

**NEOS Strategic Plan
2008 – 2011**

**Approved by NEOS Directors
November 30, 2007**

Goals, Strategies, and Key Initiatives

Goal 1: NEOS clients have easy access to available information resources.					
Strategy 1a: Streamlining the clients' experience in accessing resources					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Strategy to address high priority barriers to access:		2008 – 2009		Improved access to resources	
<ul style="list-style-type: none"> A prioritized list of the barriers to access from the clients perspective 	NEOS Manager	2008 – 2008	H		
Report on next generation PAC technology	Technology Advisory Group	2008 – 2008	H	Decision by NEOS Directors about NEOS' role in next generation PAC technology	

Goal 1: NEOS clients have easy access to available information resources.					
Strategy 1b: Increasing the number of library collections available to clients					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Single shared Integrated Library System for all NEOS members	Executive	2008 – 2008	H	All NEOS members share the ILS.	
A formal strategy for approaching potential member libraries		2009			

Goal 2: NEOS clients' library experience is optimized through the skills, knowledge, and attitude of member libraries' staff.					
Strategy 2a: Enhancing skills of member libraries' staff					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
A minimum of 2 workshops based on relevance and interest of frontline staff:				Level of participant satisfaction with workshop.	
<ul style="list-style-type: none"> Customer service training 	Continuing Education Committee with support of NEOS Manager	2008 – 2008	M	Application of new knowledge and skills by participants.	
<ul style="list-style-type: none"> Information and/or training on licenses 	Continuing Education Committee with support of NEOS Manager	2008 – 2008	H		
Evaluation report and recommendation about the format and frequency of the mini-conference	Continuing Education Committee with support of NEOS Manager	2008/ early 2009	H	Decision made regarding the frequency and format of the mini-conference.	

Goal 2: NEOS clients' library experience is optimized through the skills, knowledge, and attitude of member libraries' staff.					
Strategy 2a continued: Enhancing skills of member libraries' staff (continued)					
Key Initiatives	Primary Responsibility	Begin/Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Updated formal orientation packages for:					
<ul style="list-style-type: none"> New Executive members 	NEOS Manager with support of Executive	2008 – 2008	H	New members have the information that they need to do their job.	
<ul style="list-style-type: none"> New directors of member libraries 	NEOS Manager with support of Executive	2008 – 2008	M		
<ul style="list-style-type: none"> New member libraries 		2009			
<ul style="list-style-type: none"> New Committee Chairs 		2009			

Goal 2: NEOS clients' library experience is optimized through the skills, knowledge, and attitude of member libraries' staff.					
Strategy 2b: Sharing expertise within NEOS					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Plan for onsite visits to NEOS member libraries by staff from other NEOS member libraries		2009		Increased knowledge and appreciation of other member libraries and their processes by NEOS member library staff	
Expertise directory of knowledge and skills of NEOS directors and their staff		2010			

Goal 3: The NEOS community is knowledgeable about and supportive of NEOS, its members, its role, and its services.					
Strategy 3a: Providing clear, timely, and relevant information to the NEOS community					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
An updated, operational, and stable website that includes: <ul style="list-style-type: none"> • Current minutes and meeting packages • Current calendar of events • Policies and procedures • Contact information 	NEOS Manager with support of Communications Committee	2008 – 2008	H	The NEOS community has access to current NEOS information. The NEOS community is satisfied with the NEOS information that they receive.	
FAQs abut NEOS	NEOS Manager with support of Communications Committee	2008 – 2008	M		
Brochure/handout/ information pamphlet for staff and clients		2009			
Updated communication guidelines	Communications Committee	2008	H		

Goal 3: The NEOS community is knowledgeable about and supportive of NEOS, its members, its role, and its services.					
Strategy 3b: Clarifying NEOS' internal and external relationships					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Recommendation to the Directors regarding NEOS membership in TAL	Membership and Alliances Advisory Group	2008 – 2008	M	Decision is made about TAL membership.	

Goal 3: The NEOS community is knowledgeable about and supportive of NEOS, its members, its role, and its services.					
Strategy 3c: Recognizing and celebrating the contributions of NEOS member libraries' staff					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Recognition event and policies: <ul style="list-style-type: none"> • Mini-conference • Contributions to NEOS by its Members, such as: <ul style="list-style-type: none"> - Retiring directors - Outgoing Committee Chairs and Members - Outstanding contributions 				People readily volunteer for NEOS.	
	Recognition Task Force with support of NEOS Manager	2008 – 2009	H	Individuals are and feel acknowledged for their contributions to NEOS.	
	Recognition Task Force with support of NEOS Manager	2008 – 2009	L	Immediate supervisors of NEOS volunteers are aware of their staff members' contributions to NEOS.	
Website announcements of professional achievements by NEOS Members and their staff		2009			

Goal 4: The NEOS structure supports the NEOS mission.					
Strategy 4a: Defining roles and responsibilities throughout NEOS					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
<p>Redesigned organizational structure that clearly defines roles and responsibilities. This includes:</p> <ul style="list-style-type: none"> • Governance documents/Charter • Terms of Reference for Working Groups • Policies for roles and responsibilities: <ul style="list-style-type: none"> - Member libraries - Frontline staff - Directors - Committee chairs/members - NEOS manager • Organizational chart • MOU 	Governance Advisory Group			Directors approve new governance structure.	
		Spring Directors meeting 2008	H		
		Fall Directors meeting 2008	H		
		July 2008 – December 08	H		
		2008 – 2008	H		
		2009			

Goal 4: The NEOS structure supports the NEOS mission.					
Strategy 4a: Defining roles and responsibilities throughout NEOS (continued)					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Celebration of redesigned organizational structure	Communications Committee	2008 – 2009	M	15 th Anniversary celebration	

Goal 4: The NEOS structure supports the NEOS mission.					
Strategy 4b: Defining the role of the University of Alberta within NEOS					
Key Initiatives	Primary Responsibility	Begin/ Complete	Priority Ranking for 2008 Initiatives (H, M, L)	Success Indicators	Updates
Fact sheet explaining relationships between UofA and NEOS. UofA as: <ul style="list-style-type: none"> • Employer of NEOS Manager • Member of NEOS • ILSA 	Governance Advisory Group	2008	H	Positive and clear working relationship between NEOS and UofA	
Revised NEOS Manager roles & responsibilities and lines of accountability in alignment with policies of hosting library	Executive, with support of Governance Advisory Group	2008	H		
Clause in MOU redefining lines of accountability that incorporate the written description	Executive	2009			