

**Capital District Library Council Plan of Service  
2006-2011**

Element	Goal Statement	Activities	Intended Results	Evaluation Methods	Years
<b>1. Resource Sharing</b>					
5.2 Cooperative Collection Development	Academic and hospital library collections are appropriate to meet the research needs of the region.	Manage CCDA program. Monitor academic subject assignments. Purchase AV materials for hospitals. Distribute HLSP grants.	Academic and hospital libraries receive funding to purchase materials which strengthen their collections and are available for use throughout the region.	Libraries report items purchased. Libraries report ILL statistics.	ALL
5.3 Delivery	Libraries will be able to easily share materials via a regional delivery service.	Provide access to a regional delivery service.  Investigate feasibility of linking to delivery services statewide.	Libraries can receive materials quickly from most libraries in the region. Libraries can package materials easily.	Cost comparison with USPS, other delivery options.  Turnaround time study.	All  2,4  2,3
5.4 Interlibrary Loan	Members of all types share resources.	COIL recommends policies, monitors procedures, provides directory information.  CDLC provides ILL assistance to members.	Maximize the number of resources available to library users through interlibrary loan.	ILL survey	ALL
	Promote the use of electronic ILL through OCLC, ILLiad, and regional systems	Support regional ILLiad group Support OCLC selective users Support regional ILL systems.	Streamlined ILL procedures for libraries.	Number of libraries participating in electronic ILL services.	ALL

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	Facilitate library access to medical information through management of the Medical Information Services Program.	Collect data from libraries on medical ILLs. Distribute funds.  Work with Albany Medical Center to set up and manage a medical information webpage.	Libraries receive funding to support costs of medical ILLs.  Libraries can provide medical ILLs quickly and efficiently.  Reliable medical information is available via a page on the CDLC website.	Libraries report number of medical ILLs.  Evaluation of training sessions are positive; participants report use of information gained in training.  Numbers of hits on medical information web page.	ALL
5.5 (other) Direct Access Program	Library users are able to borrow directly from other member libraries.	DAP Committee manages direct access program.	Users can borrow materials in person without going through ILL.	Number of libraries participating in the program. Number of patron cards distributed. Libraries report satisfaction with the program.	ALL
<b>2. Technology Services</b>					
5.6 Virtual Catalog	Provide a virtual union catalog, "CaDiLaC Online" which is a single point for electronic access to the holdings and circulation status of member library catalogs.	Upgrade to URSA 4.0. Provide training to libraries on URSA 4.0.  Add new libraries as appropriate.  Investigate new software options (year 2-3)	Users can search for materials easily and quickly and determine circulation status.	Maximize number of catalogs and number of libraries accessible through the virtual catalog.  Usage data.  Major evaluation of regional automation programs (year 2) indicates support for project.	ALL

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5.7 Union Catalog	Provide a Partial Union Catalog (PUC) as one catalog in the virtual union catalog for library collections not accessible through the virtual union catalog.	Evaluate software used for PUC. Consider move to software integrated with URSA.	Users have access to catalogs not accessible through the virtual catalog because of security restrictions, or technology limitations.	Number of libraries and number of library holdings included in the PUC. Major evaluation of regional automation programs (year 2) indicates support for project.	ALL  2
5.8 Union List of Serials	Provide an accurate, up-to-date regional union list of serials (ULS) accessible through CaDiLaC Online and OCLC.	Evaluate software used for ULS. Consider move to software integrated with URSA.	Users have access to serial holdings information in member libraries.	Usage data (through CaDiLaC Online), number of libraries profiled, number of updates annually. OCLC usage data.	ALL
5.9 Virtual Reference	Investigate feasibility of regional virtual reference service. Implement pilot or project as appropriate.	Survey libraries, investigate options.	Develop regional virtual reference program if deemed beneficial to members.	Number of libraries participating in the virtual library service.	2,3
5.10 (other) Cataloging Services	Offer quality, cost-effective cataloging services to member libraries	Provide retrospective conversion, copy, and original cataloging for member libraries using OCLC.  Catalog materials for hospital libraries using OCLC. Add records to PUC if appropriate.	Increased number of bibliographic resources available electronically to the region.	Numbers of items cataloged.  Number of libraries using service. Members report satisfaction with service.	ALL
5.10 (other) Cataloging Services	Increase the number and quality of bibliographic records available electronically in the region by providing grants for recon and metadata enhancement projects.	Work with RAAC subcommittee to develop guidelines, invite applications, and award grants.	Increased number of bibliographic records and increased information in bibliographic records available electronically in the region.	Number of grants provided. Number of bibliographic records converted. Number of records enhanced.	ALL
5.10 (other) Digitization	Member libraries will become familiar with digitization issues and techniques.	Offer a digitization training series.	Member libraries understand uses of digitized images and develop skills in digitizing and cataloging digitized materials.	Training evaluations, numbers of items digitized.	1,2,3

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	Access to member library digitized collections will be available from a single location.	Select software, develop pilot project, expand pilot.	Provide access to digital collections from all types of member libraries.	Numbers of collections available from different types of libraries. Use of collections (website data).	2,3,4,5

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<b>3. Special Client Groups</b>					
5.11 HLSP	Provide hospital libraries information and resources needed to deliver quality information services.	Provide training and support for OCLC, Docline, CaDiLaC Online. Provide CDLC ILL service as needed.	HLSP member library staff use ILL services effectively to provide needed resources.	Numbers of questions received. Training ILL statistics.	ALL
		Support collection development by providing grants for materials purchases. Provide centralized database(s) for the HLSP group. Provide a health-related audio-visual materials collection for use by HLSP members. Provide cataloging for HLSP libraries.	HLSP member libraries have access to a wider range of resources at no cost to the hospital.	Annual reports of numbers and types of materials purchased. Annual review of library resources by HLSP Coordinator. Numbers of AV materials borrowed by the libraries. Numbers of items cataloged for the libraries.	ALL
		Offer at least 1 MLA accredited continuing education program per year in addition to non-accredited workshons. Offer in-service/onsite training as needed and requested by members. Offer classes to all CDLC members and to HLSP members in other regions. Update the HLSP manual.	HLSP member libraries gain and maintain skills needed for accreditation and to improve library service.	Number of participants in training workshops and continuing education classes. CE and workshop evaluations. Annual HLSP member survey.	ALL
		Conduct annual CDLC/HLSP Library Standard Assessment Survey.	HLSP member libraries are aware of their strengths and weaknesses.	Number of onsite sessions provided. All libraries are assessed and results are discussed with libraries.	1 ALL

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		Annual membership meeting Occasional searching club meetings Publish quarterly HLSP newsletter Maintain HLSP email list	HLSP members have an easy way to exchange information as well as access to information about the HLSP program.	Numbers of participants, feedback of participants. Number of phone and email contacts. Number of site visits conducted by HLSP coordinator.	ALL
5.12 <b>DHP</b>	Provide historical repositories with information and resources needed to manage and provide access to their resources.	[See the separate DHP plan]	Statewide goal for this program: Better access to historical records	Increase in number of historical records inventoried. Increase in number of historical records cataloged. Increase in number of historical records identified in the region. Number of participants in training. Training participants report how training has been used. Increase in number of sites using appropriate preservation methods.	ALL

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<b>4. Continuing Education and Training</b>					
5.13	Provide a wide variety of continuing education and training opportunities annually sponsored by CDLC, RAAC, HLSP, MISP and the Coordinated Collection Development Committee to member institution staff.	Annual emerging technologies program. Annual CCD program. HLSP programming offered to HLSP libraries and general CDLC membership when appropriate. Annual Medical ILL programming. Provide publicity for programs through CDLC website, email, coordination with member systems, and mailings as appropriate. Present programs in various locations in the region. Develop a survey or other tool to assist in determining continuing education needs of libraries. Coordinate programming with member systems.	Staff of member libraries are provided information needed to deliver quality library service.	Determine CE needs through surveys, CE and training program evaluations, and committee discussions. Track number of participants by type of library.  Require evaluations of every program and training session.  Track results of evaluations.  Use pre- and post-training assessments when appropriate to determine participant use of information provided in training sessions.	ALL
	Support membership groups such as Capital Area Library Assistants and the Business Librarians Group in providing programs for their constituencies.	Provide assistance in developing programs as requested. Provide publicity for programs.	Librarians and library staff of the region have the information needed to deliver quality library service.	Membership groups provide feedback about the results of each program, the numbers of participants, and the types of libraries represented.	ALL

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<b>5. Consulting and Technical Assistance Services</b>					
5.14	Provide consulting and technical assistance to member libraries on operational and information needs.	Answer questions or provide referral. Determine if a regional information need exists that CDLC can respond to.	Libraries have a knowledgeable local source for information.	Number of questions answered about operational and information needs.	ALL
	Provide assistance, training and support for members in the use of products and services provided by CDLC, such as CaDiLaC Online, the ILLiad group, cataloging services, delivery, and resource sharing services.	Assure that all CDLC staff are informed about CDLC services.  Provide clear, up-to-date information about services on CDLC website and in other communications to members.  Begin regular satisfaction surveys for members.	Libraries will be successful in using CDLC services to provide and improve library service.	Number of questions answered successfully about CDLC services as reported at the time of the question.  Members report satisfaction with CDLC assistance on member survey.	ALL
	Provide assistance, training and support for members in the use of statewide services and information resources, such as NOVEL.	Promote NOVEL and other statewide services to members.  Assist members through training in how to best use the resources.	Member libraries have the information they need to use the resources successfully to help patrons meet information needs.	Number of libraries using NOVEL and other statewide services.	ALL

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<b>6. Coordinated Services</b>					
5.15	Develop, encourage, facilitate, and promote cooperative efforts among member libraries.	<p>Provide access to WALDO and other database vendors.</p> <p>Support ILLiad group.</p> <p>Support hospital-specific cooperative efforts.</p> <p>Stay aware of cooperative efforts in other parts of the state.</p> <p>Act on other suggestions for cooperative efforts as they arise.</p>	<p>Libraries save money through cooperative purchases coordinated through CDLC.</p> <p>Libraries improve services through cooperative efforts coordinated through CDLC.</p>	<p>Number of libraries purchasing through WALDO and other database vendor. Estimated cost savings for database purchases.</p> <p>Number of libraries participating in ILLiad group. ILLiad group participants express satisfaction and continue to participate each year.</p>	ALL

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<b>7. Awareness and Advocacy</b>					
5.16	Provide regional leadership in educating the public and New York State government in recognizing the value of member libraries and the contributions they make in areas such as education, economic development, and health care.	Participate in NYLA Legislative Committee advocacy efforts.  Educate CDLC leaders about how to advocate.  Educate CDLC member libraries about need for advocacy efforts.	Increased financial support for libraries.	Number of contacts with legislators.  Number of member libraries and member library staff participating in advocacy efforts.	ALL
	Libraries, the public, and New York State government recognize the value of library systems and the contributions they make to library service.	Participate in NYLA Legislative Committee advocacy efforts.  Educate CDLC member libraries about the role of systems in New York state.  Educate CDLC member libraries about need for advocacy efforts on behalf of systems.	Increased financial support for library systems.	Number of contacts with legislators.  Number of member libraries and member library staff participating in advocacy efforts.	ALL
	Foster awareness of and increase financial support for CDLC programs through a personal membership program for individuals and a library retirees group.	Maintain and expand personal memberships and benefits.  Continue to support and develop library retirees group.	Increased awareness of CDLC and library issues in the region.  Increased financial support of CDLC programs.	Number of personal members at each membership level.  Number of retirees on the mailing list and email list.	ALL

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		Planning group to develop a program for retirees every other month from September through June each year.	Self-sufficient library retirees group.	Number of retirees attending programs.	

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<b>8. Communication Among Member Libraries and Library Systems</b>					
5.17	Provide a variety of opportunities and methods for member libraries, library staff, and repository staff to learn about programs, policies, and procedures at CDLC and member institutions.	Provide a website with up-to-date information about CDLC programs and services. Provide a jobs opportunities section on the CDLC website.  Provide a calendar on the CDLC website with information about CDLC and other library programming. Continue paper <i>ReCap</i> newsletter at least twice a year. Provide general and specific email lists appropriate for member interests and needs.  Provide up-to-date brochures for CDLC, HLSP, DHP, and other CDLC services as appropriate. Distribute press releases for CDLC activities.	Increased knowledge of and participation in CDLC programs and services. Increased knowledge about the activities of area libraries and library staff.	Number of hits to pages on website.  Feedback received about successful use of website.  Number of newsletters distributed.  Number of press releases and other articles published.  Number of participants on email lists.	ALL

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<b>9. Cooperative Efforts With Other Library Systems</b>					
5.18	Collaborate with public and school library systems when developing and marketing CDLC services.	Assure school and public library representation on all CDLC committees.  Work with school library systems to provide programs and training sessions designed to meet needs of school librarians.  Work with public library systems to provide programming in their regions as appropriate.	School and public libraries have the information they need to successfully use CDLC products and services. Duplication of services is avoided.  All types of libraries benefit from understanding the needs and activities of other types of libraries.	Track participation in CDLC programs by type of library.	ALL
	Collaborate with public library systems to provide a regional delivery service which includes the New York State Library. (see also 5.3)	Evaluate success of the delivery service annually.  Participating libraries to pay costs for the service.  CDLC to support service to the New York State Library.	Improved resource sharing because materials can be delivered to participating libraries quickly without the need for special packaging.	Numbers of member libraries participating in the regional courier service. Number of member libraries reporting satisfaction with the speed and benefits of the program.	ALL
	Collaborate with the other NY3Rs in grant applications, developing services, providing programming, and sharing ideas.	Meet and talk regularly with other 3Rs.	Access to a wider variety of programs for member libraries. Access to new ideas for CDLC staff and member libraries.	Numbers and types of cooperative efforts with other NY3Rs. Numbers of participants from outside the region using CDLC programs.	ALL

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<b>10. Other</b>					
<b>5.19 CDLC Administration</b>	Provide appropriate staffing to support CDLC services and programs, a work environment which will allow the staff to function effectively, staff development opportunities and human resources policies to support the staff.	Evaluate staffing needs regularly. Keep Employee Handbook up-to-date. Provide computers and other equipment needed for staff to work effectively. Provide opportunities for staff training and development.  Encourage staff to participate in regional, state, and national professional activities.  Market services to CDLC members. Staff to visit each member once a year.	CDLC staff have the tools necessary to provide member services.  CDLC staff are educated about the broader library environment as well as about the programs and services CDLC provides.	Staff report that they have the information and tools they need to meet their responsibilities. Libraries receiving services from CDLC report programs are being well managed.	ALL
	Provide fiscal policies and procedures to assure accountability to member institutions and funders.	Evaluate fiscal policies regularly. Consult with auditors as appropriate.	CDLC funds are managed appropriately and in a fiscally sound manner.	Annual audit report. Reports to New York State and other funders filed on time.	ALL
	Develop new funding streams to support CDLC programs and services.	Work with Resource Development Committee. Establish a program for corporate membership/support. Develop investment policy.	Increased income.	Funding is sufficient to support operations.	ALL  1