# Information Delivery Services Project Strategic Plan for 2010-2013

## Vision Statement

The Information Delivery Services (IDS) Project strives to be an innovative model of library cooperation for effective resource sharing, promoting community engagement, staff development, best practices, and research & development.

## Mission Statement

The mission of the IDS Project is to continually implement and objectively evaluate innovative resource-sharing strategies, policies and procedures that will optimize mutual access to the information resources of all IDS Project libraries, through the development of a rapid and effective resource-sharing system among libraries in New York State. The IDS Project will remain connected to the needs of its partners through its continued operation from within an academic library.

## Strategies & Goals

### Strengthen the IDS Project’s unified community of trust and support.

As a cooperative, our success depends upon each member institution trusting and supporting the others. We must continually foster this community through ongoing engagement and collaboration.

1. Coordinate events that gather our membership together to reinforce relationships, skills, and a shared vision.
   1. Continue to organize an annual conference that is affordable, relevant, and showcases the innovations in resource sharing.
   2. Host periodic workshops that focus upon ongoing training and skills development.
2. Develop and support volunteer projects and programs that support our membership through the collective talent within the IDS Project.
   1. Utilize the Mentor Program to provide outreach support to our membership through consultations and training.
   2. Utilize the Technology Advisory Group (TAG) to develop innovative tools that benefit the resource sharing efforts of our members.
   3. Actively recruit talented volunteers from across the IDS Project to work on special projects (e.g., maintaining the Article Licensing Information Availability Service (ALIAS)).
   4. Encourage the creation of working groups to address interests of the community.
3. Support the shared development of community-driven resources and tools.
   1. Develop a shared knowledgebase of ILLiad best practices in the Workflow Toolkit and promote its adoption by our membership.
   2. Support the shared development of the Getting It System Toolkit (GIST) towards building a diverse and useful cooperative collection.

### Lead distributed research and development groups.

Innovative resource sharing requires a management structure for supporting the research and development of new technologies, in addition to the adaptation of existing technologies, which meet the collective needs of our membership. This structure must facilitate the coordination of multiple development projects.

1. Position the Technology Advisory Group to manage our various research and development teams.
   1. Develop a mechanism for evaluating project proposals, prioritizing project development, and reporting project progress.
   2. Add the TAG chair to the IDS Project Management Team.
2. Provide our research and development teams with project management training and resources.
   1. Provide staff development in project management that empowers our developers to effectively organize and lead R&D projects.
   2. Provide our R&D teams with an effective project management platform (e.g., Basecamp).
   3. Develop a project plan template that will help guide our R&D projects.
3. Provide our programmers with software development training and resources.
   1. Provide training in software development and best practices for designing new software and learning various programming languages.
   2. Provide our programmers with an effective collaborative development platform (e.g., versioning software).
   3. Adopt agreed-upon licensing for our software (e.g., Creative Commons).
4. Develop a framework for distributing and supporting our software.
   1. Adopt a platform for distributing our software and providing documentation.
   2. Adopt a platform for receiving and managing support requests from end users (e.g., FootPrints).
   3. Provide our R&D teams with remote support software (e.g., GoToAssist) for assisting end users.

### Develop strategic plans for the Mentor Program & Technology Advisory Group

The Mentor Program and Technology Advisory Group each require a strategic plan that supports their roles within the IDS Project. This will allow each group to remain focused and guide their activities in the coming years.

1. The Coordinator of Mentors & Training will develop a strategic plan covering no less than the upcoming two years.
   1. The IDS Project Management Team will review the strategic plan prior to approval by the IDS Project Director.
   2. The Coordinator of Mentors & Training will provide periodic updates regarding the strategic plan throughout its term.
2. The Chair of the Technology Advisory Group will develop a strategic plan covering no less than the upcoming two years.
   1. The IDS Project Management Team will review the strategic plan prior to approval by the IDS Project Director.
   2. The Chair will provide periodic updates regarding the strategic plan throughout its term.

### Develop a sustainable business plan

The IDS Project needs to have a business plan that includes an organizational, financial, and operational structure that will support our membership and simultaneous research & development projects. It is also vital that this plan allows the IDS Project to remain nimble enough to quickly capitalize on opportunities.

1. Explore options for formalizing the IDS Project as a legal entity and position it to secure higher levels of support and funding.
   1. Explore the benefits of non-profit status and types of legal entities (e.g., 501(c)(3) or LLC within SUNY Geneseo).
   2. Consult with possible partners (e.g., SUNY Geneseo, SUNY OLIS, CUNY OLS, etc.).
   3. Retain legal counsel, as required.
2. Develop an organizational infrastructure allowing for effective administration of the IDS Project.
   1. Establish positions for the Project Director and an administrative assistant.
   2. Operate a management team based at SUNY Geneseo that meets regularly with the Director and committee & group chairs.
   3. Structure an advisory council, consisting of administrative stakeholders throughout the IDS Project, which meets with the Director to discuss operations and set goals.
   4. Establish a standing marketing committee that will promote the IDS Project to members and non-members.
   5. Establish a standing conference planning committee that will work with local arrangement teams to organize the annual conference.
3. Develop a financial plan that will enable the IDS Project to be self-sustaining.
   1. Secure a fiscal agent for administering the IDS Project’s finances.
   2. Determine the real costs of operating the IDS Project, including monetary and in-kind costs.
   3. Develop a revenue plan that covers the IDS Project’s operating costs and facilitates the growth of reserve funds.
   4. Secure additional sources of funding to cover any unmet costs and increase the IDS Project’s capacity to serve its membership.
4. Develop the infrastructure for effective operational management.
   1. Develop load balancing strategies and tools to effectively manage request volume between members.
   2. Reinforce the shared commitment among members to achieve the IDS Project’s benchmarks.
   3. Devise a set of policies to equitably arbitrate disputes among members.
   4. Develop a plan for predicting and managing future membership growth.

### Proactively engage vendors and external organizations

It is in the best interests of the IDS Project to build positive relationships with library-related organizations and various library vendors. Collaborating with them will allow the IDS Project to advance the interests of its members through the introduction of new services and products, as well as through funding and other support.

1. Strengthen our existing relationships with organizations in New York.
   1. Continue close partnerships with SUNY OLIS, CUNY OLS, the New York State Library, and New York Public Library to support the mission of the IDS Project.
   2. Expand our collaboration with the 3Rs, NYLA, NYSHEI, and ConnectNY to encourage the development of a rapid and effective resource-sharing system among libraries in New York State.
2. Build supportive relationships with library groups and consortia outside of New York to collaborate on mutually beneficial projects.
   1. Continue working with library consortia (e.g., Maryland IDS, Orbis-Cascade Alliance, Kudzu, Committee on Institutional Cooperation, etc.) to collectively improve resource-sharing services.
   2. Collaborate with library service providers (e.g., LYRASIS, Colorado Alliance, Greater Western Library Alliance, Center for Research Libraries, etc.) to develop and share innovations.
3. Work closely with library vendors on the enhancement and development of beneficial products and services.
   1. Continue close collaboration with library vendors (e.g. Copyright Clearance Center, Online Computer Library Center (OCLC), Atlas Systems, Serials Solutions, and Better World Books) on projects that benefit our membership.
   2. Build new or closer relationships with book jobbers and other organizations (e.g. Amazon, Baker & Taylor, and Google) that would benefit our membership.

### Improve the IDS Project’s performance in sharing resources.

The IDS Project’s success depends on satisfying member libraries’ users with a resource delivery experience that meets their expectations. Therefore, the IDS Project must be dedicated to improving all aspects of the resource sharing activity of its members.

1. Participate in the establishment of a new statewide delivery system.
   1. Assist with the development of an RFP consistent with IDS Project needs.
   2. Provide guidance with using tools and processes for assessing delivery performance.
2. Explore development of regional processing centers to provide a cost-effective system for Empire State College undergraduate students, CUNY undergraduate students and for libraries with low numbers of ILL transactions.
   1. Perform an environmental scan to determine the need for and feasibility of this service.
   2. Identify potential stakeholders and ILLiad licensing requirements.
   3. Develop and evaluate a pilot project.
3. Explore ship-to-home strategies.
4. Increase the number of ILL requests originating from IDS Search.
   1. Expand the adoption of IDS Search among member libraries.
   2. Increase the number of end users.
   3. Include article metadata.
   4. Actively improve its usability and functionality.
5. Explore the subscription or pay-per-view usage of Google Books.
   1. Attend International Coalition of Library Consortia (ICOLC) meetings.
   2. Determine pay-per-view costs and workflow.
   3. Pending court settlement, evaluate subscription fees and licensing.
6. Raise fill rate among IDS Project members to 60% for loans and articles.
7. Improve service offerings to members.
   1. Enhance unmediated loan requesting within the IDS Project by developing a system that selects lenders based upon item availability and lending policies.
   2. Enhance the Transaction Performance Analysis Module (TPAM) to better assist members in evaluating and improving their resource sharing and collection development services (e.g. by including SUNY Business Intelligence Initiative (SBII) and other data sources)