NASIG Strategic Plan

2017-2021

June 2017

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Introduction

Over the past few years, NASIG's scope has broadened from serials-only to include electronic resources, and, more recently, scholarly communications. In light of this, NASIG changed its mission and vision to reflect this broader perspective in 2014, followed by the name change from North American Serials Interest Group to NASIG in early 2015. The Board selected the tagline of "Transforming the Information Community" after much discussion and input from the membership. Once that groundwork was established, the next step was to determine how best to reposition ourselves for this new direction.

In 2015, NASIG established the Financial Planning Task Force to take a long-term view of NASIG's finances, set benchmarks and timelines, and to establish financial goals for the next five years. However, given that our last strategic plan expired in 2010, it was really time for a full strategic planning session. In January 2016, former NASIG President October Ivins (1994/95) worked with the NASIG Executive Board for a full day of strategic planning. Many good ideas came out of that session, and several of them have already been implemented. The Board appointed a Strategic Plan Implementation Task Force to draft the final strategic plan for the remaining items.

NASIG Strategic Plan Implementation Task Force:

Joyce Tenney, Chair
Virginia Bacon Martin
Carol Ann (Borchert) Davis
Kittie Henderson
Betsy Hughes
Steve Kelley
Angie Thorpe

NASIG Vision & Mission

NASIG VISION

NASIG is an independent organization working to advance and transform the management of information resources. Our ultimate goal is to facilitate and improve the distribution, acquisition, and long-term accessibility of information resources in all formats and business models.

[Adopted 11/10/2014]

NASIG MISSION

There are three key components to NASIG's mission:

- NASIG *supports* a dynamic community of professionals including, but not limited to, librarians, publishers, and vendors engaging in understanding one another's perspectives and improving functionality throughout the information resources lifecycle with an emphasis on scholarly communications, serials, and electronic resources.

- NASIG *provides* a rich variety of conference and continuing education programming to encourage knowledge sharing among its members and to support their professional and career development.

- NASIG *promotes* the development and implementation of best practices and standards for the distribution, acquisition and long-term accessibility of information resources in all formats and business models throughout their lifecycle. In addition to developing best practices, NASIG supports the development of standards by NISO, an affiliated organization.

NASIG: The Environment

In 2010, then-President Rick Anderson recognized that we were due for strategic planning, but the organization and its environment were in flux at that time. The environment could have developed in several different directions, so instead the NASIG Executive Board opted to do contingency planning. At that time, most of NASIG's income was dependent on the conference, and we did not have enough in reserves at that time to survive an event that could result in cancellation of or significantly reduced attendance at the conference. The nation was in an economic downturn, and NASIG was encountering new competition from conferences like Electronic Resources in Libraries and the Charleston Conference. The contingency planning revolved around 4 priority scenarios:

- Conference becomes less relevant
- Audience preferences change
- Economy remains stable or worsens
- Demographic shift in potential and existing membership

The economy has improved in recent years, and NASIG has implemented webinars and developed relationships with sponsors who support the conference each year. The conference content has expanded into electronic resources and scholarly communication and now supports and promotes the management of information resources in all formats and publishing models. We remain true to our original serials roots, but serials have moved into an electronic arena, in fee-based, hybrid, and open access publishing models. Librarians are now both customers and, in many cases, publishers. This is a dynamic and exciting time in the profession, and NASIG has generated good publicity based on its Core Competencies for Electronic Resources Librarians. A similar project is currently underway for Scholarly Communications Core Competencies. As library publishing and scholarly communications become hot topics in the profession, we must continue to balance the new mission and vision with our roots in traditional serials management. That said, NASIG continues to be known as a serials-only organization, and we must educate our colleagues outside of NASIG about what the organization has to offer today beyond "just serials."

Strategic direction #1: NASIG will revitalize its marketing approach to reflect its new mission and vision.

Intent:

NASIG must revitalize its marketing approach. We need to educate members of the information community that we have changed with the recent revision of our Vision and Mission Statements and show how NASIG might be the place for them. We need to attract and retain new members to keep the organization fresh, and that begins with attracting them.

Key Actions:

1. Develop an elevator pitch to provide a consistent message of what NASIG is and does.
2. Review the marketing plan proposed by NonProfit Help and implement as appropriate, including a social media component. This could include co-sponsorship of local conferences with a NASIG presence on-site.
3. Work on improving the NASIG website to make it easier to use and find valuable content.
4. Broaden outreach to students (see also Strategic Direction #2).

The following critical success indicators will mark achievement in Strategic Direction #1:

- The web pages will be updated and revised to highlight important content, be easier to navigate, and showcase a more modern look overall.
- Professionals outside of NASIG will be more familiar with what NASIG has to offer.
- Conference attendance and membership numbers will increase over time.
- NASIG will have a more notable presence on social media, as shown in greater number of followers, likes, retweets, etc.

Responsible people/groups:

- NASIG Executive Board
- Marketing and Social Media Coordinator
- Communications Committee
- Web-Based Infrastructure Task Force (pending appointments)

Strategic direction #2: NASIG will expand student outreach and mentoring.

Intent:

After new members are attracted to NASIG through our marketing efforts, we need to retain them. NASIG must develop ways to expand mentoring of new members and to further reach out to the SLIS student bodies which will provide new members of the information community, and future potential members.

Key Actions:

1. NASIG will provide mentorships to students and to professionals both at early stages and throughout their career.
2. NASIG will offer students the opportunities to serve on committees.
3. NASIG will offer more outreach to schools, including online videos, in-person workshops, and road shows.

The following critical success indicators will mark achievement in Strategic Direction #2:

- NASIG will offer a year-long mentoring program, initially for students, but later for other professionals, in addition to the conference mentoring.
- The Vice President will make a specific effort to ensure student members will be assigned to selected committees in order to offer professional networking and committee service experience.
- SOC ambassadors and Board members will visit library schools in person or virtually to speak with students, possibly in conjunction with a Student Ambassador at the school. This may take the form of online videos at a later date.

Responsible people/groups:

- Student Outreach Committee
- Mentoring Group
- NASIG Executive Board

Strategic direction #3: NASIG will find the optimum balance between paid staff and volunteer work.

Intent:
NASIG needs to find the correct balance between paid-for staffing and work performed by professional volunteers on committees. As NASIG matures, the responsibilities and structure of committees must be reviewed and possibly revised.

Key Actions:

1. Improve long-term record keeping to better track the financial needs and inflows/outflows of the organization.
2. Hire part-time assistance or outsource specific items, including use of consultants for a specific purpose or project, such as marketing or managing the website.
3. Develop a committee toolkit to provide clear expectations to committee members of what they should be doing.
4. Do an organization-wide review of committees every 5 years to determine which committees are still needed, which should be added, and whether the number of people on the committee is sufficient.
5. Add a paid position to the Continuing Education Committee to assist with long-term consistency.

The following critical success indicators will mark achievement in Strategic Direction #3:

- NASIG will begin outsourcing particular items to add expertise not held by members and to alleviate the volunteer burden.
- Evaluation and Assessment will conduct a review of all committees every five years to provide feedback for the Board to make decisions on committee structure.
- Committee chairs and members will have an online toolkit to help orient them on what they need to be doing. This will be a significant upgrade from the current orientation and chairs manuals online.
- A long-term paid position will be added to the Continuing Education Committee. Duties for that position will be outlined by CEC and the Vice President.

Responsible people/groups:

- Evaluation and Assessment
- NASIG Executive Board
- Continuing Education Committee

Strategic direction #4: NASIG will be involved in creating new content to add to the body of scholarly work.

Intent:

NASIG should be involved in creating new content to add to the body of scholarly work, starting with webinars and guides, but possibly moving into larger projects with broader impact. This would include making the organization's main intellectual content, the conference, available remotely.

Key Actions:

1. Stream and/or provide recordings of sessions from the annual conference on a cost recovery basis to develop a stronger virtual presence and allow members who cannot attend a way to join from their home locations.
2. Increase the number of sessions that focus on strategic, practical, and hands-on aspects of publishing.
3. Include a management track in the conference program, and have associated webinars. This would include topics such as change management, analytics, project management, being or getting into middle management.
4. The Program Planning Committee will add a 30-minute slot to the conference program for late-breaking topics and have a spring deadline for programs in this slot. This will allow for a few shorter presentations on hot topics that might come up between the October proposal deadline date and the time of the conference, and we can accept up to the number of programs for which we have rooms available at that time.
5. Create content outside of the conference itself, including core competencies, regional events, and continuing education topics.

The following critical success indicators will mark achievement in Strategic Direction #4:

- Usage statistics and empirical feedback of the streaming/recorded sessions will show the level of success.
- A headcount of attendees at each session would give us an idea of which types of programs are attracting the greatest attendance.

Responsible people/groups:
- Program Planning Committee
- NASIG Executive Board
- Conference Planning Committee
- Continuing Education Committee

Strategic direction #5: NASIG will work to enhance benefits to all members, with a particular emphasis on members from the commercial sector.

Intent:

Since its inception, NASIG has consisted of members drawn from the library and publisher/vendor communities. To attract and assure continued publisher/vendor involvement, NASIG will need to offer appropriate opportunities and benefits. NASIG has actively solicited commercial sponsorships for the past decade. As the publisher/vendor landscape evolves and in some cases, consolidates, the need for a review of opportunities and benefits has become more acute.

Key Actions:

1. Set up jointly-run NASIG and vendor webinars to highlight or demo a product or service that will be presented without charge to the attendees.
2. Customer reviews of products, either on the website or in the Newsletter (product spotlight)
3. Set aside time in the conference schedule for user groups/focus groups and/or juried product forums for vendors. This could also be done in an online format.
4. Market our value to the vendors and make sure they understand what NASIG is and does.
5. Proactively reach out to commercial sector when we have relevant programmatic content that matches their interests to improve the vendor-librarian dialogue.

The following critical success indicators will mark achievement in Strategic Direction #5:

- Vendor participation and sponsorships will increase as we add value and more outlets for them to the conference.
- There will be robust attendance at the webinars and conference sessions that are related to vendor activity.
- NASIG will publish 3 customer product reviews each year, and the Communications Committee will report on usage of the reviews.

Responsible people/groups:

- Program Planning Committee
- Conference Planning Committee
- Continuing Education Committee
- Communications Committee

- Fundraising Coordinator
- Marketing and Social Media Coordinator
- Vendor Input is required to make these Key Actions successful. A newly formed Vendor Input Support Task Group might be a way to get this input.

Assessment and Recordkeeping

One of the ongoing issues for the organization has been a stable form of recordkeeping. With the organization being all-volunteer, key positions like the Archivist and Treasurer turn over every two to three years. Each treasurer has had their own style of reporting data, and treasurers pass boxes of files from person to person around the country. Our historical records are kept in print format in an archive at the University of Illinois Urbana Champaign. It is not reasonable to expect our volunteers to travel across country to retrieve historical data, and even when we can collect that data, we do not have consistent data points to show the financial trends of the organization. This hinders our ability to do financial projections. Additionally, many of our treasurers do not have the background training to do such financial analysis. An overall assessment review for key information points for the NASIG Strategic Plan and NASIG Financial Plan is needed.

Key Actions:

1. Determine data points needed for financial planning and historical information needed to gage the critical success indicators from the NASIG Strategic Plan.
2. Establish a timetable and plan for collecting, evaluating and disseminating data.

The following critical success indicators will mark achievement:

- Data is available for Financial Planning Task Group and future Board members to continue their planning.
- Data is available to assist in the review of action items from NASIG Strategic Plan and assists in the revision or acceptance of actions suggested in the plan.
- NASIG develops a 5-year financial plan.
- Financial and other historical records are digitally preserved in a secure online format to avoid loss through fire or flooding and to facilitate sharing of information.

Responsible people/groups:

- Treasurer
- Archivist
- Executive Board