

# CLRC PLAN OF SERVICE, FY 2016-2021

- **Resource Sharing (Cooperative Collection Development, ILS, Delivery, ILL, Other)**

<b>Goal 1.</b> CLRC will assist/facilitate academic member libraries with developing diverse, complementary collections to serve the pedagogical and research needs of Central New York students, faculty, and researchers.		<b>Priority: academic non-fiction collection development/CCDA</b>
<b>Activities</b>	<p>Years 1-5: CLRC will promote participation in CCDA among member libraries and ensure that eligible libraries continue to submit collection development information through Bibliostat (continuing activity).</p> <p>Years 1-5: CLRC will convene an annual meeting of CCDA managers to discuss member needs and effective/best use of regional funding. (new activity, once/year which should be convened prior to the opening of the Bibliostat reporting). Additional needs assessment activity may be undertaken as a result of meeting activities.</p> <p>Years 1-5: CLRC will make CCDA participation information available on its website (inc. collection development areas).</p>	
	<b>Intended Results</b>	<b>Evaluation/Assessment Method</b>
	Eligible libraries will be aware of and participate in the NY State Cooperative Collection Development Aid program.	<ul style="list-style-type: none"> <li>- compare number of eligible libraries to participating libraries and track the trajectory of this (annually)</li> <li>- funds usage - qualitative survey (biannual)</li> <li>- track number of titles in each institution's subject field (Bibliostat data)</li> </ul>
	CNY library users will have comprehensive, rapid access to in-depth subject materials in identified areas.	<ul style="list-style-type: none"> <li>- borrowing/ILL statistics (Bibliostat data)</li> </ul>
	<b>Operations/Planning Notes:</b>	Resource Sharing Coordinator will continue to manage CCDA reporting activities; Executive Director will convene meetings with CCDA managers to discuss needs and work on program assessment activities.

<b>Goal 2.</b> CLRC will facilitate cost-effective methods for delivery of library resources among members.		<b>Priority: delivery services</b>
<b>Activities</b>	<p>Years 1-5: CLRC will continue to subsidize UPS Campus Ship Delivery Services for regional delivery. (ongoing activity).</p> <p>Years 1-5: CLRC will provide access to UPS Campus Ship Delivery Services for non-regional delivery (members using this will be charged back, but CLRC will manage the billing).</p> <p>Years 1-5: CLRC will manage billing and access to statewide delivery services and extended regional delivery services through extended options for Empire Library Delivery.</p> <p>Years 1-5: CLRC will maintain DOCLINE membership and EFTS to facilitate timely, cost-efficient electronic delivery of medical information documents.</p>	
	<b>Intended Results</b>	<b>Evaluation/Assessment Method</b>
	Physical library materials are delivered efficiently and cost-effectively. Regional end users will have timely access to both digital and physical materials accessed through the various resources made available to CLRC members.	<ul style="list-style-type: none"> <li>- # of shipments;</li> <li>- ILL turnaround time statistics;</li> <li>- participants in ELD</li> </ul>

			- member self-reports
		All CLRC members have access to shared delivery mechanisms or postal subsidies regardless of volume or location within the region. Financial support for delivery to CLRC members not included in the delivery routes will be available.	- member self-reports; - # of shipments; - cost comparisons to UPS, USPS, and FedEx - qualitative survey (biannual)
	<b>Operations/Planning Notes:</b>	Resource Sharing Coordinator will track UPS Campus Ship and maintain DOCLINE and EFTS. Executive Director will work with accounting and ESLN to maintain delivery system relationships and participation.	

<b>Goal 3. CLRC will support members' ILL needs and activity, including but not limited to: contracted ILL service for member organizations and assistance with the use of resource sharing and delivery mechanisms.</b>		<b>Priority: ILL</b>	
<b>Activities</b>	<p>Years 1- 5: CLRC will facilitate member ILL borrowing requests on a fee-for-service basis.</p> <p>Years 1-5: CLRC will lend materials from the professional collection at no charge (per LVIS agreement and member benefits).</p> <p>Years 1- 5: CLRC will plan/facilitate an annual workshop which focuses on ILL and resource sharing.</p> <p>Years 1-5: CLRC will train member library staff in the use of OCLC and DOCLINE resource sharing tools, upon request.</p> <p>Years 1-5: CLRC will advise and troubleshoot with members on WorldShare, WorldCat Discovery and DOCLINE questions, problems, etc.</p> <p>Years 1-5: CLRC will maintain a consortially managed subscription to WorldShare and WorldCat Discovery Services.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC member libraries will have the knowledge and training needed to make effective use of OCLC's WorldCat Discovery or other electronic resource sharing systems.	- continuing education offerings; - training attendance
		CLRC member libraries will be able to fill most ILL requests submitted by their users. [minor rewording]	- ILL statistics
		CLRC libraries will have access to needed medical information through participation in the MISP program, administered through CLRC.	- # of loans funded by MISP; - # of electronic resources subsidized through MISP
	<b>Operations/Planning Notes:</b>	Resource Sharing Coordinator is responsible for maintenance agreements that allow her to execute the above-defined activities. Executive Director manages/approves OCLC subscriptions to support activities. Any professional development will be coordinated with R&D Librarian.	

<b>Goal 4. CLRC will update member holdings records in OCLC.</b>	<b>Priority: holdings records updated in WorldCat</b>
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<b>Activities</b>	<p>Years 1-5: CLRC will add holdings' records for members on request. (There is a charge for all additions from OCLC, which is passed-through to members).</p> <p>Years 1-5: CLRC will delete holdings' records for members on request. (There is a credit offered on all deletions from OCLC, this is passed through to members.)</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC member libraries will have their holdings listed in WorldCat and will have access to RBDB funding to support the addition of significant retrospective collections to WorldCat.	<ul style="list-style-type: none"> <li>- # of items listed in WorldCat (for participating organizations);</li> <li>- # of titles (ubiquitous and originally catalogued materials) added through retrospective conversion with RBDB funds;</li> </ul>
		CLRC member libraries' holdings in OCLC will be accurate and current, regardless of library size and type.	<ul style="list-style-type: none"> <li>- # of adds &amp; deletes performed by CLRC staff</li> </ul>
	<b>Operations/Planning Notes:</b>	<p>Members receive monthly OCLC billing statements from CLRC which reflects the charge/credit balance. (Provided by CLRC's accountant).</p> <p>Resource Sharing Coordinator completes add/deletes as requested.</p>	

● **II. Special Client Groups**

<b>Goal 1. The Hospital Library Services Program (HLSP) will support the information needs of regional hospitals.</b>		<b>Priority: HLSP</b>
<b>Activities</b>	<p>Years 1-5: CLRC will continue to provide medical circuit program services to participating hospitals.</p> <p>Years 1-5: CLRC's medical circuit librarian will coordinate communications among all member hospital libraries and convene an annual meeting of representatives from each hospital.</p>	
	<b>Intended Results</b>	<p>Participating circuit program hospitals have the services of a professional librarian and access to current information resources for professional staff and patients.</p> <ul style="list-style-type: none"> <li>- # of participating hospitals;</li> <li>- # of reference questions handled by CLRC's medical circuit librarian;</li> <li>- usage statistics of electronic resources</li> </ul>
		<p>Health sciences librarians will have up-to-date skills and the support they need to make effective use of all types of resources available to them in order to better serve their audience.</p> <ul style="list-style-type: none"> <li>- continuing education offerings;</li> <li>- # of electronic resources supported by HLSP funds (through CLRC);</li> <li>- ILL statistics;</li> <li>- technology purchases</li> </ul>
	<b>Operations/Planning Notes:</b>	Medical Circuit librarian and Executive Director.
<b>Goal 2. The Medical Information Services Program (MISP) will help member libraries meet the medical information needs of patrons.</b>		<b>Priority: MISP</b>

<b>Activities</b>	Years 1-5: CLRC will distribute MISP funds to subsidize subscription database purchases for members. Years 1-5: CLRC will process MISP reimbursements to members requesting medical information. (done in conjunction with document delivery - above).		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC will subsidize access to the health information needed by member libraries, to the extent that CLRC's resources allow.	- ILL statistics; - funding report
		Member hospitals will make increased use of the electronic resources available to them.	- # of electronic resources supported by MISP funds (through CLRC); - usage statistics of electronic resources
	<b>Operations/Planning Notes:</b>	Resource Sharing Coordinator will handle MISP reimbursements, Executive Director manages purchases.	

• **III. Professional Development and Training**

<b>Goal 1. CLRC will provide a variety of general and specific, member-driven educational opportunities for regional library staff.</b>		<b>Priority: Continuing Education Workshops/Classes/Conferences</b>
<b>Activities</b>	Year 1 - 5: CLRC will use member input as well as instructor availability to schedule classes, allowing for members to choose the best time for classes. Years 1-5: CLRC will continue to solicit input for programming from members as well as anticipate programming needs by staying informed on trends and research happening in and around the library community. Years 1: CLRC will undertake a badging effort to track educational progress (in progress). Years 1-5: CLRC will facilitate equipment trials (such as the Google Cardboard trial in 2016) so that members can experiment with innovations in library technology Years 2-5: Additional items may be added based on user needs and feedback.	
	<b>Intended Results</b>	CLRC members who participate in CLRC training opportunities will find classes/workshops/SIGS relevant and useful.
		CLRC members will be exposed to a wide variety of class types (including virtual classes) and subject areas, as a result of member-driven input.
		CLRC events will provide a regional alternative for library workers who are unable to travel to state or national level conferences.
		Members will be exposed to library technology innovation through hands-on experience with equipment.
		<b>Evaluation/Assessment Method</b>
		- qualitative survey (biannual) - feedback surveys after each event; - # of continuing education offerings; - training attendance
		- training attendance
		- # of conference events held; - attendance at mini-conference events; - evaluation forms and anecdotal feedback
		- # of items available for trial; - use of equipment; - member feedback

			- qualitative survey (biannual)
	<b>Operations/Planning Notes:</b>	R & D Librarian will take the lead and ensure a balance is struck that serves the needs of the membership. Additional input from CLRC management and professional staff.	

<b>Goal 2. CLRC will facilitate a variety of member-driven Special Interest Groups, informal discussion groups devoted to specific topics of interest.</b>			<b>Priority: SIGS as professional development</b>
<b>Activities</b>	Years 1- 5: CLRC will facilitate SIG meetings that both anticipate and respond to member needs.		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC members will learn from one another and participate in inquiry-based learning with their peers.	<ul style="list-style-type: none"> <li>- # of groups established;</li> <li>- attendance at SIG meetings and functions</li> <li>- qualitative survey (biannual)</li> </ul>
	<b>Operations/Planning Notes:</b>	Depending on SIG area, these will be managed by different members of CLRC's management and professional staff.	

<b>Goal 3. CLRC will partner with member libraries, library systems and other organizations to provide relevant training to the widest possible audience.</b>			<b>Priority: Continuing Education</b>
<b>Activities</b>	<p>Years 1-5: CLRC will work with member libraries and library systems to plan jointly sponsored professional development programs.</p> <p>Years 1-5: As a member of the Empire State Library Network (ESLN), CLRC will promote and facilitate member access to ESLN professional development opportunities.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Individual member libraries will open training and partner with CLRC to create in-house opportunities that are open to the membership at large.	<ul style="list-style-type: none"> <li>- continuing education offerings;</li> <li>- training attendance;</li> <li>- feedback on training evaluations</li> </ul>
		CLRC will offer coordinated and/or subsidized training with partners at the member systems (SLS and public libraries).	<ul style="list-style-type: none"> <li>- # of classes in each category;</li> <li>- program rating on electronic evaluation forms completed by attendees for each program;</li> <li>- number of participants in classes</li> </ul>
		CLRC members will have access to training opportunities offered by peer-Empire State Library Network (ESLN) systems.	<ul style="list-style-type: none"> <li>- # of co-sponsored workshops</li> <li>- attendance at co-sponsored workshops</li> </ul>
	<b>Operations/Planning Notes:</b>	R & D Librarian will lead these efforts.	

• **IV. Consulting and Development Services**

<b>Goal 1. CLRC will pilot a skill-sharing program for CLRC members.</b>	<b>Priority: Skill Sharing</b>
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<b>Activities</b>	<p>Year 1: CLRC will convene a working group to assess how this expressed need (i.e., effective skill sharing) shall be delivered to the membership as a pilot project..</p> <p>Year 2: CLRC will continue with pilot work and assess impact and effort to define the activities of Years 3-5. This project is subject to change pursuant to member involvement and feedback.</p>		
	<b>Intended Results</b>	CLRC member libraries will be able to call on their area colleagues for assistance in specific areas where their own library lacks expertise.	<p><b>Evaluation/Assessment Method</b></p> <ul style="list-style-type: none"> <li>- # of participants in skill share group</li> <li>- qualitative survey (biannual)</li> </ul>
		Member organizations will have access to a team of colleagues who can provide feedback and make recommendations in specific situations.	<ul style="list-style-type: none"> <li>- qualitative survey (biannual)</li> </ul>
	<b>Operations/Planning Notes:</b> R & D Librarian will lead this effort with a CLRC member-driven special task group. Participant profiles may be used to inform the “quality circles”. (See Section V, Goal 4)		

<b>Goal 2. CLRC will support and encourage regional digital services. (including, but not limited to focus on and/or services relating to: digitization, digital preservation, metadata improvement, web archiving, institutional repositories, etc.)</b>		<b>Priority: Digital Services</b>	
<b>Activities</b>	<p>Years 1-5: CLRC will recruit additional contributors and content for various digital initiatives.</p> <p>CLRC will continue to support member library projects with its member RBDB grant program, promoting special collecting areas as they coincide with various special collecting initiatives, including but not limited to:          Years 1 &amp; 2: Women’s Suffrage Centennial and Erie Canal Bicentennial for a shared Digital Public Library of America (DPLA) exhibit (already underway - materials to be deposited into New York Heritage (NYH) Digital Collections          Years 2-5: TBD based on statewide initiatives and member feedback.          Years 1-5: Ongoing promotion of newspaper digitization via New York State Historic Newspapers (NYSHN)</p> <p>Years 1-5: CLRC will continue to address members’ digital needs through a combination of one-on-one training, workshops, and participation in consortial purchasing opportunities.</p> <p>Year 1: Feedback item: CLRC will convene a special working group to study the needs of CLRC members vis-a-vis institutional repositories.</p> <p>Year 1: CLRC will set up, market, and supervise a digital services center using equipment already owned by the Council. Suggestions for additional equipment (either for regular use or tryout) will be solicited from the membership.</p>		
	<b>Intended Results</b>	Member libraries will receive guidance and training for participation in shared digital projects, including but not limited to: NY Heritage Digital Collections and Empire Archival Discovery Cooperative (Empire ADC). Additional projects may be added as they are piloted/developed.	<p><b>Evaluation/Assessment Method</b></p> <ul style="list-style-type: none"> <li>- # of CLRC members who contribute to digital projects</li> <li>- # of new regional participants;</li> <li>- # of instructional sessions for digital projects</li> <li>- # of site visits or in-house consultations</li> <li>- qualitative survey (biannual)</li> <li>- # of shared regional services with participating members</li> </ul>

		Members will participate in RBDB mini-grant program to add regionally significant digitized materials to various shared digital projects (see Section V, Goal 2).	- # of collections digitized with RBDB funds
		Members will have access to a shared inventory available for in-house use and check-out on a case-by-case basis.	- # of visits to lab - # of items checked out
	<b>Operations/Planning Notes:</b>	Asst. Director will manage digitization efforts, reporting progress with advice and consent of the Library Resources and Services Committee. Digital Collections Librarian will work with member libraries to create digitization templates and workflows appropriate to local efforts. Library Resources and Services Committee oversees the RBDB mini-grant program.	

<b>Goal 3. CLRC will provide ongoing archival consulting services to libraries, archives, and cultural heritage organizations by assessing their needs and developing services to meet those needs.</b>		<b>Priority: Archival Services</b>	
<b>Activities</b>	<p>Years 1-5: CLRC will provide formal site visits to member libraries, archives, and museums which may potentially result in actionable archival development activity, either by staff members, a consultant, or a recommended hire.</p> <p>CLRC will develop a Circuit Archivist pilot program to offer on-site, professional archival assistance to organizations that need short-term or intermittent help but are not in a position to hire a full-time professional archivist.</p> <p>Year 1: Deriving from the Asst. Director's work with the Archives Leadership Institute, CLRC will undertake a comprehensive planning process to implement a sustainable program. Seek grant funding to support (possibly into Year 2). - Note: this is distinguished from services that were traditionally provided through the Documentary Heritage Program. DHP only provided a limited range of consulting. It is unclear when/if/how members will have access to these services.</p> <p>Years 2 &amp; 3: Pilot program. Seek grant funding for support, work with circuit participants to create a sustainable model for this service.</p> <p>Years 4 &amp; 5: Continuation of this program is contingent on sustainability assessments.</p> <p>Years 1-5: CLRC will advise and consult with organizations on grant opportunities available to them to complete various projects at their institution.</p>		
	<b>Intended Results</b>	Members will have a reliable resource for feedback and consulting on management and preservation of their unique local records, manuscripts and/or archival holdings.	- # of consultancies requested; - # of consultancies completed - follow up survey on site visit
		Members will be able to contract with CLRC to manage, organize, describe, and preserve their unique materials according to accepted professional standards, providing heightened exposure to materials.	- # of requests for circuit archivist (after implementation) - # of institutions served; - # of hours devoted to each project
		Archival organizations, museums and cultural heritage organizations will receive and/or benefit from grants and other funding that make it possible for them to carry on their preservation and access activities.	- # of grants received as a result of consulting assistance (member survey)
	<b>Operations/Planning Notes:</b>	CLRC's Assistant Director will take primary responsibility for this task, with assistance from the Digital Collections Librarian.	

• **V. Coordinated Services**

<b>Goal 1. CLRC will provide administrative support in tandem with ESLN peers to facilitate access to coordinated digital services, including but not limited to NY Heritage, NYS Historic Newspapers, Empire ADC, and DPLA.</b>		<b>Priority: Statewide projects.</b>
<b>Activities</b>	<p>Years 1-5: CLRC's Assistant Director will continue to serve as Project Coordinator for New York Heritage Digital Collections, contingent upon adequate funding from ESLN.***</p> <p>Years 1-5: CLRC's Assistant Director will serve as Project Manager for Empire ADC (the new index and repository for New York State Finding Aids).***          Year 1: Training and collection of finding aids (partially supported by IMLS grant through 9/2016).</p> <p>Years 1-5: CLRC will participate in distributed management of these coordinated services.</p>	
	<b>Intended Results</b>	<b>Evaluation/Assessment Method</b>
	Member libraries will place value on participation in shared digital services.	<ul style="list-style-type: none"> <li>- # of new organizations that join based on access to coordinated services;</li> <li>- # of members that cite participation as a key benefit of membership (qualitative assessment)</li> <li>- # of meetings and staff hours devoted to NY Heritage or Empire ADC (in support of regional services; coordination services should be outsourced);</li> <li>- qualitative survey (biannual)</li> </ul>
	Members collections and unique material will be marketed by and through CLRC's participation in coordinated digital services.	<ul style="list-style-type: none"> <li>- Social media statistics for coordinated services activities;</li> <li>- # of newsletter promotions of CLRC collections;</li> <li>- # of local (CLRC) blog and social media promotions of regionally significant materials.</li> </ul>
	<b>Operations/Planning Notes:</b>	*** Funding from ESLN to absorb a portion of the Asst. Director's salary allows CLRC to maximize benefits to members with the hire of a Digital Collections Librarian who will assist in field work and training. At such time as this arrangement ceases to exist, appropriate staffing changes will be implemented to ensure that service to members continues without interruption. <i>Note: it is a benefit to CLRC membership to have the activities of these statewide initiatives focused in Syracuse.</i>

<b>Goal 2. CLRC will allocate a portion of its RBDB funding to award grants to member libraries for projects of interest and benefit to the entire region.</b>		<b>Priority: RBDB grants</b>
<b>Activities</b>	<p>Years 1-5: CLRC will conduct an annual award process coordinated by the Library Resources and Services committee.</p> <p>Years 1-5: CLRC will conduct yearly grant webinars as a part of its member RBDB grant program.</p>	
	<b>Intended Results</b>	<b>Evaluation/Assessment Method</b>
	Member libraries will be able to carry out digitization, retrospective conversion or metadata projects of interest and benefit to the region.	<ul style="list-style-type: none"> <li>- # of grant applications received from member libraries (see also Section I, Goal 4; Section IV, Goal 2);</li> </ul>

			<ul style="list-style-type: none"> <li>- # of RBDB grants that are awarded to member libraries (see also Section I, Goal 4; Section IV, Goal 2);</li> <li>- amount of funds available to be awarded to member libraries;</li> <li>- reports from LRS committee and external review committee when reviewing member applications</li> <li>- reports from grant recipients on how the grant money was spent</li> </ul>
	<b>Operations/Planning Notes:</b>	Overseen by LRS Committee and includes review by an external panel of people outside the CLRC region; managed locally by CLRC ED. Asst. Director will also participate advising members and reviewing applications, especially digitization and metadata material.	

<b>Goal 3: CLRC's virtual reference service will support the reference service needs of its participating member libraries.</b>		<b>Priority: Virtual Reference</b>	
<b>Activities:</b>	Years 1-5: CLRC will continue to facilitate participation in the AskUs 24/7 live chat reference service for member libraries who wish to use the service.		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Member libraries will participate in, and their patrons will benefit from, shared virtual reference services.	<ul style="list-style-type: none"> <li>- # of libraries participating in AskUs 24/7</li> <li>- # of area patrons served</li> </ul>
	<b>Operations/Planning Notes:</b>	Local library participation is managed by the ED; the AskUs 24/7 service is an ESLN service and is managed by WNYLRC.	

<b>Goal 4. CLRC will promote regional sharing of best practices, successful grant applications, advocacy stories, etc. for members to build on and share as needed.</b>		<b>Priority: Coordinating regional peer resources</b>	
<b>Activities</b>	<p><b>Knowledge Base:</b> Year 1: CLRC will convene a working group to create a "knowledge base" (format TBD) for sharing of above-noted activities. Years 2-5: CLRC will continue to actively solicit contributions to the knowledge base.</p> <p><b>Quality circles:</b> Year 1: CLRC will establish a working group to create a mechanism and marketing plan for a "quality circle" program. This will be used primarily to provide peer review of grant and project proposals. A <b>quality circle</b> is a participatory review technique that enlists the help of professional peers in solving problems related to their own jobs. Years 2-5: CLRC will hold quality circles.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Members will have a resource for finding best practices to assist in their planning or implementation of new efforts.	<ul style="list-style-type: none"> <li>- qualitative survey on usefulness of "knowledge base" established by CLRC.</li> </ul>
		Members will get feedback from peers to improve the quality of grant applications, project proposals, or other problem solving efforts.	<ul style="list-style-type: none"> <li>- # of participants in quality circles</li> <li>- qualitative surveys on usefulness of quality circles.</li> </ul>

	<b>Operations/Planning Notes:</b>	Research and Development Librarian takes the lead on development of the knowledge base. Asst. Director will take the lead on the quality circles.
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<b>Goal 5. CLRC will coordinate planning efforts for libraries in the region for participation in events of widespread interest to libraries, such as (but not limited to) the NY State Fair and Human Library events.</b>		<b>Priority: Event coordination</b>
<b>Activities</b>	Years 1-5: CLRC will host and facilitate planning group meetings for library staff interested in planning these events. Years 1-5: CLRC will make logistical arrangements as necessary.	<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Member libraries and staff will find it easy to participate in regional events that might be of interest to libraries.
		The number of area libraries participating in these events will increase.
		Libraries will see participating in these and other events as an increased opportunity for interacting with and raising awareness in their communities.
	<b>Operations/Planning Notes:</b>	Executive Director will take the lead and assign personnel as necessary. Human Library: <a href="http://humanlibrary.org/">http://humanlibrary.org/</a>

<b>Goal 6. CLRC will facilitate group purchasing for resources and supplies where a group discount or consortial rate is available.</b>		<b>Priority: Cooperative Purchasing</b>
<b>Activities</b>	Years 1-5: CLRC will follow up on vendor proposals, attempting to negotiate favorable pricing and facilitating group purchases of supplies and/or services.	<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC member libraries save money on library resources and supplies by taking advantage of group discounts or consortial arrangements negotiated by CLRC.
		<ul style="list-style-type: none"> <li>- # of discount purchase plans in place;</li> <li>- # of libraries purchasing through these plans;</li> <li>- # of libraries participating in consortial arrangements</li> </ul>
	<b>Operations/Planning Notes:</b>	In most cases, this will be overseen by the Research & Development Librarian, with the exception of specified digital and archival services, which are managed by the Asst. Director. Note: This effort tends to focus on the purchasing of services, rather than databases as consortial purchasing traditionally implies.

• **VI. Advocacy**

<b>Goal 1. CLRC will facilitate and support regional advocacy efforts to engage legislators and government leaders on issues such as library legislation and increased library funding measures that have direct impact on member activities.</b>		<b>Priority: Advocacy Efforts</b>
<b>Activities</b>	Years 1-5: CLRC will host events, activities that bring legislators and advocates together (Legislative Breakfasts, Advocacy Bus, others as decided by Legislative Committee). Years 1-5: CLRC Executive Director will schedule regular visits to legislative offices (both independently and as a member of various, non-CLRC delegations).	<b>Evaluation/Assessment Method</b>

	<b>Intended Results</b>	Local, state and federal legislators will be aware and supportive of libraries and the benefits of library support.	<ul style="list-style-type: none"> <li>- feedback from legislators;</li> <li>- # of legislators in attendance at CLRC-sponsored events;</li> <li>- # of legislative office visits (local, regional, national);</li> <li>- # of letters, phone calls and e-mail contacts with legislators.</li> </ul>
		CLRC members will participate in advocacy efforts.	<ul style="list-style-type: none"> <li>- feedback from advocates</li> <li>- # of CLRC-sponsored advocacy activities (such as Advocacy Day Bus, Legislative Breakfasts, etc.)</li> <li>- # of CLRC members participating in advocacy activities.</li> </ul>
	<b>Operations/Planning Notes:</b>	Outreach Coordinator plans most CLRC-sponsored group activities; Executive Director coordinates message and direct outreach to elected officials. Consults with Legislative Committee.	

<b>Goal 2. CLRC will educate members on advocacy efforts and tools available to them.</b>		<b>Priority: Advocacy Education and Outreach</b>
<b>Activities</b>	<p>Years 1-5: CLRC will share information on NYLA efforts as well as hosting classes and other events that educate on advocacy.</p> <p>Years 1-5: CLRC will share information on federal legislative issues affecting libraries.</p>	<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	<p>Staff at member libraries will have an awareness of current legislation and proposals that affect libraries and equip them to take effective action.</p> <ul style="list-style-type: none"> <li>- # of e-mail messages sent out;</li> <li>- # of messages sent through NYLA's advocacy service</li> <li>- qualitative survey (biannual) <ul style="list-style-type: none"> <li>- how things have changed, and</li> <li>- quantitative info (\$\$): how direct advocacy benefitted member libraries.</li> </ul> </li> <li>- # of workshops</li> </ul>
	<b>Operations/Planning Notes:</b>	Executive Director will manage these efforts.

<b>Goal 3. CLRC will seek/facilitate partnerships, collaborations, and involvement with local, regional, state, and national library organizations and other civic organizations where a library/information services perspective would be beneficial.</b>		<b>Priority: Promoting Awareness</b>
<b>Activities</b>	<p>Years 1-5: CLRC staff members will participate in professional organizations outside of their role at the Council.</p> <p>Years 1-5: CLRC will reach out to local civic and governmental organizations that can benefit from services directly related to job functions.</p>	<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	<p>CLRC staff will participate in library/archives/museum professional organizations and activities that support and promote the services of the Council and the needs of its</p> <ul style="list-style-type: none"> <li>- # of memberships;</li> <li>- # of meetings attended;</li> </ul>

		members.	<ul style="list-style-type: none"> <li>- # of elected offices held (held by CLRC staff)</li> <li>- # of committee memberships (held by CLRC staff)</li> </ul>
		Local civic and governmental organizations will be familiar with their area's libraries, recognize their value to the community, and support their libraries.	<ul style="list-style-type: none"> <li>- # of library partnerships with other civic organizations; success of library-related legislation in the community;</li> <li>- adequacy of library funding from qualitative survey (biannual)</li> </ul>
	<b>Operations/Planning Notes:</b>	All staff are involved in professional and other civic organizations, as appropriate. Working group will be led by Executive Director with staff participation.	

• VII. Communications

<b>Goal 1. CLRC will regularly communicate with staff at member libraries and assess their needs and develop appropriate services.</b>		<b>Priority: Member engagement</b>	
<b>Activities</b>	<p>Years 1-5: CLRC staff and management will visit members and prospective members to share information about CLRC programs and services.</p> <p>Years 1-5: CLRC will elicit feedback from members during committee and Board meetings and at CLRC-sponsored events.</p> <p>Years 1-5: CLRC will develop a one-sheet to distribute to new members and update it annually.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Member libraries will be aware of CLRC programs and services and will understand the benefits of membership.	<ul style="list-style-type: none"> <li>- # of site visits, emails &amp; calls;</li> <li>- # of members</li> </ul>
		New member libraries and cultural heritage organizations will join CLRC at the appropriate membership level.	<ul style="list-style-type: none"> <li>- number of new member organizations</li> </ul>
		New staff members will be aware of the services and participation opportunities available to them.	<ul style="list-style-type: none"> <li>- qualitative survey (biannual)</li> <li>- reports from member library staff</li> </ul>
	<b>Operations/Planning Notes:</b>	ED regularly visits members and prospective members. Other professional staff participate in visits according to their areas of expertise (e.g. an archival consultation, or a website design consultancy).	

<b>Goal 2. CLRC will use a broad array of options to communicate with its members and stakeholders in the most effective manner.</b>		<b>Priority: Member communications</b>	
<b>Activities</b>	<p>Year 1: CLRC will explore ways to parse the listserv so that CLRC members can subscribe to the content most relevant to them.</p> <p>Years 1-5: CLRC will produce a weekly newsletter to keep members informed of events, activities, peer accomplishments, etc.</p> <p>Years 1-5: CLRC will use social media tools to share news and promote programs and services.</p>		<b>Evaluation/Assessment Method</b>

	Years 2 and 5: CLRC will undertake a comprehensive website review that uses member feedback and user experience (UX) techniques to assess the effectiveness of the website and make suggestion for changes or overhaul as necessary (based on a 3 year cycle, Year 2 will be the third year of the current website).		
	<b>Intended Results</b>	CLRC members will be well informed of the Council's activities, initiatives and services.	<ul style="list-style-type: none"> <li>- # of media outlets used;</li> <li>- estimated number of additional contacts</li> </ul>
		The number of subscribers to CLRC communication outlets will grow as members view these outlets as useful tools.	<ul style="list-style-type: none"> <li>- # of subscribers to CLRC communication tools;</li> <li>- # of communication outlets used</li> </ul>
		CLRC will maintain a dynamic, up-to-date website.	<ul style="list-style-type: none"> <li>- number of updates posted per week</li> <li>- statistics for CLRC website use</li> </ul>
	<b>Operations/Planning Notes:</b>	R & D librarian is responsible for listserv management and website. Outreach Coordinator will create newsletter.	

<b>Goal 3. CLRC Committees and Special Interest Groups will provide opportunities for member involvement.</b>		<b>Priority: Member engagement</b>	
<b>Activities</b>	<p>Years 1- 5: CLRC will conduct an annual Board and Committee orientation for all committee and Board members. This will be held shortly after the Annual Meeting of each year.</p> <p>Years 1-5: CLRC's Executive Director will present a list of all established committees and its members to the Board of Trustees for an annual review .</p> <p>Years 1-5: CLRC will continue to assemble SIGs based on the reported and anticipated needs and interests of the membership.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Committee chairs and members will have a clear understanding of the committee's role in CLRC governance.	<ul style="list-style-type: none"> <li>- # of committee meetings;</li> <li>- # of committee members;</li> <li>- feedback from committee members</li> <li>- minutes of committee meetings</li> </ul>
		CLRC will strive to ensure that committee membership reflects the diversity and scope of all Council members.	<ul style="list-style-type: none"> <li>- # of members;</li> <li>- types of members</li> </ul>
		Special Interest Groups and Committees will provide an opportunity for member engagement, involvement, and a pathways to leadership.	<ul style="list-style-type: none"> <li>- # of members participating in SIGs</li> <li>- # of members participating in committees or <i>ad hoc</i> working groups;</li> <li>- qualitative survey (biannual)</li> </ul>
	<b>Operations/Planning Notes:</b>	ED takes the lead with most committees; AD takes the lead with Nominating Committee; each professional staff member may be the lead with SIGs related to their areas of expertise.	

<b>Goal 4. CLRC will market ESLN products that benefit the information needs of the region.</b>		<b>Priority: Awareness</b>	
<b>Activities</b>	Years 1-5: CLRC will participate in BOCES regional conferences as a vendor. (This will have the added benefit of promoting CLRC services more generally).		<b>Evaluation/Assessment Method</b>

	Years 1-5: CLRC will showcase its members' collections at other appropriate venues.		
	<b>Intended Results</b>	Educators will be aware of regionally significant primary source material available through shared member services (such as New York Heritage Digital Collections or New York State Historic Newspapers).	- # of CLRC-led training events for BOCES membership
		CLRC members and constituencies will become aware of locally or culturally significant holdings of member organizations.	- Analytics for web traffic via social media to CLRC area collections; - # of posts to CLRC social media and traditional electronic media (email, website, etc.) - qualitative survey (biannual)
	<b>Operations/Planning Notes:</b>	The AD will take the lead, assisted by the Digital Collections Librarian.	

● **VIII. Cooperative Services with Other Systems**

<b>Goal 1. CLRC will cooperate with other library systems to seek new services and new economies of service.</b>		<b>Priority:</b>
<b>Activities</b>	Years 1-5: CLRC will continue to explore cooperative arrangements with school and public library systems, as well as participating in ESLN and/or its members.	
	<b>Intended Results</b>	<b>Evaluation/Assessment Method</b>
	CLRC members will benefit from and find value in cooperative projects led by Empire State Library Network (ESLN), with active participation from CLRC staff.	- # of statewide and multi-regional projects in which CLRC staff participates - qualitative survey (biannual)
	CLRC, along with member libraries and library systems will collaborate on initiatives of mutual interest, including but not limited to professional development programming and cooperative efforts (i.e. Bridging the Gap).	- # of programs co-sponsored with individual libraries and library systems;
	CLRC members will benefit from effective statewide library programs, projects and continuing education opportunities provided in a cost-effective manner.	- # of contacts and meetings with representatives of the State Library - # of statewide library programs or services used by CLRC member libraries
	<b>Operations/Planning Notes:</b>	All staff are involved in collaborative efforts, based on their areas of expertise.

● **IX. Other Goals, Continuous Improvement**

<b>Goal 1. CLRC will run with optimal efficiency.</b>	<b>Priority:</b>
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<b>Activities</b>	<p>Years 1-5: The Executive Director will review the job descriptions of each staff member at the time of the annual review.</p> <p>Years 1-5: CLRC will hold bi-monthly staff meetings.</p> <p>Years 1-5: CLRC will work with an outside auditor to review fiscal management and share with the Board.</p> <p>Years 1-5: The Board will participate in an annual review of the CLRC Constitution, By-Laws, and Personnel Handbook.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC staff will continually assess operations and services so that members will receive quality services that are efficient and effective.	<ul style="list-style-type: none"> <li>- Currency of official job descriptions;</li> <li>- minutes from staff meetings;</li> <li>- annual audit;</li> <li>- latest revision dates for CLRC Constitution, By-Laws and Personnel Handbook</li> </ul>
		CLRC will support ongoing professional development for all staff.	<ul style="list-style-type: none"> <li>- # of workshops, conferences and courses attended</li> </ul>
	<b>Operations/Planning Notes:</b>	ED takes the lead in this area.	

<b>Goal 2. CLRC will analyze staffing needs and cost allocation on an ongoing basis.</b>			<b>Priority:</b>
<b>Activities</b>	<p>Year 1: CLRC will create a service-based organizational chart which will be reviewed by the staff and the Board of Trustees on an annual basis.</p> <p>Years 2-5: CLRC will review its organizational chart on an annual basis.</p>		<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	CLRC's staffing and organizational structure will reflect current needs and priorities of the Plan of Service and the membership.	<ul style="list-style-type: none"> <li>- Periodic review of organizational structure by the CLRC Executive Committee and Board of Trustees;</li> <li>- qualitative survey (biannual)</li> <li>- Annual review of job descriptions by CLRC staff as part of performance evaluation process</li> </ul>
		CLRC annual budget will be constructed to meet the needs of the membership.	<ul style="list-style-type: none"> <li>- Board review and approval of budget.</li> </ul>
	<b>Operations/Planning Notes:</b>	ED takes the lead, with assistance from the Finance Committee (for budgetary items), the Planning Committee and the Board of Trustees.	

<b>Goal 3. CLRC will diversify its funding base.</b>			<b>Priority:</b>
<b>Activities</b>	<p>Years 1-5: CLRC will explore funding opportunities from public and private, regional, state, and national agencies for specific projects.</p> <p>Year 1: CLRC will review its membership dues structure.</p> <p>Years 2-5: CLRC will review and implement new fee structures as appropriate.</p>		<b>Evaluation/Assessment Method</b>

	<b>Intended Results</b>	CLRC will offer a menu of fee-based add-on services that are available to member organizations.	- # of new services implemented; amount of additional income
		Grant funding will make it possible for CLRC to carry out specific projects that are of interest to the general membership or, in some cases, to a subset of the general membership.	- # of grants received; # of new projects
	<b>Operations/Planning Notes:</b>	ED will take the lead, with assistance from staff and guidance from the Finance Committee and Board of Trustees.	

<b>Goal 4. CLRC will serve as a proving ground for pilot services, activities, programs, etc. that meet member needs or expectations.</b>		<b>Priority:</b>
<b>Activities</b>	While there is no implementation plan for this, this area of the plan of service is designed to allow the Council to explore new initiatives such as: (Human Library - previous to this plan of service, there was no place for this, now is covered in "Coordinated Services, Goal 4"; , CNYFi, as of this plan, covered in "Coordinated Service, Goal 5", Little Free Library, now covered in "Advocacy, Goal 3".) Sustainable projects may be included in future plans of service.	<b>Evaluation/Assessment Method</b>
	<b>Intended Results</b>	Members will benefit from CLRC's operating flexibility and initiatives as a result.
	<b>Operations/Planning Notes:</b>	All staff are encouraged to propose ideas, and are expected to pass along suggestions from the field as they occur.
		- qualitative survey (biannual)