

# PALS: A Program of Minnesota State Colleges and Universities Strategic Plan FY '16-18

## Strategic Plan FY '16-18

As of January 10, 2017

### Mission

#### What is our purpose?

- We focus on the technology so libraries can focus on their patrons.
- PALS promotes learning success by providing a comprehensive, tailored and cost-effective suite of information technology products and services for our libraries, their institutions and their patrons.
- PALS builds relationships and connections between libraries by facilitating opportunities for collaborative innovation
- **Through our work, knowledge grows**

### Values

#### What are the key guiding principles?

- We attain high levels of achievement by:
- Acting with integrity
  - Valuing open, honest, and respectful communication
  - Demonstrating competence and creativity through individual effort and teamwork

### Competitive Advantage

#### What do we do best?

- Staff expertise with large library systems and consortia
- Significant experience with open source software and communities
- Strong customer service orientation
- Non-profit organization

### Vision

#### Where are we going?

- By FY2019 the Consortium of MnPALS libraries will be operating on a comprehensive next generation library system replacing Aleph and supplemental systems with a single platform.
- Unified workflows for digital as well as physical content will bring staff efficiencies, while better reporting will allow data analytics to drive improved user services.
- A web-scale discovery system will be a core service for all MnSCU Libraries, while other libraries will have the option to participate.
- A new, simpler fee structure will bring comprehensive services to MnSCU libraries, while allowing maximum choice and flexibility for non-MnSCU institutions.
- PALS staff will continue to provide outstanding training, support and consultation to
- PALS Islandora services will become the Digital Asset Management system of choice for academic institutions and government agencies in Minnesota.
- PALS reputation and visibility will grow and we will be seen as an outstanding example of an effective and visionary library consortium office.

### Implementation

#### How do we keep on track?

- Weekly status updates and reminders to team leads
- Monthly reviews of progress by teams
- Monthly documentation of progress by team leads
- Monthly detailed review of sections of the plan at All-Staff meeting
- Quarterly updates to UC, EC, & System Director

### Goals and Objectives

#### Responsible Financial Management

##### 1 Provide cost-effective services to our diverse user community

- 1.1 Control costs through internal efficiency
- 1.2 Retain or increase Private Academic and Special Library Participation in Consortium
- 1.3 Adopt a User Fee structure for the Next Gen ILS
- 1.4 Broker Database Access beyond ELM as Appropriate

##### 2 Ensure financial viability

- 2.1 Ensure a surplus in the operating accounts in 2016
- 2.2 Prepare documents for MnSCU Decision Makers and Financial Officers
- 2.3 Maintain an Operation reserve of at least \$500k
- 2.4 Finance Next Gen ILS
- 2.5 Grow Islandora Revenue

#### Customer-focused Solutions

##### 3 Provide analytics that demonstrate the value of libraries within their organizations

- 3.1 Create VuFind Virtual Hosts for Libraries that want them
- 3.2 Deliver VuFind statistics (Piwik) to libraries on request
- 3.3 Deliver Islandora Statistics to customers
- 3.4 Form a consortia-wide task force to look at analytic needs of both the consortia and local libraries.

##### 4 Plan for and implement the Next Generation Integrated Library System

- 4.1 Hire a project manager
- 4.2 Track and deal with identified issues raised during the RFP process
- 4.3 Execute a Contract for the new Library System
- 4.4 Assist libraries in modernizing their data
- 4.5 Maintain a project plan.

- 4.6 Implement the NextGen ILS
  - 4.7 Communicate regularly with our libraries throughout the process
- ##### 5 Expand the scope of PALS Digital Asset Management and Institutional Repository (DAM/IR) services

- 5.1 Keep Islandora Current by installing Upgrades
- 5.2 Increase number of new Islandora partners
- 5.3 Strengthen current local Islandora community
- 5.4 Participate in and contribute to the Islandora international community
- 5.5 Market Islandora
- 5.6 Integrate Islandora with discovery layer
- 5.7 Export Islandora metadata to Digital Public Library of America via MDL
- 5.8 Propose Islandora for all MnSCU Institutions and MnSCU itself

#### Efficient and Effective Operations

##### 6 Provide a robust and secure information technology infrastructure

- 6.1 Migrate all Linux systems from old to new hardware
- 6.2 Replace all virtual servers running on VMWare with Linux Containers
- 6.3 Improve planning for migration to new Ubuntu server releases
- 6.4 Improve backups and business continuity
- 6.5 Improve systems tracking and service monitoring
- 6.6 Improve network and systems security

- 6.7 Improve automation of processes and system routines
- 6.8 Improve internal systems documentation

##### 7 Communicate effectively to ensure well-informed customers

- 7.1 Update and Improve PALS Web Site
- 7.2 Update and improve internal communication tools

##### 8 Ensure effective knowledge transfer

- 8.1 Plan for and Execute Knowledge transfer for Next Library System and approaching retirements

#### Staff Development, Communication & Identity

##### 9 Improve staff expertise and efficiency through professional development

- 9.1 Ensure every staff member participates in significant professional development every year
- 9.2 Target professional development towards the NGILS

##### 10 Demonstrate the value of PALS to customers and Minnesota State

- 10.1 Regularly document and publicize the ways PALS benefits customers
- 10.2 Publish usage statistics
- 10.3 Relate what we do to student success
- 10.4 Gather and publish stories from customers about why PALS is valuable

##### 11 Improve the visibility of PALS

- 11.1 Visit Customer Sites
- 11.2 Actively participate in statewide and national conferences
- 11.3 Publish articles
- 11.4 Build stronger recognition and support at MnSCU
- 11.5 Communicate effectively with DDC
- 11.6 Meet Annually with private higher ed deans
- 11.7 Meet with CALCO Libraries Annually