

# Yellowhead Regional Library

Plan of Service  
2003– 2006

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Table of Contents</b>	<b>Page</b>
INTRODUCTION	4
CORE BUSINESSES	
Automation Services	6-7
Bibliographic Services	
Allotment	8
Acquisitions	9
Cataloguing	10
Delivery	11
Circulating Blocks	12
Direct Member Services	13
Information Services	
Curriculum Support	14
Reference	15
Resource Sharing	
Direct ILL	16
Mediated ILL	17
Training & Development	18

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Table of Contents** **Page**

---

CORPORATE INITIATIVES

Governance	20-21
Staffing	22-23
Finance	24
Facility/Capital	25
Communications	26
Technology	27

## **Yellowhead Regional Library Plan of Service 2003-2006**

### **INTRODUCTION**

The Yellowhead Regional Library Plan of Service is the result of a Needs Assessment process that was begun in 2002. A series of surveys and interviews were conducted with stakeholders. Details of this process can be found in the Needs Assessment 2002 Final Report.

The Plan of Service is divided into two main sections. The first deals with Yellowhead Regional Library's "Core Businesses," or services provided to members. The second deals with "Corporate Initiatives," or those activities that enable the organization to provide the Core Businesses.

Each Core Business has one or more goals, with each goal having one or more strategies. The Corporate Initiatives section is divided into functional areas, each with several strategies. Each strategy has a timeline and a place for recording progress towards accomplishing the strategy.

The timeline for each strategy indicates whether the item is "ongoing", "as required" or has an anticipated completion date. Completion dates give the quarter and year in which they are expected to be accomplished. Quarters are indicated as Q1, Q2, Q3, or Q4. Those strategies that have a completion date beyond 2005 only indicate the year in which the action is required.

Core Businesses and Corporate Initiatives also identify the current resources, both financial and staff, which are required for the given area to operate. The information for the financial resources is drawn from the Service Costings, further details of which are available in the Needs Assessment Final Report. It is important to note that the figures were based upon 2002 budget figures, and that they will change over the life of the Plan.

The staff resources identified were those resources assigned to the various areas in 2002. The number of staff assigned is expressed in full time equivalents, or FTE's. One FTE equates to one staff member working 1,950 hours per year (based on 7.5 hours per day or 37.5 hours per week). As with financial resources, it is expected that the number of FTE's will change over the life of the Plan.

Progress towards achieving strategies in the Plan will be reviewed by staff on an ongoing basis. The Service Committee will also review that progress at least annually, and will report on it to the Executive Committee and Board.

**Yellowhead Regional Library  
Plan of Service 2003-2006**



**CORE BUSINESSES**

Automation Services  
Bibliographic Services  
Circulating Blocks  
Direct Member Services  
Information Services  
Resource Sharing  
Training & Development

## Yellowhead Regional Library Plan of Service 2003-2006

### Core Business: Automation Services

#### Current Resources:

Financial  
\$202,862

Staff  
4.00 FTE

**Goal 1,** Provide and support the ILS<sup>1</sup> that is used by all member public libraries.

Strategies	Timelines	Progress
1. Provide training and workshops to member library staff.	Ongoing	
2. Investigate, with TRAC <sup>2</sup> partners, the implications of connecting to the Supernet.	Q2, 2004	
3. Investigate upgrading, with TRAC partners, the current ILS from Dynix to Horizon and/or replacing the current server.	Q4, 2003	
4. Investigate, with TRAC partners, purchasing additional modules or functionality for the ILS (for example, enriched content, media booking, community resources, patron self-checkout, Cybrarian, TRACpac <sup>3</sup> enhancements)	As required	
5. Investigate, with TRAC partners, expanding TRAC to include other partners.	Q4, 2003	
6. Support the TRAC central systems department according to the terms of the contract with TRAC.	Ongoing	

<sup>1</sup> ILS – Integrated Library System

<sup>2</sup> TRAC – The Regional Automation Consortium

<sup>3</sup> TRACpac – TRAC public access catalogue

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Automation Services (continued)</b>
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**Goal 2,** Enhance the ability of YRL member libraries to meet the goals of their technology plans.

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Investigate implications of Supernet for the YRL service model for technical support.	Q2, 2004	
2. Work with APLEN <sup>1</sup> and Industry Canada on the implementation of CAP <sup>2</sup> III.	Q4, 2003	
3. Investigate alternate service models for schools to use the ILS.	2006	
4. Work with APLEN on the implementation of the Web Template Project.	Q3, 2004	
5. Investigate additional services made possible by the Supernet (voice over IP, video conferencing, etc.)	As required	

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<sup>1</sup> APLEN – Alberta Public Library Electronic Network

<sup>2</sup> CAP – Community Access Project

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Bibliographic Services</b>
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**Goal 1, Allotment:**        Supply a budget for the purchase of library materials.

**Current Resources:**

Financial  
\$308,745

Staff  
0.00 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Investigate increasing the allotment, should additional revenue become available.	As required	
2. Encourage members to purchase additional allotment instead of doing special purchases.	Ongoing	
3. Identify options for changing the school allotment.	As required	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Bibliographic Services (cont'd)</b>
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**Goal 2, Acquisitions:** Place orders for materials selected by member libraries.

**Current Resources:**

Financial  
\$140,256

Staff  
2.55 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Continue to assess turnaround times.	Ongoing	
2. Investigate implementation of the Selections function in Horizon.	Q1, 2005	
3. Implement the EDIFACT <sup>1</sup> standard for electronic ordering in Horizon.	Q1, 2005	
4. Review the ability of members to access account and order information in Horizon.	Q1, 2005	

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<sup>1</sup> EDIFACT – Electronic Data Interchange For Administration, Commerce, Transport

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Bibliographic Services (cont'd)</b>
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**Goal 3, Cataloguing:** Create and maintain a bibliographic database of items held by member libraries.

**Current Resources:**

Financial  
\$206,759

Staff  
3.75 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Continue to correct bibliographic and authority records, with TRAC partners, as resources become available.	Ongoing	
2. Investigate alternate methods of making MARC <sup>1</sup> records available to school libraries.	Q4, 2003	
3. Continue to assess turnaround times.	Ongoing	

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<sup>1</sup> MARC records – Machine Readable Cataloguing records

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Bibliographic Services (cont'd)</b>
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**Goal 4, Delivery:** Deliver/pick-up library materials to/from member libraries.

**Current Resources:**

Financial  
\$64,981

Staff  
1.40 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Review site delivery.	Q3, 2004	
2. Review frequency and method of delivery.	Q3, 2003	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Circulating Blocks</b>
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**Goal:** Provide additional materials to supplement local library collections.

**Current Resources:**

Financial  
\$79,861

Staff  
1.25 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Review collection use by public library patrons.	Q1, 2004	
2. Create the method for determining use of collection by students in school libraries.	Q3, 2003	
3. Investigate using the Floating Collections function.	Q1, 2004	
4. Review the purpose and size of the collection, including the number and mix of block types.	Q3, 2004	
5. Continue to assess the collection to ensure it meets the needs of YRL member libraries.	Ongoing	
6. Update the relevant sections of the Collection Development Guidelines.	Q3, 2003 and Q3, 2004	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Direct Member Services</b>
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**Goal:** Facilitate member library participation in cooperative initiatives.

**Current Resources:**

Financial  
\$32,198

Staff  
0.10 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Raise awareness with member library staff and the public of TAL <sup>1</sup> and its initiatives, including Subscriptions Alberta, TAL Card, TAL Online, and AAQ <sup>2</sup> .	Ongoing	
2. Raise awareness with member library staff and the public of the Alberta Audio Book Consortium (AABC), International Collection Consortium and Summer Reading Program.	Ongoing	
3. Evaluate whether money for purchase of AABC materials is adequate.	Q3, 2003 and annually thereafter	
4. Investigate making AABC materials a circulating block type.	Q3, 2004	

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<sup>1</sup> TAL – The Alberta Library

<sup>2</sup> AAQ – “Ask A Question” (Virtual Reference Service)

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Information Services</b>
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**Goal 1, Curriculum Support:** Provide materials to supplement local school libraries' curricular resources.

**Current Resources:**

Financial  
\$59,789

Staff  
0.60 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Review whether quota level is appropriate.	Q2, 2004	
2. Begin promoting the service to school librarians, teachers and administrators.	Q3, 2003, then ongoing	
3. Evaluate the collection to ensure it can meet a changing curriculum.	Q3, 2004	
4. Update relevant sections of Collection Development Guidelines.	Q3, 2003 and Q3, 2004	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Information Services (continued)</b>
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**Goal 2, Reference:** Provide information or materials on a particular subject in response to a patron request.

**Current Resources:**

Financial  
\$40,604

Staff  
0.50 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Participate in AAQ.	Ongoing	
2. Review the purpose of the HQ Reference and Non-Fiction collection.	Q3, 2004	
3. Promote the reference service, including AAQ, to member and contract library staff and the public.	Ongoing	
4. Update relevant sections of Collection Development Guidelines.	Q3, 2003 and Q3, 2004	
5. Provide reference support to Northern Lights Library System (NLLS) member libraries according to the terms of the contract with NLLS.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Core Business: Resource Sharing**

**Goal 1, Direct ILL<sup>1</sup>:** Compensate member libraries for participating in resource sharing.

**Current Resources:**

Financial  
\$44,338

Staff  
0.10 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Develop guidelines for submitting postage claims.	Q4, 2003	
2. Develop, with TRAC partners, operational guidelines governing the sharing of resources.	Q3, 2003	
3. Evaluate, with TRAC partners, the number of cloth ILL bags required and purchase more if necessary.	Q3, 2003	
4. Monitor postage reimbursement expenses.	Ongoing	

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<sup>1</sup> ILL – Inter-library Loan

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Resource Sharing (continued)</b>
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**Goal 2, Mediated ILL:** Facilitate ILL requests for materials to which patrons do not have direct access.

**Current Resources:**

Financial  
\$104,893

Staff  
1.60 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Participate in provincial resource sharing initiatives.	Ongoing	
2. Investigate the use of the RSS <sup>1</sup> web form by member library staff.	Q1, 2004	
3. Encourage resource sharing by school libraries.	Ongoing	
4. Develop, with TRAC partners, operational guidelines governing the sharing of resources.	Q3, 2003	

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<sup>1</sup> RSS – Resource Sharing System

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Core Business: Training &amp; Development</b>
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**Goal:** Provide workshops, seminars, tutorials or assistance on library related issues to member library staff or board members.

**Current Resources:**

Financial  
\$150,694

Staff  
2.00 FTE

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Evaluate the current service model.	Q2, 2004	
2. Offer workshops in different geographic areas.	As required	
3. Assess the viability of developing a series of training modules using appropriate distance education software.	Q1, 2005	
4. Encourage effective use of YRL services by member library staff.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**



**CORPORATE INITIATIVES**

- Governance
- Staffing
- Finance
- Facility/Capital
- Communications
- Technology

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Corporate Initiatives**

**Current Resources:**

Financial  
\$230,602

Staff  
3.40 FTE

**Governance**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Maintain a continuous planning process:		
a) Review the Plan of Service annually.	Q3, 2004 Q3, 2005 Q3, 2006	
b) Conduct a Needs Assessment every 3 years.	2006	
c) Conduct risk/opportunity assessments as appropriate.	As required	
2. Review policies as necessary:		
a) Establish a schedule for policy review.	Q4, 2003	
b) Review the Human Resources Manual at least annually with representatives of the Staff Association.	Q2, 2004 Q2, 2005 Q2, 2006	
c) Establish a policy with regard to compliance with the spirit and terms of the System Municipal Agreement and School Board Participation Agreement.	Q2, 2004	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Corporate Initiatives (continued)</b>
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**Governance (continued)**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
3. Review Board and Committee Structure:		
a) Appoint committee members at the Board Organizational meeting.	Annually	
b) Investigate options for Board representation in light of the number of summer villages and recommend a course of action.	2006	
4. Provide opportunities for ongoing trustee training:		
a) Cooperate with the Alberta Library Trustees Association in offering trustee training for member library trustees.	As required	
b) Provide opportunities for trustee training at regular Board meetings.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Corporate Initiatives (continued)</b>
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**Staffing**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Ensure appropriate staffing levels to meet service needs. Particular areas to review include:		
a) Bibliographic Services taking into consideration reduced volumes.	Q2, 2004	
b) Training & Development in response to changing expectations and increased membership.	Q2, 2004	
c) Administrative support given increased expectations.	Q4, 2003	
d) Management in light of external obligations arising from the active participation in cooperative initiatives.	Q4, 2003	
2. Re-allocate staff between areas based on service needs.	As required	
3. Continuously monitor and evaluate structure of work teams.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Corporate Initiatives (continued)**

**Staffing (continued):**

Strategies	Timelines	Progress
4. Develop strategy for professional development for staff.		
a) Clarify expectations for staff attendance at ALC.	Q1, 2004	
b) Evaluate resources directed towards professional development for professional and support staff.	Q3, 2003	
c) Investigate options, both traditional and non-traditional, for professional development for professional and support staff.	Q1, 2004	
5. Review job descriptions for work team members, including qualifications, classifications and compensation.	Q2, 2004	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Corporate Initiatives (continued)</b>
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**Finance**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Maintain funds (reserves) at appropriate levels:		
a) Review the policy regarding funds (Policy 10.9)	Q2, 2004	
b) Determine priorities for transfers between funds	Q2, 2004	
2. Investigate creating more comprehensive management reports using Accpac's report writing function.	Q4, 2004	
3. Explore interoperability between the ILS and Accpac.	Q4, 2004	
4. Maintain up-to-date information on the cost of YRL services.	Ongoing	
5. Ensure contracts are appropriately priced taking into account the cost of service and YRL policy.	As required	
6. Develop a strategy to deal with the implications of membership withdrawals or contract cancellations.	As required	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

<b>Corporate Initiatives (continued)</b>
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**Facility/Capital**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Ensure facility is appropriately maintained, in particular:		
a) Carpet replacement	Q3, 2005	
b) Paint	Q3, 2005	
c) Phone system	2006	
d) Review HVAC support contract	Q4, 2003	
2. Maintain an up-to-date Capital Asset Replacement Guide.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Corporate Initiatives (continued)**

**Communications**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Raise awareness of YRL by:		
a) Promoting YRL services to members	Ongoing	
b) Regular communication with member jurisdictions	Ongoing	
2. Advocate on behalf of YRL and its members to:		
a) Provincial government	As required	
b) AUMA	As required	
c) AAMD&C	As required	
d) Federal government	As required	
3. Maintain adequate documentation for member library staff to effectively use YRL services.	Ongoing	

**Yellowhead Regional Library  
Plan of Service 2003-2006**

**Corporate Initiatives (continued)**

**Technology**

<b>Strategies</b>	<b>Timelines</b>	<b>Progress</b>
1. Ensure appropriate utilization of technology:		
a) Investigate implementing Voice over IP telephony	Q4, 2004	
b) Review requirements for LAN <sup>1</sup> and workstations	Q3, 2003	
c) Investigate, with TRAC partners, the level of Supernet connectivity required.	Q2, 2004	
d) Monitor Supernet developments for implications for YRL operations.	Ongoing	
2. Ensure the software infrastructure remains current.	Ongoing	
3. Develop and implement a web strategy	Q1, 2004	

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<sup>1</sup> LAN – Local Area Network