rails
Reaching Across Illinois Library System

125 Tower Drive | Burr Ridge IL 60527 | 630.734.5000 | Fax: 630.734.5050 | railslibraries.info

20 August 2018

TO: **RAILS Board of Directors**

FROM: **Deirdre Brennan**

SUBJECT: **Revised RAILS strategic plan**

In your packet, is a draft revised strategic plan for RAILS.

I am suggesting a four-year time period for the plan, 2018 through 2022. It is very difficult to predict how long a plan will remain useful; my approach is to keep the goals and objectives fairly high-level and develop an annual action plan that guides the course of our work more specifically and concretely each year. This approach has worked well, especially since we are required by the State Library to submit an operational plan each year.

As we have discussed previously, this plan is very much based on the data and feedback that we collected from members over the course of the past eight months. It is also based on staff analysis and recommendations of the best ways to achieve identified goals and serve our members in the best ways possible.

I would like the board to approve this plan by the September meeting so that we can launch it at the Illinois Library Association conference in October. In the meantime, we will also share it with staff and continue to fine-tune it.

I look forward to discussing the draft plan at our meeting.

Reaching Across Illinois Library System (RAILS)
2018-2022 Strategic Plan

Introduction and background

RAILS was established in July 2011 through a merger of five predecessor library systems. In 2013, the RAILS Executive Director asked the board for a strategic planning committee to help develop the first RAILS strategic plan. The planning committee, consisting of four board members and RAILS leadership staff, worked with consultants to develop the plan, which was approved by the board in February 2014. We have put this plan to good use, accomplishing many of its goals and undertaking many projects to meet the needs identified by RAILS members during the planning process.

The process used to develop our first strategic plan was extensive, as was appropriate. RAILS was a brand new organization. The system merger was recent and there was a lot of mistrust and fear among libraries about the enormous and sudden changes that had occurred. We hired an outside consultant to lead an objective planning process; held several focus groups for all types of libraries (academic, public, school, and special); and conducted member surveys, an environmental scan, and a needs assessment. The member input we received was crucial to the development of the plan and a major reason why it has helped us to be so successful since that time.

Plan update process

For this 2018 update, we used a more "lightweight" process. Beginning in November 2017, we:

- Provided RAILS members, board, and staff with an overview of the 2014 plan, how it was developed, and the input we received from member libraries during the development process
- Reported on what we have accomplished to meet the needs members identified in 2013 (posted on RAILS website at railslibraries.info/about/strategic-plan-progress)
- Sought input from members about their current challenges and concerns. Conducted in-person and online meetings (webinars) with members throughout the RAILS area, asking the question "what keeps you up at night" to prompt discussion of issues and concerns.
- Developed a needs assessment survey and encouraged all staff at all RAILS libraries to respond
- Gathered input from RAILS staff and board members
- Analyzed all feedback received and determined how current needs line up, or do not, with the goals and objectives of the 2014 plan. Modified or created new goals and objectives accordingly.

Throughout this process, we kept uppermost in mind that our new plan should be:

- Aspirational, grounded in reality, and future-focused
- Developed through a planning process that is transparent to members
- Reflective of member input gathered throughout the planning process

Data Analysis

The needs identified through all of the research specified above can be broken down into these broad categories:

RAILS libraries want help optimizing their resources, including varying types and levels of support to help them share resources more effectively, cooperative purchases and other programs/ services to help them optimize available tax dollars, and opportunities to share expertise and best practices with each other.

RAILS libraries want help deciphering and meeting the needs of an ever-growing diversity of patrons and potential patrons.

RAILS libraries want help articulating their value to users, potential users, funders, elected officials, and other stakeholders; assistance from RAILS in advocating for issues affecting libraries as appropriate; and help learning how to advocate for themselves.

RAILS libraries want help in becoming the best they can be through staff development, training, and other means, so they can continue to be vital and relevant players in their organizations or communities.

RAILS libraries want help in becoming more resilient and better prepared for the future. This includes assistance keeping abreast of trends and innovations in the library field, as well as changes in the overall environment that affect library service. Libraries would also like RAILS to help ensure the future of libraries and librarianship as a profession by preserving and advancing core professional values.

As a next step, we crafted these categories into a vision of success and goals and objectives delineating how to achieve the vision, keeping in mind our mission as a library system.

RAILS Mission & Vision Statements

Mission Statement

A mission statement defines an organization's core purpose or reason for existence. RAILS mission statement is:

> *RAILS is a multitype regional library system that fosters collaboration and resource sharing among libraries to empower them to better serve their clientele or library users.*

Vision Statement

A vision statement focuses on the desired future of an organization, including goals and aspirations. The following is the proposed vision statement for RAILS, keeping in mind all of the data collected during the strategic plan revision process.

> *Because RAILS is a leader, innovator, and partner in encouraging and supporting a powerful network of vital and energetic libraries:*
>
> - *RAILS members share resources seamlessly and robustly.*
> - *RAILS members are resilient and prepared to meet the ever-changing future.*
> - *RAILS members are highly-valued and seen as essential to anyone who lives, works, or goes to school in the state of Illinois.*

Strategic Goals & Objectives

Goal One: Promote, support, and expand resource sharing to optimize use of tax dollars and help libraries share resources to the fullest extent possible

Because libraries are stronger together, RAILS advocates for and works with them to share their resources through traditional means, such as physical delivery of library materials, and we constantly seek innovative strategies to expand resource sharing, such as providing access to digital content and creating opportunities for library staff to share knowledge and expertise. RAILS also leverages economies of scale to increase our libraries' purchasing power.

Objective: Develop and implement a plan to promote, support, and expand resource sharing among RAILS libraries and beyond

Objective: Lead and work with RAILS-area consortia and standalone libraries to expand resource sharing

- Continue to grow Find More Illinois
- Expand consortia/LLSAP grant offerings
- Provide cataloging and interlibrary loan training/consulting
- Offer alternatives to OCLC for cataloging and resource sharing
- Promote value of consortia membership and resource sharing to all types and sizes of RAILS libraries

Objective: Work with the Illinois State Library, Illinois Heartland Library System, and other stakeholders to improve physical delivery services through streamlining and standardizing operations and evaluating alternative methods and best practices

- Continue working with the Laboratory for Applied Spatial Analysis (LASA) to analyze current delivery routes and hub locations to find different options that will result in more efficient delivery services for all Illinois libraries
- Develop long-term plan to optimize number and location of RAILS delivery hubs
- Work with peer organizations in other states to adopt delivery best practices and innovations in Illinois
- Continue to evaluate and implement outsourcing of delivery as appropriate
- Evaluate the implementation of interstate delivery

Objective: Develop and implement innovative projects to expand access to a wider variety of resources for Illinois residents, including providing access to digital content/e-resources and expertise

- Continue to develop and grow eRead Illinois
- Provide access to BiblioBoard resources for everyone in Illinois
- Develop and grow the Explore More Illinois attraction pass program
- Work cooperatively to expand and promote the Digital Public Library of America (DPLA)

Objective: Use economies of scale to provide greater purchasing power for member libraries so they can offer more resources to their customers than they would be able to afford on their own

- Offer discounts and cooperative purchasing opportunities
- Provide statewide database access in cooperation with other partners

Objective: Offer members a variety of opportunities to build collaborative relationships to share best practices, expertise, and to develop innovative solutions to common issues and challenges

- Offer a variety of RAILS community email lists for all levels of library staff at all types of RAILS libraries
- Schedule RAILS member meetups throughout the RAILS area to provide networking opportunities for member library staff
- Provide support and exposure for existing networking groups throughout the RAILS area

Objective: Foster networking and collaboration between staff from all types of libraries (academic, public, school, and special) to create a community of connected peers and to build on the strengths of multitype cooperation

- Encourage all types of libraries to participate in RAILS resource sharing initiatives and projects
- Ensure that staff from all types of libraries are aware of the contribution each type of library makes to the system and to the Illinois library community as a whole
- Offer partnership grants to expand on initial multitype collaborative grant offerings and promote grant awardees to model best practices and to encourage other libraries to collaborate with each other
- Expand networking opportunities for staff from academic, school, and special libraries

---

We all need each other.
School library webinar comment

Goal Two: *Work with libraries of all types to tell the library story*

It is important that all libraries learn to effectively tell their story so that users and potential users know what libraries have to offer and so that taxpayers and other funders understand the value of library service. RAILS helps our members articulate their value to users, potential users, funders, elected officials, and other stakeholders. RAILS also articulates the importance of all types of libraries, advocates for issues affecting libraries as appropriate, and helps libraries advocate for themselves.

Objective: Help member libraries ensure that current/potential customers are aware of all of the programs/services/resources the library has to offer

- Provide continuing education on marketing skills
- Develop common talking points templates as appropriate to help all types of libraries promote library programs/services
- Offer templates for marketing materials via the RAILS website
- Help libraries share marketing best practices
- Offer discounts or cooperative purchases as appropriate on marketing products or services
- Assist with development of value and performance indicators such as ROI (Return on Investment)

Objective: Help member libraries prove their value to administrative bodies, funders, elected officials, etc.

- Offer continuing education on advocacy skills
- Provide talking points all types of libraries can use to promote their value
- Work with other stakeholders to foster the education of elected officials and funders regarding the value of libraries
- Provide access to advocacy tool kits and other advocacy-related information

Objective: Advocate for and help members advocate for all libraries as they face funding and other challenges

- Work with other stakeholders to ensure that members are aware of challenges facing all types of libraries, including pending legislation, funding challenges, and other issues of critical importance
- Provide talking points or other recommended courses of action members can take to support libraries as they face these challenges
- Help all types of libraries support school libraries, as library skills children are often first taught in school lead them to support all types of libraries throughout their lifetime

---

Nobody knows what a special library does.

Listening tour comment

I didn't know the library did that!

Freeport Public Library listening tour comment

Goal Three: Help libraries be the best they can be

RAILS wants to help staff in all of our member libraries grow and develop so they can help their libraries be the best they can be and to help them be vital players in their organizations or communities. We provide a broad range of training and consulting - from basic skills to new technologies and other innovative services. We also encourage and support the development of library leaders, leadership skills, and staff development in general.

Objective: Continue to provide continuing education (CE) to ensure ongoing staff development for all levels of staff at all types of libraries

- Offer CE throughout the RAILS area using a variety of different methods (in-person, webinar, videoconference, etc.)
- Offer CE grants to individual RAILS libraries, consortia, and networking groups to encourage them to offer CE of interest to other RAILS members
- Provide training and consulting to help libraries hire, retain, and reward a top-notch library staff that reflects the diversity of the community being served
- Continue to gather member input on CE needs and implement training to meet those needs

Objective: Ensure that all libraries are able to offer the best possible service to their community of users

- Complete development of revised membership standards and help libraries meet the new standards by offering training and other support
- Help libraries share and implement best practices
- Provide guidance on evaluating and measuring the impact of library services on customers

Objective: Ensure the ongoing education of library leaders and the development of leadership skills for library staff

- Continue to help plan and support Directors University
- Continue to help plan and support Elevate leadership program
- Continue to provide trustee training opportunities
- Offer CE that helps library staff develop leadership skills and that helps libraries be leaders in their organizations/communities
- Provide training on succession planning

RAILS continuing education is very valuable! A lot of libraries have no other options for providing training for their staff.
Indian Trails Public Library District listening tour comment

Goal Four: Prepare libraries for the future

RAILS strives to ensure the long-term sustainability of all libraries. Libraries have always played a vital role in building a civil and engaged society by upholding core library values such as intellectual freedom, access to information, and providing resources and services that educate and inform all library users and potential users.

RAILS helps our members to stay resilient by providing leadership on issues affecting them, helping them to navigate an ever-changing world, and assisting them in determining how to best respond to their customers' changing needs. In addition to preparing our member libraries for the future, RAILS also helps to ensure the future of libraries and librarianship as a profession by preserving and advancing core professional values.

Objective: Help libraries understand and respond to or even anticipate changing social issues and customer needs

- Identify issues and trends affecting RAILS members and provide CE/consulting to help them respond to those issues
- Provide diversity training to help libraries determine and meet the needs of a growing diversity of library customers and potential customers
- Offer CE/consulting on library safety-related issues
- Offer CE/consulting to help libraries deal with new social problems and issues and to serve people with special needs
- Continue to make libraries aware of current trends via the RAILS *Sparks* podcast and other means
- Provide CE and other assistance to help libraries learn how to best identify the changing needs of their customers/potential customers

Objective: Partner with libraries and other stakeholders to create an educated, engaged, and civil society

- Continuously work to expand access to library resources and services
- Address issues related to unserved Illinois residents
- Continue working toward a statewide library card

- Provide CE on customer/community engagement
- Advance core library values such as privacy, intellectual freedom, access to information and net neutrality
- Keep members aware of challenges to core professional values and possible actions they can take to respond to those challenges

---

How do we say yes to our students?
Academic library webinar comment

How do we serve a moving target of user needs and skills?
Indian Trails Public Library District listening tour comment

I don't want people to stop coming to the library because they don't feel safe.
Freeport Public Library listening tour comment

Goal Five: *Strive to be the best library system in the country*

RAILS needs to be the best we can be as a system to help our individual member libraries be the best they can be. This means doing all the necessary work "behind the scenes," including maintaining a solid infrastructure, ensuring fiscal sustainability, engaging and maintaining the highest quality staff possible, implementing numerous and varied communication channels targeted to our different types of libraries, and modeling innovative and best practices for all members.

Objective: Fully communicate and engage with members from all types of libraries throughout the RAILS area to ensure they are aware of system programs/services of benefit to them and to better understand, anticipate, and meet their needs

- Continue to promote RAILS programs/services via a variety of communication vehicles and methods
- Find additional ways to engage academic, school, and special libraries to make them aware of RAILS programs/services of specific benefit to them
- Continue to exhibit at a variety of library-related conferences

- Continue to visit RAILS member libraries of all types
- Find ways to engage libraries with RAILS in addition to individual library visits
- Continue to enhance RAILS social media efforts
- Continue to gather feedback from all types of libraries on how RAILS can most effectively engage with members and help them engage with each other

Objective: Continue to evaluate RAILS programs/services to ensure that they are meeting member needs

- Continue to seek member feedback via surveys, during individual member encounters, and via other means
- Continue to perform in-depth evaluations of different RAILS program/services to ensure that they are meeting program goals and are having an impact on RAILS member libraries
- Implement changes to select programs/services as a result of evaluation activities

Objective: Ensure that the RAILS Board is engaged, representative of the system membership, and that new board members receive a thorough and effective orientation to the system

- Continue to grow and develop board orientation efforts
- Continue to grow and develop board engagement efforts
- Continue to strive for representation on the board from all areas of the system
- Continue to strive for more diversity on the RAILS Board

Objective: Continuously strive for organizational excellence by being an organization that is agile, future oriented and member-focused

- Continue researching and implementing new methods and best practices for attracting, developing, and retaining a superb staff team
- Encourage and support staff professional development activities

Objective: Maintain a robust technology infrastructure to support RAILS operations, member services, and member communication efforts

Objective: Ensure financial sustainability for RAILS

- Continuously monitor state funding and RAILS' expenditures and financial position

- Investigate and find efficiencies and cost savings for RAILS operations wherever possible
- Closely monitor RAILS investments and make changes as appropriate
- Advocate for continued system funding and provide talking points to help members advocate for continued funding as necessary

Objective: Provide excellent stewardship of RAILS financial resources to ensure maximum benefit to member libraries, library users, and Illinois taxpayers

- Continuously look for ways to use system funding more effectively
- Practice transparent government and management
- Align financial goals with organizational goals
- Participate in activities to help Illinois libraries manage their resources more effectively
- Make changes to RAILS facilities as possible to further reduce RAILS' physical footprint

Objective: Maintain a research and development role to provide leadership and innovation to help members provide the best possible service to their customers

- Encourage experimentation and development of projects that will help move libraries forward
- Support in any way possible new ideas and experiments that will help provide better service to Illinois library users
- Develop and model new projects to strengthen individual libraries of all types
- Publicize best practices and model innovative projects to all RAILS members

RAILS mission is to push us.
Kewanee listening tour comment

RAILS is an example of good consolidation.
Indian Trails Public Library District listening tour comment