

The Future of CORAL

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Executive Summary/Project Goals

Many partnership and collaborative or consortial organizations are in the process of defining, refining, and redefining their vision, mission, roles, goals, strategies, and outcomes as partnership services, resources, and members struggle to identify priorities for the present and future. CORAL is no exception. Historically a successful consortium, however, CORAL is building on strengths and seeking opportunities as it plans for change. To assist CORAL members in assessing strengths, weaknesses, opportunities and challenges, consultants were brought in to assess and make recommendations on the continuation of the CORAL consortium as it is currently structured, continuance with a redefined purpose, or the possibility of dismantling the current area relationship.

Indicating a strong interest in continuing as an organization, CORAL—through a series of strategic planning initiatives—identified these goals as a potential future for the organization:

- Reengage current and former members
- Stimulate discussions of organizational activities
- Establish future goals that are meaningful and useful to all members
- Reinvigorate the organization

Consultants assessed the current goals, proposed goals for the future, and defined the area environment. The consultants are recommending that CORAL re-purpose itself in the following areas and ways over a three year period:

- Communication/Marketing
- Aggregate resources/dollars
- Decision making
- Collection support
- Development/Fundraising

These prioritized areas are organized in a logical manner rather than as CORAL's indicated priorities. For example, while CORAL members expressed interested in communication and marketing, goals related to aggregate resources and collection support ranked very high. The reality, however, is that no directions are possible without a sound communication process and a plan to market ideas, initiatives and CORAL itself. Therefore, the consultants' ordered goals in a logical fashion even when that order may not match member priorities. Additionally, several of the most important areas of interest, such as professional development and training, are integrated across existing activity areas. CORAL members will and should find redundancy, as elements of one activity may well need to be addressed in more than one area.

Who Is CORAL?

The Council of Academic and Research Libraries is an organization based in the geographic area in and around San Antonio, Texas. Nine charter member libraries founded CORAL in December 1966. In 1977 the structure was changed through incorporation as a 501(c)(3) organization. The organization grew to a high of 28 member libraries, comprised on academic, research, and large public libraries. As of 2006, there were 20 member libraries.

CORALs goals are established through the organization's bylaws to include:

- Support cooperative resource development, preservation, sharing, and outreach.
- Enhance communication and cooperation between member libraries.
- Promote professional development through workshops, seminars, and scholarships.
- Provide service and liaison to other consortia.
- Pursue grants to benefit all members of the organization.

In 2006, the member libraries received a variety of services, including:

- *Union List of Serials* (discontinued 7/06)
- Serial Holdings Maintenance OCLC
- Priority ILL
- Cooperative Borrowing
- Newspaper Microfilming Project
- Interest Groups

- Cooperative Collection Development
- Consortial Equipment

Consultant/Investigative Process

Consultant investigate processes included:

- Review of CORAL history and documents
- Research in contemporary consortia services
- Conducting planning meetings
- Designing and conducting focus groups
- Designing and delivering an online survey
- Conducting telephone interviews
- Analyzing data gathered from various sources

Specific scope of work

The consultants **will research contemporary consortium services** in order to provide the CORAL membership with a broader, range of options for creative, realistic and appropriate service choices.

The consultants **will draft a survey** to allow all CORAL members to provide their thoughts and ideas for the organization's future and to both generate ideas for and prioritize choices for service.

The consultants **will conduct in-person in-depth interviews** with at least 5 representative CORAL members, selected with input from CORAL

leadership. Interviewees will represent 2-year, 4-year, and 6-year institutions, as well as two other institutions (public library, special library).

The consultants **will meet with the CORAL membership** to review the draft survey and facilitate a brainstorming session to gather data on membership needs and preferences.

The consultants **will analyze the data** gathered from research, the in-depth interviews, surveys, and brainstorming session and prepare a report that outlines and recommends feasibility of potential services for CORAL and – when possible – processes for integrating and marketing those services.

The consultants **will review the results of the discussion and data gathering** at a second meeting with CORAL membership, answer questions, and refine data, if necessary.

The consultants **will submit a final report** to CORAL leadership.

What Do CORAL Members Want?

CORAL members, not unlike other groups surveyed, want a wide variety of resources and services. The members, however, prioritized their desires based on past experiences and individual area library needs. Not surprisingly, members value the structure offered by CORAL that overcome the isolation of the individual and provide critical networking needs. The data below includes the survey questions and specific member answers. General answers can be summarized by the following statements:

- Networking with other library experts through CORAL meetings
- Cooperative Borrowing Services
- Maintenance of OCLC holdings
- Networking with other library experts through participation in CORAL interest groups (Current and past)

What benefits have you or your organization enjoyed through CORAL?

- Networking with other library experts through CORAL meetings
- Cooperative Borrowing Services
- Maintenance of OCLC holdings
- Networking with other library experts through participation in CORAL interest groups

What areas of professional development, training, or continuing education would be of most interest to members of your organization? (Focus on the future)

- Digitization of organizational resources
- Technology/automation
- Information literacy

CORAL's support for training and continuing education should focus primarily on which ONE area. (Focus on the future)

- Bringing expensive national training to San Antonio/CORAL area at reduced rates
- Training for para-professional or support staff

Prioritize the top three benefits you would most like CORAL to consider providing. (Focus on the future)

- Collective support for major projects such as remote storage of materials, data warehousing (digital, other, etc.), digital preservation, etc.
- Hire a negotiator for better pricing of aggregate or individual databases
- Support applications to attract and/or qualify for grants
- Collective discussion and decisions for seamless delivery of library services across types of libraries

What interest groups would you like CORAL to sponsor? (Focus on the future)

- Digitization
- Resource Sharing
- Grants and Funding Sources
- Information Literacy
- Cataloging
- Reference

Benefits of Membership

- User's groups—networking, sharing information (basically same as interest groups); important for solo librarians
- Access to materials for users (easy access). Sending patrons to other locations.
- Cooperative borrowing. Important for small libraries that don't participate in Texshare.
- Courier service was important – not paid for by all Texshare members. (Courier service was also opt-in for CORAL.)
- Texshare doesn't serve all CORAL member libraries. Not eligible for membership in Texshare.
- Inputting in Union List.
- Provide funding for workshops. Bring speakers in and pay for attendance. (Copyright, for example)
- Encourages collegiality in area where it can be difficult to get together. No other forum to bring small colleges, other libraries together. (Not “series of silos”)

- Regional organization—worked hard to keep it regional and include Kerrville, Seguin, San Marcos. Good for them and good for San Antonio.
- Assist in accreditation—some libraries have used because they have access to wider/broader resources.
- Consistent relationship important for accreditation, grants (road map)
- Workshops—not just for CORAL members. Invited city leaders to some workshops (copyright)
- OCLC records download into OPAC.
- Microfilming of local/regional newspapers. UTSA project that CORAL supports. Incarnate Word. (Is this continuing? Are their copyright issues?)
- Cooperative purchasing—not in last 10 years but done on occasion.
- Scholarships to library school students (staff members in member libraries)
- Help develop policies for tenure promotion—put on discussion group and get help.
- Benchmark with others in geographic area. Local networking/collective intellect.
- Recognize contributions of people outside of libraries to libraries. Award.
- Brought good publicity – recognize local support.
- Economic value of membership
- Disaster plan—identify resources in area that can be called on. Preservation of valuable materials.

- Discussion on topics—hardware, software, migration of systems, planning renovations (what will it take to move collection?).
Benchmarking—local market information. What are other local libraries paying for service?
- Intangible benefit to librarians—opportunity for all to do service to the profession.
- Listserv. Not used extensively but can quickly poll regional libraries, advertise positions, announcements, ads for professional development.

What Do Consultants Think CORAL Members Should Do?

Recommended Future Goals for Coral (these recommendation are articulated in the three-year charts in italics)

- Maintain a network of area academic and research libraries with the enhancement of communication and cooperation among area libraries and specifically among CORAL member libraries.
- Support cooperative resource development, sharing, outreach and preservation.
- Identify professional development, training and continuing education library needs and mechanisms for delivering content to area/member library staff.
- Provide services, seek relationships and liaison to other organizations and consortia as appropriate.
- Identify grant opportunities and mechanisms for pursuing grants and alternative funding to benefit members of the organization.

Specifically, CORAL should

a. Investigate the refining and revising of the organizational structure to create mechanisms to allow

- Formal membership discussion
- Formal decision-making structure
- Interest groups (both digital and in-person)

b. Create a virtual/digital communication structure

Interest groups

c. Design marketing plan for organization

d. Create a virtual/digital content, services delivery structure

Delivery: (examples)

- E-lists
- Blog (Easy to use software such as Blogger.com with Feed reader (RSS) and a focus on easy to keep in touch/build community)
- Wiki
- Allows several users to contribute and edit content for general topics and interest group projects
- Promotes content development by everyone including non-techies
- Provides forum for sharing across all member libraries

- Keeps information up-to-date
- Easy to maintain
- RSS Feed alerts members to changes

Content: (examples)

- Professional development
 - Digitization
 - Information Literacy
 - Support staff/paraprofessional training
- Networking for existing area librarians/library staff
- Mentoring for new librarians/library staff

Services: (examples)

- OCLC
- Digitization of area resources
- Resource Sharing
- Advocacy for area issues
- Speakers Bureau – identify a knowledge base of local experts

e. Revise the virtual/digital CORAL web environment (focus on communication and information sharing and professional development accessible through the web)

f. Determine mechanism(s) to seek funding

- Internal committee
- Hired internal person

- Contract out for external development/grant individual
- g. Identify and develop funding options
- Dues structure
 - Selling a product (workshops, access, content)
 - Co-sponsorships/cooperative
 - Promotions (examples)
 - Services (external: digitization consulting; renting out shelf mover)
- h. Select one major professional development event for academic year 2008 (Sept. 2007 through August 2008) and design it as a fundraiser/profile enhancement and with a cost structure that differentiates between internal members and external attendees (IL or digitization)
- i. Select two secondary professional development focuses (one in-person; one digital)
- Element K
 - National association content (ACRL, LAMA, etc.)
 - State association content
 - Teleconferences (College of DuPage)
 - Online courses purchased and delivered through CORAL (LAMA, ACRL, library schools, ARL)
 - Online courses delivered by CORAL members (members split money with CORAL?)
 - In person workshops delivered by CORAL members (members split money with CORAL?)

- Consultation delivered by CORAL (members split money with CORAL members?)
 - Provide a forum for online communities/discussions such as Learningtimes.org, Centra, Moodle, network education exchange
- j. Consider extending geography of CORAL membership to include academic, research, and special libraries outside current membership area. Possible organizational members could include full membership, affiliate memberships (i.e., virtual members, non-voting, reduced costs, etc.), functional, or activity only memberships.

What Are Realistic Recommendations For CORAL?

While deciding how CORAL membership should proceed, a decision-making criterion should be designed for measuring recommendations. These criterion include:

- Does the activity meet new/revised goals?
- Does the activity meet new needs?
- Does the activity support basic membership?
- Is the activity commiserate to dues and fees structure?
- Does the activity raise money?
- Does the activity raise the profile?
- Does the activity attract partners?

In general, consultant recommendations for the next three years include:

- Establish a communications plan for area academic and research coral libraries and coral library initiatives
- Create a three-year professional development plan for area member libraries and coral membership.
- Design a collection development plan to identify unique/area regional needs and processes for meeting needs
- Establish a process for identifying and attracting outside funding for supporting coral initiatives
- Address area kinetic populations so area institutions could learn from each other

Year One Detail As Example

(See chart for Years Two and Three and full details on Year One)

Select in person and virtual communication mechanism for '07/08 year

- Create blog for complete membership
- Create wiki for sharing initial professional development needs assessments and discussions
- Establish virtual groups and electronic lists for discussions w/processes for virtual workgroups

Design 'staffing' patterns and process for first initiatives for coral workplan including:

- Sweat equity processes (point systems?) for work projects
- Job descriptions for member/workers

Design and deliver a fundraising professional development opportunity contiguous to fall '07 coral membership meeting considering content on:

- Digitization of unique documents
- Information literacy

Identify a subscription service to meet needs of training for coral member libraries such as Element K.

CORAL Goals

Consultant recommended goal areas for CORAL activities over a three-year period

Aggregate resources/dollars			
Increase options for purchase, subscription, rental, contractual services, special needs, consultant expertise, training/workshops, etc.			
Activity	Year 1	Year 2	Year 3
Consulting services (ex. management issues, marketing strategies, etc.)	<p>Focus group – beginning with consultant data already gathered, identifies area issues and strategies needed</p> <p>Member or ad hoc group identifies possible consultants (internal members and/or outside consultants) to meet group needs</p> <p><i>Consultants recommend that a digitization expert assist in assessing documents appropriate for conversion.</i></p>	CORAL has consultant (internal and/or external) address critical area (internal/reduced or no fee; external/fee)	CORAL has consultant (internal and/or external) address critical areas (internal/reduced or no fee; external/fee)
Professional development, training, education	<p>Ad hoc committee using data gathered identifies a minimum of two-three critical training needs to offer in Fall 2007.</p> <p>Ad hoc committee plans Fall 2007 training contiguous to</p>	Offer member/non-member training	Offer member/non-member training

	<p>existing area events for increased enrollment and possible revenue generation. (Consider TLA district meeting, joint staff development days, TSLAC system training or system membership meetings.)</p> <p>CORAL officers determine dollars available and decide if members receive free or subsidized attendance and determines fees for non-member attendance</p> <p>Ad hoc planning group assesses training event and makes recommendations for Year 2,3</p> <p><i>Consultants recommend two events are offered in fall of '07 contiguous to other events and subsidized or free to members and fees for non-members and offered in partnership with AALS and/or TLA</i></p>		
<p>Access to resources through purchase, licensing/subscription and/or subsidize purchases,</p>	<p>Survey CORAL members to determine gaps in e-resource collections.</p>	<p>Resource choices and uses are determined.</p>	<p>Resource choices and uses are determined.</p>

<p>subscriptions, etc.</p>	<p>Assign members to identify costs for potential databases.</p> <p>Ad hoc committee, in conjunction with CORAL leadership, decides on funding options and models for e-resources.</p> <p>E-resource list of enhanced, in-depth, discipline-specific sources is created.</p> <p>CORAL membership approves databases and funding model.</p> <p>Measurements are discussed, developed, and implemented for assessing the use of e-resource subscriptions.</p> <p>Investigate hiring a negotiator for aggregate or individualized databases.</p> <p><i>Consultants recommend that the first aggregate subscriptions be for statewide database 2nd and 3rd tier subscriptions to avoid having to hire a negotiator during the first year.</i></p>	<p>Measurement data assessed.</p>	<p>Measurement data assessed.</p>
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<p>Use of hardware/software (ex. content management systems, shared integrated library systems, etc.)</p>	<p>Assign a member to review current content management activities and needs.</p> <p><i>Consultants recommend that the first year be used as a study and assessment year with recommendations for years 2 and 3.</i></p>	<p>Assign a member to gather content management solutions and benchmarks, both commercial and “home grown.”</p>	
<p>Create content (ex. digital, media, print)</p>	<p>Conduct focus groups to identify appropriate content for digitization.</p> <p>Conduct focus groups to identify content that needs to be designed or created.</p> <p>Establish an ad hoc committee to identify outside funding sources, such as grants, and to determine assessment for a pilot project.</p> <p><i>Consultants recommend that the first year be used as a study and assessment year with recommendations for years 2 and 3.</i></p>	<p>CORAL members seek outside funding for pilot digitization project.</p> <p>Members assess the pilot project.</p> <p>CORAL markets the digitization project.</p>	<p>CORAL expands the pilot digitization based on a successful assessment.</p> <p>CORAL expands the digitization project.</p> <p>CORAL markets the digitization project.</p>
<p>Create pathways/access to existing content (ex. portals, lists, pathfinders/finding aids)</p>	<p>Ad hoc committee or an individual member assesses the data gathered and initiates further surveys or a focus group to determine needed pathways.</p>	<p>Pathways are created.</p> <p>Marketing of pathways.</p>	<p>Pathways are created.</p> <p>Marketing of pathways.</p>

	<p>CORAL leadership decides how they will parcel out pathway projects.</p> <p><i>Consultants recommend that the first year yields one project and that a member is awarded a sweat-equity project (ex. fewer membership dollars for one year in exchange for a series of pathfinders on Spanish language materials in the SA area)</i></p>		
<p>Support members (ex. scholarships, special projects/research, etc.)</p>	<p>CORAL membership benefits are identified by CORAL leadership, including costs of events and activities to members, scholarships available, sweat-equity work opportunities, and determine whether there are hourly moneymaking options.</p> <p>Opportunities marketing among members.</p> <p><i>Consultants recommend that benefits be “given out” and/or enacted and marketed.</i></p>	<p>Benefit processes are assessed; money is assessed as adequate or inadequate</p>	<p>Benefit processes are assessed; money is assessed as adequate or inadequate</p>

<p>Share costs on equipment, technology (ex. shelf mover, servers)</p>	<p>CORAL leadership assesses area technical needs.</p> <p>Leadership surveys membership on preferred shared purchases or rentals.</p> <p><i>Consultant recommendation is to rent/lease needed items for the present time.</i></p>	<p>CORAL leadership assesses area technical needs.</p> <p>Leadership surveys membership on preferred shared purchases or rentals.</p>	<p>CORAL leadership assesses area technical needs.</p> <p>Leadership surveys membership on preferred shared purchases or rentals.</p>
<p>Shared expertise, consulting/speaker's bureau</p> <p>---Collection assessment</p> <p>---Management consulting from area expert network (preservation)</p> <p>---Gathering and applying data from statistics</p>	<p>Ad hoc committee forms a speaker's bureau</p> <p>...determines internal member expertise</p> <p>...determines geographic area expertise</p> <p>...determines patrons</p> <p>CORAL markets internal member expertise.</p> <p>Coral uses internal member expertise.</p> <p>Coral identifies external expertise for first year project.</p> <p><i>Consultant recommends working with AALS to identify Speaker's Bureau issues and that one area be selected for bringing in expertise with or as one of the two recommended fall 2007 workshops.</i></p>	<p>CORAL continues to market internal member expertise.</p> <p>Coral continues to use internal member expertise.</p> <p>Coral identifies external expertise and established contracts for second request.</p>	<p>CORAL continues to market internal member expertise.</p> <p>Coral continues to use internal member expertise.</p> <p>Coral identifies external expertise and establishes contracts for third request.</p>

Decision Making

Collective discussion/decisions for seamless delivery of library services across types of libraries/variety of patrons

Activity	Year 1	Year 2	Year 3
<p>Increase knowledge base of library staff to improve services for customers and design is a shared service design to enhance patron services (reference 24/7, support for distributed/distance learning)</p>	<p>Ad hoc committee identifies sets of skills needed for area audiences, customers, and/or patrons.</p> <p><i>Consultants recommend basic skills be identified in one or two areas only, which might include point of use reference and technology teaching and learning.</i></p>	<p>Ad hoc committee standardizes skills and creates a training plan for CORAL members.</p>	<p>Implement first year of CORAL training plan to improve services for customers in area libraries.</p>
<p>Moving people among libraries for research, reference and information</p>	<p>Focus groups identify information seeking patterns of area patrons and designs flows of patrons seeking information and recommends services.</p> <p>Area libraries assess statistics gathered and standardizes how movement among information institutions is managed.</p> <p><i>Consultants</i></p>	<p>Statistics are assessed.</p> <p>Patrons are assessed for success in moving among institutions.</p>	<p>Statistics are assessed.</p> <p>Patrons are assessed for success in moving among institutions.</p>

	<i>recommend that pathways be determined for identified higher education scholars first.</i>		
Standardized information literacy for customers among types of libraries	<p>Focus groups identify information literacy needs and levels of patrons' needs and recommends IL standards and outcomes.</p> <p>One of the two 2007 workshops include an IL expert who will have attendees create IL plans.</p> <p><i>Consultant recommends one of the two Fall 2007 workshops be on IL.</i></p>	IL plan is implemented by area members.	IL plan is assessed.
Single access points, standardized access into digital services	<p>Ad hoc committee chooses a design for brand or logo of area e-resource gateways.</p> <p>Current e-resource access points/data is gathered for baseline data.</p> <p><i>Consultant recommends this be piloted with institutions that have evolved web environments.</i></p>	<p>E-resource brand is implemented by area members.</p> <p>Brand is marketed.</p>	<p>E-resource statistics are assessed.</p> <p>Baseline data is compared to 2nd and 3rd year data.</p>

Research projects/study	<p>Focus groups identify area research needs.</p> <p>CORAL leadership advertises research needed to area master's and doctoral students.</p> <p><i>Consultants recommend areas include a digitization project or a project that dovetails with immediate CORAL goals.</i></p>	CORAL leadership assessed progresses on research.	CORAL leadership markets research data.
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Collection support			
Activity	Year 1	Year 2	Year 3
Remote storage of materials	<p>Members assess storage needs for resources (ex. print and hardware).</p> <p>Area institutions are surveyed for space availability.</p> <p><i>Consultant recommends locations be identified but unless there is a critical need or temporary storage areas are needed, this is not a high priority issue.</i></p>	<p>Members queried for storage needs.</p> <p>Members investigate Content Management Software – commercial and “home grown” as a data storage and display and marketing tool.</p>	<p>Members queried for storage needs.</p> <p>Members pilot content management system to integrate existing data, digitized pilot collections.</p>

<p>Data warehousing and emergency management and risk management (ex. content, data storage, system backup/security management, digital, etc.)</p>	<p>Members assess data storage needs.</p> <p>Ad hoc committee assesses areas emergency management plans.</p> <p><i>Consultant recommends that area emergency data storage be identified for all members as a member benefit.</i></p>	<p>Area emergency plans are standardized to meet area needs and cooperate on emergency storage and recovery issues.</p>	<p>Area emergency plans are placed on CORAL website for sharing, with care taken to exclude proprietary issues.</p>
<p>Digital preservation</p>	<p>Ad hoc committee identifies preservation and conservator needs</p> <p>Survey membership to determine top three needs.</p> <p><i>Consultants' recommendation is to gather data and work with a consultant to assess needs.</i></p>	<p>Second year expert selected for consulting or workshops is a digital preservation specialist.</p> <p>Outside funding sought for digital preservation projects.</p>	<p>Digital project funding be continued.</p> <p>Marketing on digitized projects be targeted for area.</p>
<p>Cooperative cataloging; cooperative borrowing</p>	<p>Ad hoc committee assesses current state of cooperative collection activities, such as cataloging and borrowing.</p> <p>Membership decides on recommendations of ad hoc committee.</p> <p><i>Consultant recommends serials holdings be discussed and</i></p>	<p>Membership assesses and/or is surveyed on the benefits of cooperative cataloging and the loan/borrowing programs.</p>	<p>Membership assesses and/or is surveyed on the benefits of cooperative cataloging and the loan/borrowing programs.</p>

	<i>decided first with a cost-recovery model established.</i>		
Cooperative collection management	<p>Ad hoc committee assesses collection management area needs and issues.</p> <p>Ad hoc committee gathers member collection management documents.</p> <p><i>Consultants recommend documents be assessed for e-resource inclusion</i></p>	Collection documents placed on CORAL website.	Collection documents maintained on CORAL website.

Communication/Marketing			
Activity	Year 1	Year 2	Year 3
Design communication processes for CORAL	<p>Ad hoc committee or member identifies benchmark communication plans.</p> <p>Include focus of communication plan on networking among CORAL members and area libraries.</p> <p>Ad hoc committee or member creates CORAL marketing plan including marketing internally, area marketing to</p>	Communication plan be continued.	Communication plan be continued.

	<p>potential library program attendees, and marketing to general community.</p> <p><i>Consultants recommend the marketing plan be created simultaneously with the marketing plan or as the second major project.</i></p>		
Design marketing plan for CORAL	<p>Ad hoc committee or member identifies benchmark marketing plans.</p> <p>Ad hoc committee or member creates CORAL communication plan including outline of choices of e-lists, blogs, wikis, etc. and including face-to-face committees, workgroups, etc.</p> <p><i>Consultant recommends the communication plan to be first major project.</i></p>	Marketing Plan is completed.	Marketing plan is continued.
Provide a “front” or single, “safe” voice for addressing issues proactively including advocacy for group members; libraries and information in general and political reactive issues	<p>CORAL establishes procedures and a “call log” for acting as spokespeople for CORAL members and area libraries.</p> <p>Ad hoc committee builds advocacy into marketing plan.</p>	Focus groups discuss use of advocacy and spokesperson from CORAL.	Focus groups assess and recommend continuation and/or changing or re-purposing of spokesperson or message.

	<p><i>Consultant recommends that members be identified as spokespeople and that this process be marketed among area libraries.</i></p>		
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Development/Fundraising			
Activity	Year 1	Year 2	Year 3
<p>Unique populations; Increased base for application/to attract and/or qualify for soft dollars (IMLS, LSTA, etc.)</p>	<p>CORAL leadership identifies content for a database of library membership information and demographic data to be used for development and fundraising.</p> <p>Member or library is chosen to warehouse development and fundraising content.</p> <p>CORAL leadership assesses and chooses members fees/non-member fees; workshop fees; non-member fees.</p> <p><i>Consultants recommend fee schedules be</i></p>	<p>Members seek outside funding.</p>	<p>Members seek outside money.</p>

	<i>developed for members and non-member and that workshops be profit/revenue generating.</i>		
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Appendices

Questions Asked At Focus Groups

CORAL
November 10th, 2006

Focus Group Questions

1. What has been YOUR/YOUR GROUPS major benefit from CORAL membership?
2. Would the CORAL consortium be stronger with a different structure and/or membership? More general members? More specific/type of library membership? Any other?
3. Is there anything in your library organization that you think could benefit from a cooperative/collaborative approach? Something you can't afford or can't accomplish on your own/in your own voice?
4. Is the San Antonio/Central Texas area in need of any specific services or resources that could be better accomplished by a group? legislative? local press/marketing?
5. Did you have specific goals for CORAL when you joined?
6. Any other comments?

Aggregate Focus Group Responses

Strengths

Already existing organization

Strong commitment to patron needs

Demanding population

Patrons come from a 150 mile radius; geographic commitment

Illiteracy rate/lack of information literacy— can be addressed as a group for seamless delivery; repetition of information

Commitment of group itself to organization

Leadership commitment; CORAL is part of who we all are.

Legacy is commitment to profession. Succession planning—new management is trained about CORAL.

Professionalism

Level of expertise

Diversity of resources available in community—from post-graduate to research, etc. Historical significance, science, religious.

Willingness to share information, resources

Purchasing power.

Willingness to work together on a personal level. Can get around structures that impede in other areas.

Local chapter SLA/BLA/CLA/TLA district come together annually

Weaknesses

Low levels of literacy rates.

Everyone is not at same level of technological service (ex. Wireless?)

Institutions and patrons.

Some members are not Texshare members.

Some members not OCLC members—too small

One funding cut away from disaster.

Lack of current funding

Lack of sustained funding

Diversity can create barriers; not all working under same parameters (restrictions, liberality)—roadblocks to sharing that are outside members control.

Frequently competing with ourselves—esp. grant proposals. CORAL applying but institutions also applying.

No staff to do the work—officers have full time jobs.
High rate of change in libraries (also could be strength). Military libraries realignments.
Military libraries have left CORAL. Don't come to meetings.
No k-12 involvement.
Members not always seeing compelling reason to continue membership.
Hung up on idea of sliding scale dues. Look at basic membership fees to bring all together.

Opportunities

Growing market of people who can be hired/contracted to write grants.
Military libraries would like to be more involved.
K-12 could be market. Region 20 is strong.
Alamo Area Library System
Bexar Library Association; fill social and networking needs
Catholic Library Association
District X/ TLA
Health Oriented Libraries of San Antonio
Rich groups to market to/invite to participate in events/workshops (nine groups in area; most are multi-type)
Texshare consortial opportunities—purchases open to more than Texshare members. Negotiate aggregately; contract separately.
Programs open to anyone even if at a higher price-provide services to those who are not CORAL members. (Accept that some won't join or rejoin.)
Could look at menu driven options for membership.
Question of dues – go back to square one.

Threats

Member libraries are one budget year away from problems/cuts
Bureaucratic structure
Texshare
Other consortia (we are organization of libraries)
Lack of strategic plan
Losing collective memory/members with knowledge of CORAL are retiring.
Lack of compelling reason to continue membership.
Need to decide what we are going to do and decide if those are compelling reasons to continue membership.
Are members getting value for dues? Need assessment process.

Need enough members to remain a viable organization.

Benefits of Membership

- User's groups—networking, sharing information (basically same as interest groups); important for solo librarians
- Access to materials for users (easy access). Sending patrons to other locations.
- Cooperative borrowing. Important for small libraries that don't participate in Texshare.
- Courier service was important – not paid for by all Texshare members. (Courier service was also opt-in for CORAL.)
- Texshare doesn't serve all CORAL member libraries. Not eligible for membership in Texshare.
- Inputting in Union List.
- Provide funding for workshops. Bring speakers in and pay for attendance. (Copyright, for example)
- Encourages collegiality in area where it can be difficult to get together. No other forum to bring small colleges, other libraries together. (Not “series of silos”)
- Regional organization—worked hard to keep it regional and include Kerrville, Seguin, San Marcos. Good for them and good for San Antonio.
- Assist in accreditation—some libraries have used because they have access to wider/broader resources.
- Consistent relationship important for accreditation, grants (road map)
- Workshops—not just for CORAL members. Invited city leaders to some workshops (copyright)
- OCLC records download into OPAC.
- Microfilming of local/regional newspapers. UTSA project that CORAL supports. Incarnate Word. (Is this continuing? Are their copyright issues?)
- Cooperative purchasing—not in last 10 years but done on occasion.
- Scholarships to library school students (staff members in member libraries)
- Help develop policies for tenure promotion—put on discussion group and get help.
- Benchmark with others in geographic area. Local networking/collective intellect.

- Recognize contributions of people outside of libraries to libraries. Award.
- Brought good publicity – recognize local support.
- Economic value of membership
- Disaster plan—identify resources in area that can be called on. Preservation of valuable materials.
- Discussion on topics—hardware, software, migration of systems, planning renovations (what will it take to move collection?). Benchmarking—local market information. What are other local libraries paying for service?
- Intangible benefit to librarians—opportunity for all to do service to the profession.
- Listserv. Not used extensively but can quickly poll regional libraries, advertise positions, announcements, ads for professional development.

Telephone Interview Questions

1. What do you see a “new” CORAL achieving?
2. What do you see as a Year One goal for a new and improved CORAL?
3. What is your “great idea” for CORAL?
4. Depending on answers to questions, other questions might have included:
 - a. Should CORAL expand their membership to other types of libraries?
 - b. Should CORAL expand to similar institutions but in broader zipcode areas?
 - c. Given past accomplishments, what should CORAL continue?

Telephone Interview Data – Aggregate

What do you see a “new” CORAL achieving?

- *Re-establishing the network of area academic and research libraries*
- *Collaborative collection development/management*
- *Increasing area communication*
- *Bringing grant money to the area*
- *Expanding continuing education opportunities to the area (national level expertise)*
- *Assessing/bringing training to member library staff*

What do you see as a Year One goal for a new and improved CORAL?

- *Kick-off for new CORAL with shared/partner membership organizations (Bexar, CLA, SLA, District Meeting, etc.)*
- *Group discussions about organizational direction*
- *Re-establish knowledge base on unique collections*
- *Offer subscriptions to second-tier TexShare databases*

What is your “great idea” for CORAL?

- *Shared collection development*
- *National level professional development*
- *Expanded alternative/grant funding for area libraries*
- *Advocacy for area libraries at local, regional, state and national levels*

Depending on answers to questions, other questions might have included:

Should CORAL expand their membership to other types of libraries?

The primary mission of CORAL does not easily extend to other types of libraries like school libraries, however, CORAL would do well to plan for fundraising events - such as professional development- that attract attendees and their funds from other types of libraries.

Should CORAL expand to similar institutions but in broader zipcode areas?

CORAL needs to focus on re-attracting previous members first, such as Texas State. Then CORAL should expand membership area for academic and research libraries.

Given past accomplishments, what should CORAL continue?

CORAL should continue to focus on cooperative and collaborative collection development; providing a sounding board for local issues and provide venues for discussing contemporary library issues. CORAL needs to reestablish itself as a alternative funding, grant-seeking group who seek to provide services and resources that span member libraries and beyond.

CORAL Planning Survey Questions

What benefits has your organization enjoyed through CORAL membership?
(check all that apply)

- Networking with other library experts through CORAL meetings
- Networking with other library experts through participation in CORAL interest groups
- Aggregating dollars to buy and share larger dollar items (ex. Stack range mover)
- Professional development/training/continuing education programs offered by CORAL
- Mentoring and networking for new librarians/librarians new to the area
- Coordinated grant applications
- Maintenance of OCLC holdings
- Priority Interlibrary Loan
- Cooperative Borrowing Services
- Local Newspaper Microfilming
- Other (Please specify)

What areas of professional development, training, or continuing education that CORAL might provide would be of most of interest to you and your organization?

- Information literacy
- Technology/automation
- Library management
- Technical services
- Reference services
- Leadership
- Other (please specify)

CORAL's support for training and continuing education should focus primarily on (forced to pick one)

- Training for professional staff
- Training for para-professional or support staff
- Bringing expensive national training to San Antonio at reduced rates
- Providing a forum for members to share training they have received elsewhere

Please prioritize the three benefits you would most like CORAL to consider providing in the future:

Aggregate dollars to negotiate better options for purchases, subscriptions, rental, contractual services, etc.

Collective discussion and decisions for seamless delivery of library services across types of libraries (for example standardized information literacy, shared service design, standardized access into statewide and local digital services, etc.)

Collective support for major projects such as remote storage of materials, data warehousing (digital, other, etc.), digital preservation, etc.

Advocacy and support for political and legislative issues:

Provide a forum for collective intellect/discussion for organizational/library problem solving

Support applications to attract and/or qualify for grants from IMLS, LSTA, Texas State Library, etc)

Establish a forum for identifying trends and directions

Establish a speaker's bureau or consulting clearing house to share expertise

Hire a negotiator for better pricing of aggregate or individualized databases

Are there documents or content in your institution that might be digitized by CORAL to benefit users of other CORAL institutions?

Yes

If yes, please provide 2-3 examples.

No

7. What initiatives would you like to see CORAL develop as areas for partnership and grants?

- Shared resources (for example)
- Digitization of content (for example)
- Shared services (for example)
- Something else (Please specify)

How should CORAL's membership fees be structured?

- By size of collection budget
- By total budget
- By number of paid library staff
- By number of patrons served
- The same for all
- Other (please specify)

Regardless of how fees are structures, how much would your organization be willing to pay for CORAL membership?

- No more than \$250 a year
- \$251-\$500 a year
- \$501-\$1000 a year
- Other (specify)

Are you currently a member of a CORAL interest group?

- Yes
- If yes, which one(s)?
- No
- If no, why not?

Have you been a member of a CORAL interest group in the past?

- Yes
- If yes, which one(s)?
- No
- If no, why not?

What interest groups would you like CORAL to sponsor?

- Government Documents
- Reference and Instruction
- Interlibrary Loan
- Cataloging
- Resource Sharing
- Grants and Funding Sources
- Other (specify)_____

Are you willing to pay additional dues to participate in an interest group?

Yes

If yes, how much?

No

Are there libraries that should be invited to join CORAL?

Yes

Specify

No

How frequently do you visit the CORAL website?

At least once a week

At least once a month

Once or twice a year

Never

CORAL has a website?

What information do you think should be available on the CORAL website?

What one thing would you like to see changed about CORAL?

My one great idea for the future of CORAL is:

The last time I attended a CORAL meeting was:

November 2006

Spring 2006

Fall 2005

Spring 2005

Longer than that

Never

I didn't know CORAL ever met.

How long has your organization been a member of CORAL?

Less than 2 years

More than 2 years but less than 5 years

More than 5 years but less than 10 years

More than 10 years but less than 20

More than 20 years

What type of library is your organization?

University

College (4 year)

Junior or Community College

Special Library

Public Library

Other (Please specify)

Survey Data – Aggregate Results

A survey comprised of twenty-seven questions was administered over a three-week period in December 2006, ending just prior to the winter academic break. Forty-five responses were received. A complete printout of the survey questions and results is included in the Appendix of this document, but highlights are provided here.

What benefits have you or your organization enjoyed through CORAL membership?

Respondents could select all responses that applied. Forty-two people made 172 selections from a list of ten benefits. Additionally, respondents could select “other” and indicate something else that was a benefit. Other was indicated three times, although only one response referred to a benefit not already incorporated in one of the provided choices.

The top two responses were:

- Networking with other library experts through CORAL meetings
- Cooperative Borrowing Services

Two additional responses were also selected by at least 50% of the respondents:

- Maintenance of OCLC holdings
- Networking with other library experts through participation in CORAL interest groups

What areas of professional development, training, or continuing education that CORAL might provide would be of most of interest to or members of your organization?

Respondents could select any number of responses. Forty-four people made 163 selections from seven choices. Eight additional choices were added by respondents (collection development, financial administration, and records management were the key additional choices).

The top two responses were:

- Digitization of organizational resources
- Technology/automation

One additional response was selected by at least 50% of the respondents:

- Information literacy

CORAL's support for training and continuing education should focus primarily on which ONE area.

The purpose of this question was to identify the single-most important area for training; therefore, respondents were forced to choose only one response. Forty-four people responded.

The top two responses were:

- Bringing expensive national training to San Antonio/CORAL area at reduced rates
- Training for para-professional or support staff

These two areas accounted for more than 75% of the responses. No additional topics were added, although respondents could have chosen to select "other."

Please prioritize the top three benefits you would most like CORAL to consider providing in the future.

This question asked respondents to select a first, second, and third choice. Forty-four respondents indicated a "first choice," but only forty-two selected second and third choices.

Three options were most frequently selected as the respondents' first choice:

- Collective support for major projects such as remote storage of materials, data warehousing (digital, other, etc.), digital preservation, etc.
- Hire a negotiator for better pricing of aggregate or individual databases
- Support applications to attract and/or qualify for grants

These same options received the most votes overall, regardless of placement in the hierarchy of choices. Collective discussion and decisions for seamless delivery of library services across types of libraries was a close fourth choice.

What interest groups would you like CORAL to sponsor in the future, regardless of whether the group already exists or would need to be formed?

Digitization
Resource Sharing

Consultants Process and Timeline

Date	Activity	Who is Responsible?
September 2006	Propose and finalize dates of all project meetings and deadlines.	Consultants, CORAL Leadership
September – October 2006	<p>The consultants will research contemporary consortium services in order to provide the CORAL membership with a broader, range of options for creative, realistic and appropriate service choices.</p> <p>Invite current and former members to first facilitated planning session. Review current by-laws and other organization documents.</p>	Consultants CORAL Leadership
September-October 2006	The consultants will draft a survey to allow all CORAL members to provide their thoughts and ideas for the organization’s future and to both generate ideas for and prioritize choices for service.	Consultants
Early November 2006	The consultants will conduct in-person in-depth interviews with at least 5 –10 representative CORAL members, selected with input from CORAL leadership. Interviewees will represent 2-year, 4-year, and 6-year institutions, as well as two other	Consultants

	institutions (public library, special library). The consultants will meet with the CORAL membership to review the draft survey and facilitate a brainstorming session to gather data on membership needs and preferences.	
Two-three weeks following the facilitated meeting	CORAL membership reviews reference material and responds to survey. The consultants will review the results of the discussion and data gathering after meeting with CORAL membership, answer questions, and refine data, if necessary.	CORAL Membership
December-January 2007	The consultants will analyze the data gathered from research, the in-depth interviews, surveys, and brainstorming session and prepare a report that outlines and recommends feasibility of potential services for CORAL and – when possible – processes for integrating and marketing those services.	Consultants
February 2007	Conduct second meeting with CORAL membership to review findings and answer questions from membership.	Consultants
March 31, 2007	The consultants will submit a final report to CORAL leadership.	Consultants

Consortial Activities in Today's Market

1. Aggregate dollars to increase options for purchase, subscription, rental, contractual services, special needs, etc.
 -consulting services (manage issues, marketing strategies, etc.)
 -professional development, training, education
 -access to resources through purchase, licensing/subscription (“e,” print, etc.)
 -use of hardware/software (shared integrated library systems, etc.)
 -create content (digital/media, print)
 -create pathways/access to existing content (portals, lists, pathfinders/finding aids)
 -subsidize purchases, subscriptions, etc.
 -support members (scholarships, special projects/research, etc.)
2. Collective discussion/decisions for seamless delivery of library services across types of libraries/variety of patrons
 - Increase knowledge base of library staff to improve services for customers
 - Moving people among libraries for research, reference and information
 - Standardized information literacy for customers among types of libraries
 - Single access points, standardized access into digital services
 - Shared service design to enhance patron services (reference 24/7, support for distributed/distance learning)
3. Collective support
 -remote storage of materials
 -data warehousing (digital, , other, etc.)
 -emergency management/risk management (system backup/security, etc.)
 -digital preservation
 -cooperative cataloging
 -cooperative collection management
4. Provide a “front” or single, “safe” voice for political reactive issues
5. Provide a “front” or single, “safe” voice for addressing issues proactively
6. Advocacy for group members; libraries and information in general

7. Collective intellect/discussion for problem solving
8. Networking among staff (functions, levels, etc.)
9. Unique populations; Increased base for application/to attract and/or qualify for soft dollars (IMLS, LSTA, etc.)
10. Establish a forum for identifying trends and directions
11. Shared expertise/consulting/speaker's bureau
 -collection assessment
 -management consulting from area expert network (preservation)
 -gathering/applying data from statistics
 -research projects/study
12. Hire a negotiator for aggregate or individualized databases

Other?