

Missouri Evergreen Strategic Plan

Background

Missouri Evergreen was created as an initiative of the Missouri State Library under the leadership of Margaret Conroy. Since July 2012, the consortium has grown to fifty-two (52) member-libraries. Missouri Evergreen's tremendous growth is also evidenced by its collection size (3,634,188 items), bibliographic records (1,303,989), and circulation (2,961,875).

As Missouri Evergreen has matured, the need for a strategic plan to guide the consortium into the future was identified as priority by the membership, Board of Directors, and the State Library.

Strategic Planning Committee

In December 2020, the Missouri Evergreen Strategic Planning Committee was established. Members of the committee included Shannon Midyett (ex-officio), Tanya Shelton-Council, Sue Szostak, Teresa Tidwell, Pamela Withrow, and Steve Campbell (chair). Candy Warren later related Tanya Shelton-Council on the committee.

Purpose

The Strategic Planning Committee's purpose was to achieve "managed growth" by setting goals and developing an action plan to achieve those goals over the next three to five years.

The strategic plan will assist the consortium with grant applications, recruitment, and even possibly future vendor contracts. Most importantly, the plan will provide stability and instill member-libraries with confidence in the future of the consortium.

The strategic plan will help improve the consortium so that it can eventually grow to encompass over 140 Missouri public libraries.

Methodology

The Committee surveyed the fifty-two (52) Missouri Evergreen member-libraries; ninety-eight (98) non-member-libraries in Missouri; and twenty-two (22) other Evergreen consortia throughout the United States and Canada. The library surveys were electronic and consisted mostly of multiple-choice questions; the data was collected and tabulated using Survey Monkey. The consortia survey consisted of open-ended questions.

Some of the survey data was given to the Personnel and Onboarding committees, who were working concurrently with the Strategic Planning Committee.

The Committee reviewed and discussed the survey data thoroughly and created a list of action items to address issues and member-library concerns. The action items were grouped into six (6) broad categories: outreach, migration/onboarding, reports, training, patron services, and consortium development/member-library services. Then, the Committee created a broad, overarching goal for each category of action items.

Finally, the strategic plan draft was presented to the Missouri Evergreen Board of Directors for review and feedback.

Outreach

Objective: Missouri Evergreen will continue to expand its membership through improved promotional and recruitment efforts.

Actions:

- Create a permanent Recruitment Committee to collaborate with the consortium director to recruit new member-libraries.
- Focus recruitment efforts on small and medium libraries.
- Recruit five new libraries for migration into the consortium each year.
- Utilize member-library survey results for marketing and demonstrations, such as satisfaction rates and benefits valued most about the consortium.
- Add a new FAQ page to the website to address misconceptions about Missouri Evergreen, such as estimated ILL traffic based on library size.
- Create a video promoting the consortium with testimonials from patrons, library staff, and Library Board members talking about the benefits of the consortium and resource sharing. Each member will be asked to submit a 30-second clip. The video will be placed on the Missouri Evergreen website, shared on social media, and utilized for other marketing.
- Create a quarterly e-newsletter for the consortium. This will be a duty of the consortium director.
- Submit content from the consortium e-newsletter to MO-INFO each quarter. This will be a duty of the consortium director.
- Offer a virtual demonstration each year and invite all non-member libraries to attend.
- Offer an annual preconference session at an MPLD and/or MLA to provide either a live Missouri Evergreen demonstration or answer questions for prospective member-libraries.

Migration/Onboarding

Objective: Missouri Evergreen will minimize barriers to joining the consortium and offer comprehensive assistance to new member-libraries during the onboarding process.

Actions:

- The Onboarding Committee will review the Strategic Planning Committee's member-library survey and address issues expressed by respondents about their migration experience.
- The Onboarding Committee will create a plan for incoming libraries to clean-up their database within a mutually-agreed upon time frame.
- Every effort will be made to meet prospective member-libraries timelines for migration with special attention to those facing vendor contract deadlines. The consortium cataloger and Cataloging Committee will devote time and focus resources on assisting prospective member-libraries with catalog clean-up efforts necessary to meet membership requirements.
- The consortium will include information about the transfer of bill data (how the migrated data will appear) in the onboarding process for new member-libraries.
- A member of the Reports Committee will meet with new member-libraries prior to migration to demonstrate saving and renaming report templates to their own private folders.
- Create a guide or list for the website showing all the recommended printers and scanners for Evergreen, such as the make and model of preferred printers and barcode scanners.
- The Onboarding Committee will survey all new member-libraries six months after migration to evaluate their migration experience and the need for additional training.

Reports

Objective: Missouri Evergreen will improve the Evergreen Reporting Module for ease-of-use by its member-libraries through software support, member-library training, and software development.

Actions:

- Create a listserv specifically for staff at each member-library who generate reports.
- Work with Equinox and other consortia to develop a new Reporting Module, using the new Software Development Fund to fund the project.
- Contract with an individual to create reports for member-libraries who require assistance. This could be a duty of the consortium director, if the individual has the proper skill set.
- Offer an annual in-person training session on generating reports, including reports specifically needed for the Missouri Public Library Survey. The session will be part of the consortium's preconference session at either a MPLD or MLA conference. This presentation could be a duty of the consortium director, if the individual has the proper skill set.

Training

Objective: Missouri Evergreen will provide comprehensive, up-to-date, and readily accessible training resources to its member-libraries.

Actions:

- Create a standing Training Committee, which should include the chairs of the three other standing committees, consortium cataloger, and consortium director. The Committee will direct the creation of additional training resources.
- Create instructional videos for using Evergreen's inventory feature and reporting module. These resources will be placed on the consortium website. These videos could be recordings of in-person training sessions.
- Create a "landing page" for training materials on the consortium website, like NC Cardinal offers, to organize YouTube videos.

(Most member-library training requests encompassed cataloging and reports. For additional training recommendations, see Reports section and the Cataloger Position job description.)

Patron Services

Objective: Missouri Evergreen will provide positive, seamless service to its patrons, and assure that requested items are delivered in a timely manner.

Actions:

- Create a guide with screen shots for patrons on how to use the patron reading history feature. The guide will be placed on the consortium website.
- Appoint a committee to explore possible shared circulation policies. Many other Evergreen consortia share some circulation policies and Equinox has also encouraged our consortia to share some policies.
- Appoint a committee to explore the concept of a consortium-wide library card.
- Appoint a committee to study the length of time it takes for materials to be transferred between member-libraries. The committee should review the Strategic Planning Committee consortia survey to compare material transfer times. The length of time could be impacted by the courier; the frequency that holds are pulled by member-libraries; and number of days each week that member-libraries receive courier service.

Consortium Development/Member-Library Services

Objective: Missouri Evergreen will strive to make improvements in governance, communication, and participation, to meet the needs of a growing and developing consortium.

Actions:

- Explore the possibility of using its Software Development Fund to develop Evergreen software to allow member-libraries to include photos in patron records.
- The consortium chair or director will reach out to library directors and non-directors at member-libraries who have never served on committees to serve on new committees, in order to bring diversity of membership to the new committees.

- Record and post all Missouri Evergreen Board and membership meetings to the consortium YouTube channel for those member-libraries who are unable to attend.
- Send the member-libraries a Doodle poll to find if there is a new date or time that may work better for member-libraries to attend the membership meeting.
- Organize an annual Missouri Evergreen conference for member-libraries. It could be combined with the consortium's preconference session at MPLD and/or MLA conference. It could include an open forum, where members can share information and ask questions about circulation, cataloging, and reports issues.
- Revise the consortium bylaws to require at least one representative from different size libraries on its Board of Directors; at least one small library, one medium library, and one large library.
- Appoint a committee to explore the possibility of allowing non-public libraries, such as school libraries, special libraries, and academic libraries, to join the consortium. The committee should present a report to the Missouri Evergreen Board of Directors outlining the pros and cons related to non-public libraries joining.
- Appoint a committee to explore the concept of the consortium managing the Evergreen software/ILS itself in the future, hiring a system administrator.
- Create an incremental disciplinary action plan for all policy violations, similar to those for the consortium's cataloging requirements.
- Create an appeal process for member-libraries who reach the final step of the incremental disciplinary action plan, such as having an independent mediator hear the case, prior to being asked to leave the consortium.
- Conduct an annual member-library satisfaction survey and share the results with the member-libraries and Missouri State Library.
- Conduct a survey of member-libraries about the new fee schedule one year after implementation (late summer 2022) and two years after implementation (late summer 2023). The results will be shared with member-libraries and the Missouri State Library.

Part-Time Consortium Director

The Missouri Evergreen Board of Directors should create a part-time director position for the consortium.

The position will work with the Recruitment Committee to recruit new member-libraries; schedule and present Evergreen demonstrations (along with Committee chairs) for prospective member-libraries; write the annual Missouri Evergreen grant; attend all committee meetings; possibly assist member-libraries with generating reports; take minutes at committee and Board meetings; archive minutes; and maintain/update the consortium website.

Amigos, or another entity, should continue to maintain the financials for the consortium, such as accounts payable.

The Missouri Evergreen Board of Directors should supervise the part-time director.

Cataloger Position

The Missouri State Library is providing Missouri Evergreen with a grant-funded full-time cataloger position in FY 2021-2022. The position will create cataloging training materials and video tutorials; attend the Cataloging Committee meetings; clean-up the Missouri Evergreen database; assist new member-libraries with database clean-up prior to migration; create a cataloger certification process specific to Missouri Evergreen; and assist member-libraries with cataloging and cataloging issues.

Once the grant-funded position ends, Missouri Evergreen should attempt to continue funding the position. The permanent position would either be part-time or full-time if the Missouri State Library would agree to share the ongoing cost.

The position should be supervised on a week-to-week basis by the Cataloging Committee in consultation with the Missouri Evergreen Board of Directors.