



Northeast Ohio  
Regional  
Library System

School | Public | Academic | Special  
*Maximizing Library Potential Together*

Strategic Plan  
July 2022 through June 2025

Approved by the Board of Trustees on June 21, 2022

## Introduction

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The Northeast Ohio Regional Library System (NEO-RLS) is a multi-type library consortium bringing together a wide variety of talents and resources to maximize library potential throughout the 22-county region. While partially funded through the State of Ohio, NEO-RLS is heavily dependent on the membership dues paid by public, academic, special, and school library members, as well as fees for services. The staff of NEO-RLS provides high quality training, professional development opportunities, and services that meet the varying needs of regional members.

The 2019-2022 NEO-RLS strategic plan focused on increasing membership awareness, involvement, and leadership opportunities. This was accomplished through the establishment of new board committees and Advisory Groups together with the provision of new and relevant educational content in an expanded number of enhanced formats. In addition, the organization focused on continuing financial stability and succession planning in order to ensure long-term sustainability.

The 2022-2025 strategic plan builds on the current strength of the organization by employing new strategies for efficiency, expanding funding sources, and continuing as a desirable employer. Of the utmost importance is the commitment to creating an environment of diversity, equity, inclusion and accessibility in which members, board, and staff feel valued and respected and have access to a wealth of relevant educational opportunities representing different viewpoints and experiences. In addition, the plan proposes to grow new member services in response to identified member needs. The goals, objectives, and action items delineated in the plan serve to fulfill the mission, further the vision, and adhere to the values of the Northeast Ohio Regional Library System. *Together we are maximizing library potential.*

## The Process

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The NEO-RLS Board of Trustees embarked on the strategic planning process in a four hour Board Retreat in October, 2021. The mission and values were modified during the retreat along with the establishment of the overarching goals. The NEO-RLS staff held a four hour retreat in December to look at the goals through five library-specific perspectives: members, staff, internal process, organizational resources, and financial resources. The themes that emerged were used to form the objectives under each goal. The staff then met several times to construct the various action items under each objective.

## The Participants

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### ***Board of Trustees***

CJ Lynce, *President*

Teanna Weeks, *Vice President/President-Elect*

Laura Leonard, *Secretary*

William Rutger, *Past President*

Michelle Alleman

Mariana Branch

Leslie Cade

Kris Carroll

Andrea Legg

Melissa Mallinak

Melanie McGurr

Trent Ross

Amy Switzer

Eric Taggart

Joy Walk

### ***NEO-RLS Staff***

Betsy Lantz, *Executive Director*

Debbie Blair, *Fiscal Officer*

Melissa Lattanzi, *Continuing Education Coordinator*

Ragan Snead, *Continuing Education Coordinator*

## **Our Mission**

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NEO-RLS provides high-quality, high-value, staff and organizational development opportunities and dynamic collaborative possibilities, to the diverse Northeast Ohio library community.

## **Our Vision**

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NEO-RLS is the catalyst for maximizing library potential.

## **Our Values**

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### **Member Focused**

We are committed to serving our members with the highest standards of respect, integrity, honesty, communication, and confidentiality. We are committed to maximizing member benefits through good stewardship.

### **Proactive**

We are committed to providing innovative and sustainable services and learning opportunities that allow the libraries and library staff in our region to perform exceptionally and remain at the forefront of the profession.

### **Inclusive**

We are committed to creating and supporting a fair and healthy, high-performing community by ensuring equitable access to resources and opportunities to all. We enable individuals and groups to feel safe, respected, engaged, motivated, and valued for who they are and for their contributions.

### **Collaborative**

We are committed to collaboration as the key to serving all of the library types in our region.

## Our Future: Strategic Goals

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- Cultivate a culture of continuous organizational development and fiscal sustainability.
- Embed best practices for diversity, equity, inclusion and accessibility (DEIA) in all that we do.
- Design and promote innovative and timely educational opportunities.
- Grow new member services.

### Goal 1

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#### **Cultivate a culture of continuous organizational development and fiscal sustainability.**

*Outcome: Every library in the region is a paid member of NEO-RLS and members recognize NEO-RLS' excellent stewardship of membership monies through observable organizational efficiency and effectiveness. The region's library staff are engaged in the organization through their participation in programs, Advisory Groups, Board Committees and the Board of Trustees. NEO-RLS has expanded avenues of funding in order to achieve long-term fiscal sustainability and is viewed as a desirable employer.*

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#### **Objectives and Action Items:**

##### **1. Increase organizational efficiency.**

- ❖ Explore new software for operations and marketing (4<sup>th</sup> quarter FY2022-2023)
- ❖ Review the use of current subscription services for items such as virtual platforms, stock photos, and presentation templates (3<sup>rd</sup> quarter FY2022-2023)
- ❖ Upgrade staff technology according to the NEO-RLS Technology Plan (Ongoing)
- ❖ Investigate the viability of a new Membership Management System (FY2023-2024)

**2. Build increased membership involvement.**

- ❖ Design and implement an educational program for members regarding Board activities, Board nomination and election process and Board Committee and Advisory Group participation (4<sup>th</sup> quarter FY2022-2023)
- ❖ Establish a rationale for administrators that encourages employee leadership growth through engagement as CE presenters, Committee and Advisory Group members (4<sup>th</sup> quarter FY2022-2023)
- ❖ Develop a membership recruiting video/podcast (1<sup>st</sup> quarter FY2022-2023)
- ❖ Create a campaign to regularly promote individual memberships state-wide and nationally (2<sup>nd</sup> quarter FY2022-2023)
- ❖ Focus on in-person library visits (2<sup>nd</sup> quarter each FY)
- ❖ Incorporate discussion and voting on Bylaw changes into Membership Meeting (FY2023-2024)
- ❖ Develop an annual “Maximize your Membership” campaign to promote the benefits of NEO-RLS membership (2<sup>nd</sup> quarter FY2022-2023)

**3. Expand funding sources.**

- ❖ Build a donor base for program sponsorship (2<sup>nd</sup> quarter FY2024-2025)
- ❖ Assess marketing mechanisms and timeframe for effectively promoting vendor discount program to membership (2<sup>nd</sup> quarter FY2022-2023)
- ❖ Expand and advertise vendor sponsorship opportunities beyond discount program (1<sup>st</sup> quarter FY2022-2023)
- ❖ Identify new grant opportunities for programs and events (2<sup>nd</sup> quarter FY2023-2024)

**4. Maintain fiscal health and strengthen staff work/life balance.**

- ❖ Increase consulting fees (FY2023-2024)
- ❖ Develop guidelines governing the amount of consulting per staff member (3<sup>rd</sup> quarter FY2022-2023)
- ❖ Move to work at home as a permanent option for staff (3<sup>rd</sup> quarter FY2022-2023)
- ❖ Create and employ intentional internship opportunities across all operational areas (1<sup>st</sup> quarter FY2023-2024)
- ❖ Add a part-time Administrative Assistant staff position (FY2024-2025)

## Goal 2

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### **Embed best practices for diversity, equity, inclusion and accessibility (DEIA) in all that we do.**

*Outcome: NEO-RLS staff, Board of Trustees, DEAI Strategies Committee, and other Board and Advisory Group members, are trained in DEIA best practices and adhere to known best practices for governance, management, programs and services. The Board of Trustees, Committee members and staff reflect the diversity of our region's library staff through the use of effective recruiting and hiring practices. NEO-RLS members feel welcomed, acknowledged, respected, safe, and valued when they engage with the organization. Educational opportunities reflect the diversity within our region's library staff by promoting a variety of speakers, viewpoints and experiences.*

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#### **Objectives and Action Items:**

##### **1. Focus on DEIA across all aspects of NEO-RLS operations.**

- ❖ Board President and Committee chairs ensure mandatory, on-going training for Board members, staff and DEIA Strategies and other Committee and Advisory Group members (1<sup>st</sup> quarter FY2022-2023 and ongoing)
- ❖ Integrate funds for DEIA goals into budget for items such as different modes of delivery, speaker fees, variety of venues, audit resources, and DEIA consultants (FY2023-2024 and FY2024-2025)
- ❖ Create strategies to identify diverse Board candidates and Committee members (1<sup>st</sup> quarter FY2022-2023)
- ❖ Train Board members to advocate for diverse member involvement through an intentional recruitment process (2<sup>nd</sup> and 3<sup>rd</sup> quarters each FY)
- ❖ Perform a marketing audit annually to ensure that all members are represented (4<sup>th</sup> quarter each FY)
- ❖ Utilize website accessibility software on an annual basis and make needed modifications (4<sup>th</sup> quarter each FY)

## **2. Employ a DEIA lens to strengthen learning opportunities.**

- ❖ Implement and maintain DEIA Resource pages on website (1<sup>st</sup> quarter FY2022-2023)
- ❖ Work with DEIA Strategies Committee to develop a criteria for examining the continuing education calendar through a DEIA lens (1<sup>st</sup> quarter FY2022-2023)
- ❖ Work with the DEIA Strategies Committee to create a diversified presenter list by capturing the ideas from diverse segments of members and staff (1<sup>st</sup> quarter FY2022-2023)
- ❖ Devise and include a DEIA element on all continuing education and membership surveys (1<sup>st</sup> quarter FY2022-2023)
- ❖ Seek outside funding for DEIA resources for members (FY2023-2024)
- ❖ Design and implement a plan to deliver all programs and services in an equitable and accessible manner (1<sup>st</sup> quarter FY2023-2024)

## **3. Evaluate DEIA initiatives to ensure accountability and success.**

- ❖ Review DEIA goals, objectives and action items at every staff meeting (Ongoing)
- ❖ Assign individual DEIA staff goals (4<sup>th</sup> quarter each FY)
- ❖ Develop a model for DEIA assessment (1<sup>st</sup> quarter FY2023-2024)
- ❖ Perform a biennial review and evaluation of all policies and procedures by the DEIA Strategies Committee (FY2023-2024)



## Goal 3

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### **Design and promote innovative and timely educational opportunities.**

*Outcome: Every library in the NEO-RLS region is aware of the wealth of programs and services provided by the organization and NEO-RLS is viewed as a significant contributor to the development and success of the region's library staff. NEO-RLS is known for being able to provide every type of program needed by our libraries and is the first stop for continuing education and professional development for all types of libraries within the region. Program content is current, varied, adheres to DEIA best practices and is searchable by track, competency, level and location. NEO-RLS is able to engage and compensate speakers fairly and programs are marketed effectively through a variety of platforms.*

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#### **Objectives and Action Items:**

##### **1. Create content and delivery methods relevant to all of the region's libraries.**

- ❖ Design a new process for regular evaluation of our content and delivery methods (3<sup>rd</sup> quarter FY2022-2023)
- ❖ Assess our content and delivery methods in relation to those of other similar organizations (1<sup>st</sup> quarter FY2023-2024)
- ❖ Conduct an annual needs survey (FY2022-2023 and FY2024-2025)
- ❖ Partner with the Kent State University iSchool on content creation (1<sup>st</sup> quarter FY2023-2024)
- ❖ Develop a technology kit evaluation schedule (1<sup>st</sup> quarter FY2022-2023)
- ❖ Implement new program certifications (e.g. IT, technology skills, etc.) (3<sup>rd</sup> quarter/4<sup>th</sup> quarter FY2022-2023)

##### **2. Market educational opportunities effectively throughout the region and beyond.**

- ❖ Implement approved Marketing Plan (1<sup>st</sup> quarter FY2022-2023)
- ❖ Prepare a plan to promote programming to Kent State University iSchool quarterly (1<sup>st</sup> quarter FY2022-2023 and ongoing)
- ❖ Develop a marketing campaign to regularly promote programs and events nationwide (1<sup>st</sup> quarter FY2022-2023)
- ❖ Expand and enhance communication within Network Groups (Ongoing)
- ❖ Increase targeted marketing of CE for academic, special and school library staff

## Goal 4

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### Grow member services.

*Outcome: NEO-RLS is viewed as proactive in the development of new and relevant services that directly benefit the libraries in our region. Libraries view NEO-RLS as a partner and feel free to communicate their ideas, challenges and needs for consideration in the development of innovative services.*

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### Objectives and Action Items

#### 1. Develop new services and collaborations that enhance member benefits for all library types in our region.

- ❖ Identify one new service per year to implement based on annual needs survey (4<sup>th</sup> quarter each FY)
- ❖ Develop new technology kits (2<sup>nd</sup> quarter FY2022-2023 and ongoing)
- ❖ Deploy the 2024 Statewide Salary Survey (3<sup>rd</sup> quarter FY2023-2024)
- ❖ Expand consulting services (4<sup>th</sup> quarter FY2022-2023)
- ❖ Create a database of speakers for member use (FY2024-2025)