up and running by end of 2007-08
6. Strategy: Group Purchase - Coordinate group purchase of databases, electronic information, and other products.	<ul style="list-style-type: none"> • Increase over OverDrive's 1,110 books, 661 music titles and 500+ uses monthly in 2006-07 • Increase over the 31 libraries participating in

	<p>Group Purchase in 2006-07</p> <ul style="list-style-type: none"> • Increase over the nine products purchased through Group Purchase in 2006-07
<p>7. Strategy: Legacy - Cultural Heritage & Digitization - Provide this program to assist local libraries, communities, and organizations in developing digital resources and making them available on the Web.</p>	<ul style="list-style-type: none"> • Increase over the 15 participating libraries • Increase over the 5,946 images and 57,502 records created • Increase over the approximately 900 visits to the site per month • Member satisfaction as determined by the annual Member Satisfaction Survey
<p>Activity: Provide training in imaging and creating metadata records to Legacy participants</p>	<p>Contact each participant to confirm that adequate training and support are provided</p>
<p>Activity: Consider a project that would digitize and catalog small newspapers, or runs of newspapers.</p>	<p>Confirm accomplishment</p>
<p>Activity: Consider developing an NEH or IMLS grant to digitize additional collections.</p>	<p>Confirm accomplishment</p>
<p>8. Strategy: SunLine - Provide a shared library automation system for participating public, academic, and special libraries.</p>	<p>SunLine member satisfaction</p>
<p>Activity: Recruit new SunLine members.</p>	<p>Increase over the eight SunLine members in 2006-07</p>
<p>Activity: Add new SunLine services and functionality</p>	<p>Have several new services and functionalities in place by September 30, 2008</p>
<p>9. Strategy: Bibliographic Services – Ensure that member libraries' collections are well cataloged, loaded in the Florida Database (OCLC), and available for sharing.</p>	<ul style="list-style-type: none"> • Maintain participation at approximately 65 libraries, the 2006-07 level • Continue to add approximately 225,000 records, the 2006-07 level
<p>Activity: Manage batchloading of holdings to OCLC for</p>	<ul style="list-style-type: none"> • Maintain

selective users.	<p>participation at approximately 38 libraries, the 2006-07 level</p> <ul style="list-style-type: none"> Continue to add approximately 193,000, the 2006-07 level
<p>Activity: Facilitate purchase of CatExpress that provides libraries with MARC records and addition of holdings to OCLC, and provide administrative and technical support.</p>	<ul style="list-style-type: none"> Maintain participation at approximately 32 libraries, the 2006-07 level Continue to add approximately 25,000 records, the 2006-07 level
<p>Activity: Catalog materials not matched from OCLC batch loading and add original records to OCLC.</p>	<ul style="list-style-type: none"> Maintain participation at approximately 38 libraries, the 2006-07 level Continue to add approximately 5,000 records, the 2006-07 level
<p>Activity: Identify special collections requiring assistance and seek grant support to catalog them.</p>	<ul style="list-style-type: none"> Maintain participation at approximately 3 libraries, the 2006-07 level Continue to add approximately 1,000 records, the 2006-07 level
<p>Activity: Provide cataloging and metadata consultation to member libraries.</p>	<ul style="list-style-type: none"> Provide approximately 3 consultations per week, the 2006-07 level
<p>Activity: Provide metadata training.</p>	<ul style="list-style-type: none"> Provide 3 training sessions with approximately 30 participants each
<p>10. Strategy: Reciprocal Borrowing - Support, manage, and expand a formal program of reciprocal borrowing among all types of libraries.</p>	<ul style="list-style-type: none"> Increase over the 49 libraries participating in 2005-06 Increase over the 232,987 registered borrowers in 2005-06

	<ul style="list-style-type: none"> • Increase over the 530,248 circulations in 2005-06 • Member satisfaction as indicated by the annual Member Satisfaction Survey
Activity: Explore merging TBLC's reciprocal borrowing program with those of other MLCs.	Confirm accomplishment
11. Strategy: Explore and make available new and emerging technologies such as open source and federated search products.	Confirm accomplishment
12. Strategy: Network Services - Provide Internet and network services, Web hosting, e-mail and e-mail lists.	<ul style="list-style-type: none"> • Increase in the eight libraries using network services in 2006-07 • Member satisfaction as indicated by the annual Member Satisfaction Survey
Activity: Provide network-based services like public wireless access, and Internet filtering, and support workstation management.	<ul style="list-style-type: none"> • Continue these services • Member satisfaction as indicated by the annual Member Satisfaction Survey
Activity: Provide, continuously monitor and update a robust, secure network.	<ul style="list-style-type: none"> • Ensure participating library satisfaction
Activity: Provide Web development support and consulting.	<ul style="list-style-type: none"> • Increase number of participating libraries • Ensure participating library satisfaction
STRATEGIC DIRECTION 3 COLLABORATION TBLC facilitates collaboration and encourages cooperation among libraries, schools, government agencies, businesses, and community organizations.	
<i>Strategies & Activities</i>	<i>Measures or Indicators of Success</i>
1. Strategy: Collaborate with Florida's five other multi-type library cooperatives, the State Library of Florida, state and local agencies, and community groups to work toward shared interests and purposes.	Confirm accomplishment

2. Strategy: Help member libraries develop and maintain collaboration and partnership skills to build strong relationships with organizations in their communities.	Confirm accomplishment
Activity: Conduct training in collaboration and partnership building that results in effective relationships.	Confirm accomplishment
3. Strategy: Help libraries cooperate and build collaborative relationships with other libraries in the region, particularly through other library organizations like TABAMLIN and Sunshine Information Specialists, and among school and public libraries.	Confirm accomplishment
4. Strategy: Provide responsive expert assistance and make referrals to member staff with expertise who is willing to share it. Provide consulting in areas where we have expertise and help identify appropriate qualified consultants for other areas.	<ul style="list-style-type: none"> • Member feedback • Member satisfaction survey
<p>STRATEGIC DIRECTION 4 MARKETING AND ADVOCACY TBLC markets libraries generally, ensuring that the public is aware of library services and value of libraries, and promotes the library brand. It creates an environment conducive to marketing and promotion of libraries. It provides training and support for local marketing efforts. TBLC supports advocacy by its members and advocates for libraries of all types.</p>	
<i>Strategies & Activities</i>	<i>Measures or Indicators of Success</i>
1. Strategy: Communicate to member libraries, the state and national library communities, local decision makers and community at large about TBLC services and the benefits provided.	Confirm accomplishment
Activity: Publish a quarterly newsletter, workshop schedule, and annual report.	Confirm accomplishment
Activity: Utilize the Web site for communicating with members.	Confirm accomplishment
2. Strategy: Develop an approach to help libraries measure and assess services and communicate the value of their services to their communities.	Confirm accomplishment
3. Strategy: Help libraries advocate for library funding and public policy issues.	Confirm accomplishment
Activity: Conduct programs on key issues.	Confirm accomplishment
Activity: Support advocacy efforts and advocates for all types of libraries.	Confirm accomplishment

Activity: Explore establishment of a regional foundation or similarly position TBLC to apply for and receive funding or grants to benefit its services and those of its members.	Confirm accomplishment
4. Strategy: Incorporate and model Web 2.0 and Library 2.0 technologies and services in every aspect of TBLC activity.	Confirm accomplishment
5. Strategy: Market and promote TBLC services, those of its members, and library services generally.	Confirm accomplishment
Activity: Help member libraries develop and implement marketing plans.	Confirm accomplishment
Activity: Promote libraries and the library brand.	Confirm accomplishment
STRATEGIC DIRECTION 5 ORGANIZATIONAL HEALTH TBLC is a healthy, effective organization that models good practices, and effectively manages members' resources.	
<i>Strategies & Activities</i>	<i>Measures or Indicators of Success</i>
1. Strategy: Evaluate the programs and services TBLC provides to help maintain high quality, timely services that are well aligned with member needs.	Confirm accomplishment
Activity: Determine and publicize Return on Investment (ROI) of TBLC member services.	Confirm accomplishment
2. Strategy: Support TBLC staff needs for training and development.	Participation in an optimum of three off-site events annually
3. Strategy: Provide a positive work environment where staff can thrive, grow, and excel.	Staff feedback
4. Strategy: Explore and model creative organizational models and staffing patterns.	Confirm accomplishment
5. Strategy: Provide adequate facilities and technology to support member needs and TBLC services.	Ongoing monitoring and assessment