

2023

2026




NC LIVE  
**Strategic  
Plan** 2023 — 2026

2023 — 2026

NC LIVE  
**Strategic  
Plan**



A photograph of a man and a woman in a library. The man, on the left, is wearing a grey blazer over a light-colored shirt and is looking down at a book. The woman, on the right, has curly hair and is wearing a light-colored top, also looking at the book. They are standing in front of bookshelves filled with books. The entire image has a blue tint.

NC LIVE allows us to offer resources to our patrons that our library system would not be able to afford. NC LIVE resources are utilized by students, teachers, parents, small business owners, local genealogists, and job seekers.

**NORTH CAROLINA  
PUBLIC LIBRARY STAFF**



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MESSAGE FROM THE

# Executive Director

**ROB ROSS**

Executive Director  
NC LIVE



I am pleased to share with you NC LIVE's new strategic plan.

NC LIVE is a membership organization that has always — and will always — be directed by the communities it serves. With that in mind, our approach to strategic planning revolved around you, our member libraries. This plan is a culmination of many meetings, discussions, data collection and analysis, member input, and internal assessment. In total, we collected input from 422 community members through a variety of methods and have consolidated our findings in this plan.

It was heartening to receive such enthusiastic and steadfast support for the work NC LIVE does on behalf of its member libraries. The NC LIVE team was energized by your kind words and are eager to improve upon our current services and explore the new services you highlighted as priorities for your communities.

Led by NC LIVE's Executive Committee and facilitated by external library consultant Cordelia Anderson, this plan validates how far NC LIVE has come over the past several years and lays out a roadmap for where we are headed. We are grateful for your investment in the past, present, and future of NC LIVE and we are committed to doing all we can to continue to support you and the communities you serve.

A handwritten signature in blue ink that reads "Rob". The letters are fluid and connected, with a cursive style.

## OUR MISSION

NC LIVE helps  
member libraries  
to better support  
education, enhance  
economic development,  
and improve the  
quality of life  
of all North Carolinians.

The resources NC LIVE provides help us enormously, and the fact that they are available for everyone in the state is fantastic.

**UNC SYSTEM  
LIBRARY STAFF**

## OUR VISION

North Carolina residents will have **equitable access** to the critical e-resources and services they need to be successful in life. North Carolina Libraries will provide **statewide access** to e-resources and services to meet the needs of residents, at a lower cost, thanks to the purchasing power, access and support offered through NC LIVE.



# GOALS & STRATEGIES

Costs for resources are going up  
and it's critical that NC LIVE be  
funded to continue to provide  
access to existing and new resources.

**NC INDEPENDENT COLLEGES &  
UNIVERSITIES LIBRARY STAFF**

# Strategic Goals

1

## ACCESS

**NC LIVE will provide residents with the e-resources they need to support education and economic development.**

### Strategies

- A** NC LIVE will invest in e-resources that meet the literacy, informational, and educational needs of North Carolinians.
- NC LIVE and the Resource Advisory Committee will review stakeholder feedback, usage data, and cost data to evaluate the current mix of resources to ensure that libraries and residents are getting the most value.
  - NC LIVE and the Resource Advisory Committee will review stakeholder feedback and other inputs to ensure that the e-resources reflect the diverse needs of residents. Inputs will include:
    - Strategic Plan survey and focus groups.
    - Resource value survey.
    - State demographic data.
- B** The NC LIVE Continuing Education & Training Advisory Committee will use the stakeholder feedback from this process to continue to evaluate and offer training and professional development that meets the needs of members.
- C** The Website Advisory Committee will
- continue to review NC LIVE's website, its functionality, its usability, and its integration with libraries' online public access platforms.
- D** NC LIVE will explore new ways to inclusively and equitably serve all NC residents by considering the addition of new services and e-resources.
- NC LIVE will develop tools and support to help libraries meet accessibility goals.
  - Working with member libraries, especially the three academic COIs, NC LIVE will study whether the timing is right to resurrect the Open Educational North Carolina program.
  - NC LIVE will study the feasibility of creating a consortial borrowing service.

**AWARENESS**

**NC LIVE and its committees will work with member libraries to explore and implement marketing and communications strategies to increase awareness, usage and impact of e-resources for NC residents.**

**Strategies**

- A** NC LIVE will improve awareness of and access to NC LIVE's e-resources. Strategies could include:
- Expanded search engine marketing.
  - Media outreach.
  - Public service announcements.
  - Other marketing strategies.
- B** NC LIVE will identify and share information about the value and impact of NC LIVE e-resources for North Carolina libraries and residents.
- NC LIVE will consider the creation of an end-user survey to evaluate and measure outcomes among NC residents.
- C** NC LIVE and the Outreach Promotions & Partnerships Advisory Committee will use stakeholder feedback to strengthen marketing and communications support for libraries. Strategies could include:
- Making content such as social media posts and print materials more customizable.
  - Improving communication between NC LIVE Committees and the membership.
- E** NC LIVE and the Outreach Promotions & Partnerships Advisory Committee will use stakeholder feedback to continue to strengthen communication between NC LIVE, its Committees and the membership.
- F** The NC LIVE Continuing Education & Training Advisory Committee will consider offering more training and professional development in the areas of marketing and communications. Topics could include:
- Social Media
  - Search Engine Optimization



**SUPPORT**

NC libraries will be empowered to advocate for increased funding for NC LIVE, starting in the next State budget cycle, leading to more investment in e-resources in future years.

**Strategies**

- A** The three publicly funded COIs will advocate for increased funding within their spheres of influence.
- Public Libraries
  - Community Colleges
  - UNC System Libraries
- B** As planned from the inception of NC LIVE, North Carolina Independent Colleges and Universities (NCICU) will also seek state financial support for their teaching, learning, and research missions; and in recognition of their own significant support of members of the public who use these libraries.



## Key Performance Indicators

In order to track progress in achieving these goals, NC LIVE will monitor and report out quarterly on the following measures.

**Access & Awareness**

- NC LIVE Collections Size
- NC LIVE Collections Usage
- Search Engine Marketing Results
- Public Awareness of NC LIVE

**Support**

- Annual Operating Budget
- Membership Participation in Advocacy Efforts
- Value & Impact Stories

# PROCESS & STAKEHOLDER FEEDBACK



We would not be able to pass

accreditation without NC LIVE services.

**NC COMMUNITY COLLEGE  
LIBRARY STAFF**





# Process

**In 2021, NC LIVE leadership saw an opportunity to refine organizational priorities and determined that a Strategic Planning process would be the best way to accomplish this. The NC LIVE Executive Committee held a listening session and discussed opportunities and challenges that could emerge during the planning process.**

## E-Resources & Services

NC LIVE is well-known throughout the state as a provider of e-resources. More recent additions have included Summon discovery service, EZproxy authentication service, a website service, professional development and training and search engine marketing using Google Grants. This strategic planning process is a chance to measure the use of and satisfaction with these services. It provides an opportunity to determine what if any services NC LIVE should add, change, or discontinue.

## Funding

NC LIVE has flat but reliable funding that has not increased since 2004.<sup>1</sup> This has put pressure on NC LIVE'S budget as costs have increased, as has the increasing demand for electronic over physical materials, forcing the organization to make critical budget-based decisions such as changing e-resources and letting grant-funded programs lapse. (See Fig. 1) This planning process provides an opportunity to evaluate the funding mix (See Fig. 2) and determine goals for future funding. With these goals in place, NC LIVE can identify the best ways to advocate for funding.

## Communications, Marketing & Brand

NC LIVE has a strong reputation within the state library community. NC LIVE employees interact regularly with its member libraries, logging more than 1,000 interactions per year. This planning process provides an opportunity to raise awareness of NC LIVE and communicate more about the critical role it plays in delivering critical e-resources to people all over the state. NC LIVE can also convey its value by sharing stories of impact and statistics. To accomplish this, NC LIVE needs to identify marketing tools and strategies.

<sup>1</sup> NC LIVE received a recurring funding increase of \$1.5M in 2004 from the State Legislature, though this amount was greatly reduced in subsequent state budget cuts.

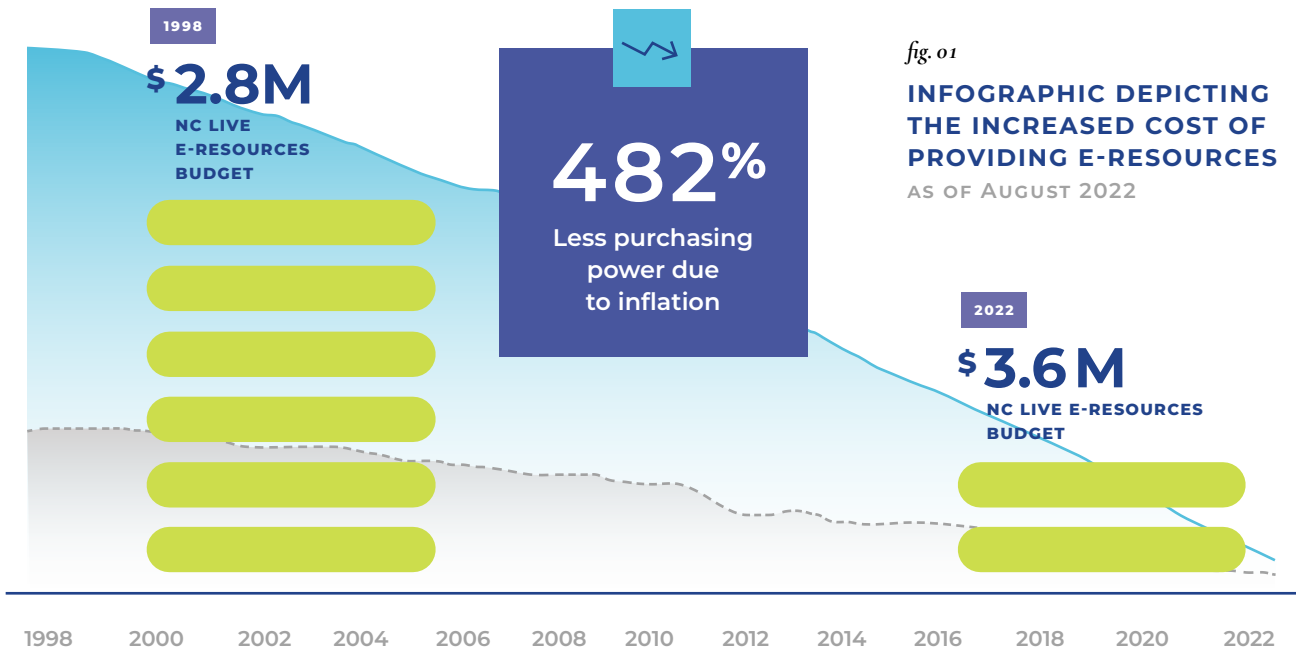
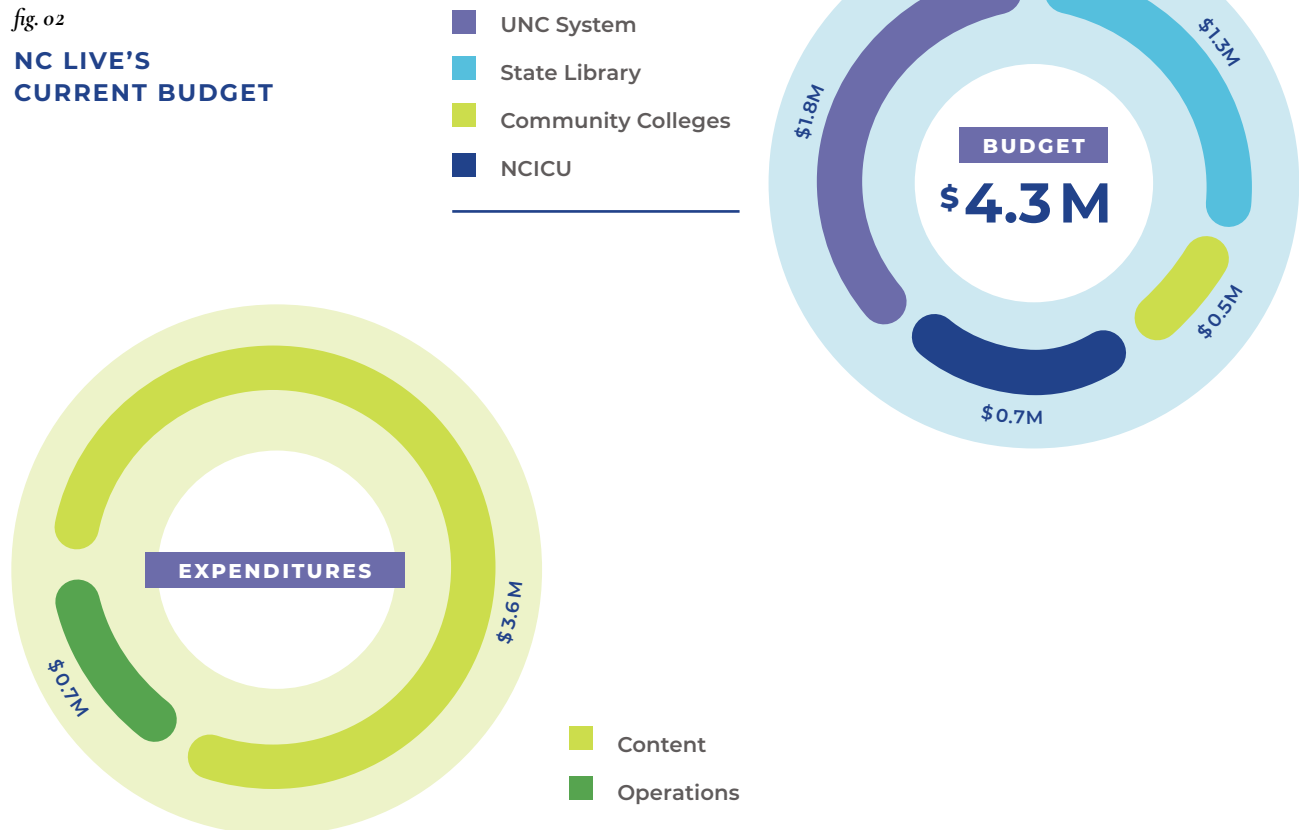


fig. 01  
INFOGRAPHIC DEPICTING THE INCREASED COST OF PROVIDING E-RESOURCES AS OF AUGUST 2022

fig. 02  
NC LIVE'S CURRENT BUDGET



The next step we took in this process was to conduct an environmental scan, looking at conditions around the state and industry best practices from other consortia and library-serving organizations. We specifically looked at other US consortia to determine potential future services. Here are some of the services that we identified.

### Potential Future Services

- Tool and/or support to help libraries meet accessibility goals.
- Open Educational Resources program.
- Statewide ILS hosting & support.
- Shared statewide catalog.
- Consortial borrowing service (ILL).
- Preservation and digitization services.
- Open access publishing and repository services.
- Library workflow consulting services.

We next gathered stakeholder feedback in the form of a survey, focus groups, and input from members at NC LIVE'S Annual Conference. Overall, there was a high level of engagement among those who participated in the survey and focus groups. (See Fig. 3) Clearly, they all use and value NC LIVE. Here are some highlights from our findings.

- Total number of engagements: 422
- Survey: 367 participants
- Focus groups: 23 participants
- Annual Conference feedback: 32 participants

fig. 03

### SURVEY PARTICIPATION BY COMMUNITY OF INTEREST (COI)

COI	SURVEY PARTICIPATION	COI PERCENTAGE WITHIN NC
Public Libraries	47.5%	40.9%
Community College Libraries	22.1%	28.4%
UNC System Libraries	12.6%	13.5%
Independent College and University Libraries	13.9%	17.3%



# Stakeholder Feedback Summary

In addition, NC LIVE staff had informal conversations with internal stakeholders to gather additional feedback. Here is an overview of what we learned.

## Current Content & Services

When asked to rate existing services, NC LIVE Collections, Training & Professional Development, and Search Engine Marketing received top ratings among all survey respondents (See Fig. 4).

Summon Discovery Service and the Website Service were ranked lowest in the survey, but in focus groups, participants saw value in them. Several libraries with constrained budgets found these services to be critical to their operations.

Among NC LIVE’s different marketing services, the monthly newsletter was the most popular in the survey and there was mixed feedback from focus groups about vendor materials. There is a desire to do more marketing, but to make it more intuitive for users — by making e-resources more visible, searchable, and accessible. Otherwise, participants said, people will “go to Google.”

Overall, Training and Professional Development were very popular, and were in the top three among existing services across all COIs. When we asked about specific offerings, feedback was still very positive (See Fig. 5).



\* We combined "Very Important" and "Important" to reach this percentage.

fig. 05

### SATISFACTION WITH TRAINING AND PROFESSIONAL DEVELOPMENT SERVICES, SORTED BY CATEGORY AND TYPE

CATEGORY	TYPE	SATISFACTION*
Training	Tutorials	100%
Training	Vendor-Led Webinars	100%
Training	Resource Workshops	100%
Training / Professional Development	Recordings	100%
Training / Professional Development	DEIA Learning Series	98%
Professional Development	Skill-Based Webinars	100%
Professional Development	Leadership Workshops	98%
Professional Development	Distinguished Speakers' Series	98%
Professional Development	Annual Conference	98%

\* We combined "Very Satisfied" and "Satisfied" to reach this percentage.

Feedback varied among COIs about what would make Training and Professional Development even stronger. For example, the public libraries focus group wanted more training on how to use NC LIVE e-resources, whereas the UNC libraries group mentioned “train the trainer” opportunities. Further input will be needed, but overall satisfaction with the services was consistently very high.

When it came to communication, NC LIVE emails were the most popular among survey respondents, but many also liked the Annual Conference. When gathering for training/professional developments or conferences, most COIs said in the focus groups that they liked having a virtual option, especially for libraries that can't spare the time or staff to travel. There was some constructive feedback in the focus groups about communication and overall transparency about decision-making and committees. Some expressed a desire for more two-way communication between member libraries and the various committees.

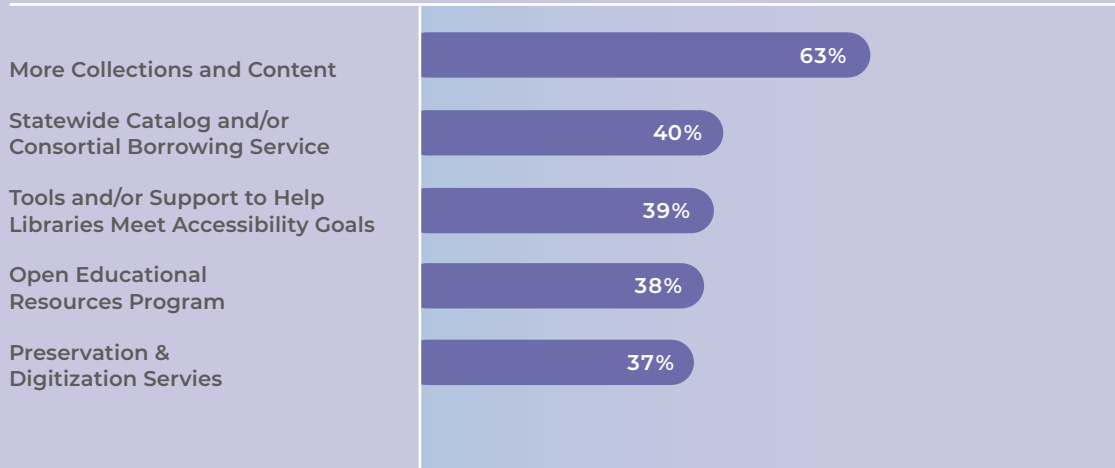
### Future E-Resources & Services

When prompted to think about future e-resources and services, survey respondents ranked collections highest. Participants were asked to select options from a list of possibilities and were allowed to select as many services as they wanted (See Fig. 6). 262 participants answered this question, and the percentages are based on that denominator.

fig. 06

### SURVEY FEEDBACK ON POTENTIAL NEW E-RESOURCES AND SERVICES

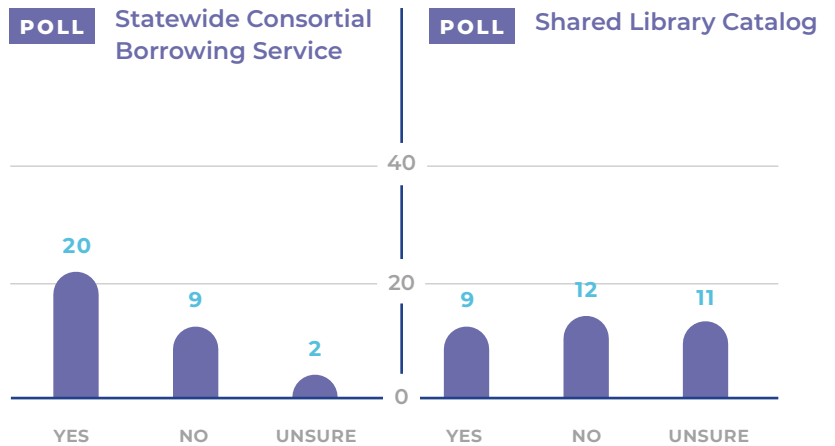
POTENTIAL CONTENT & SERVICES PERCENT REQUESTED\*



Statewide Catalog and/or Consortial Borrowing Service generated a lot of interest and discussion in both the survey and the focus groups. After reviewing focus group and survey feedback, we determined that there was some confusion about the Statewide Catalog and/or Consortial Borrowing Service option. After speaking to stakeholders, we realized that we needed to separate the two options to get more clarity. At the Annual Conference, we conducted a poll and determined that the Consortial Borrowing Service was the service that members were most interested in (See Fig. 7).

fig. 07

### RESULTS OF ANNUAL CONFERENCE POLL ON POTENTIAL NEW E-RESOURCES AND SERVICES



In the focus groups, some participants suggested that a “transformative” initiative like a Statewide Consortial Borrowing Service would get people excited enough to rally and advocate on NC LIVE’s behalf. However, most COIs were clear that they didn’t want to weaken the core of what NC LIVE offers, namely e-resources. Several said that they don’t want to lose any existing e-resources or services to add new ones. Many also felt that NC LIVE would need more staff to manage more or bigger services.

Increased funding for NC LIVE emerged as a very popular topic among all COIs in the survey, focus groups and conference (See Fig. 8).

Additionally, we asked participants at the Annual Conference how high NC LIVE funding ranked in their priorities. 42% ranked it as one of their top two priorities (See Fig. 9).

Combined with the 92% of survey participants who said it was either very important or important to increase funding for NC LIVE, this response shows strong support among libraries for increasing funding.

In the focus groups, all COIs expressed that advocacy is a challenge. For the academic libraries, most felt that the library was not high on the priority lists for their organizations’ lobbyists. For the public libraries, demonstrating impact was important for advocacy. When asked about advocacy, most COIs said they would like talking points, data, stories and tools they can use to advocate.

fig. 08

### SURVEY FEEDBACK ON THE IMPORTANCE OF INCREASING FUNDING

**SURVEY** How important is it to libraries in NC that funding for NC LIVE is increased?

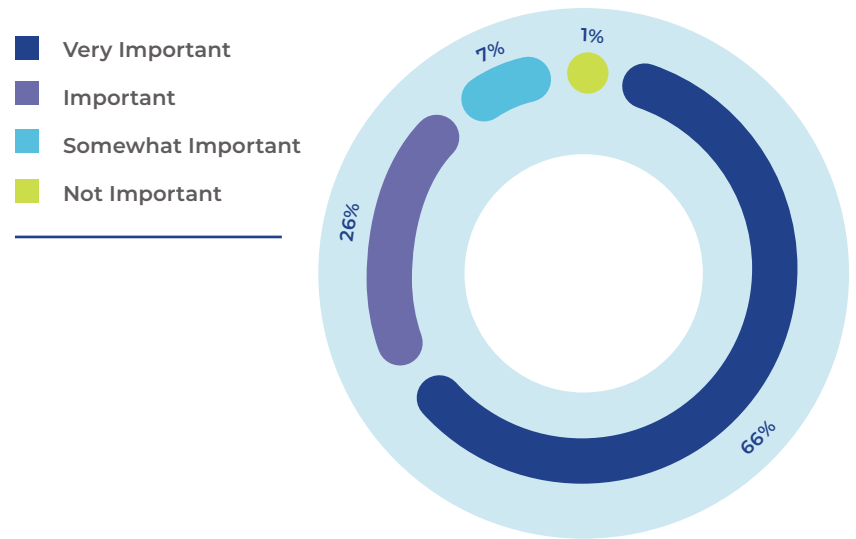
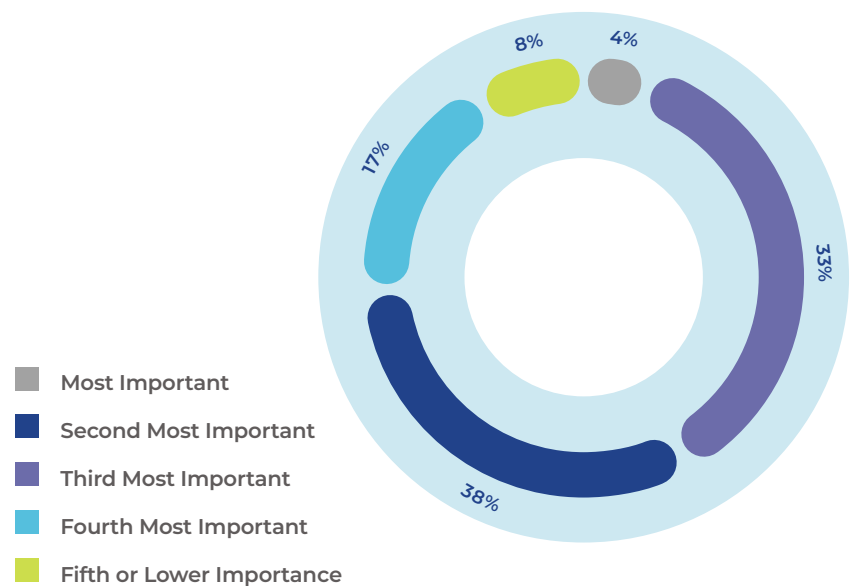


fig. 09

### RESULTS OF ANNUAL CONFERENCE POLL ON NC LIVE FUNDING

**POLL** Where does an increase to NC LIVE's funding stand in comparison to your other funding priorities?



# CONCLUSION

In conclusion, we know from the feedback received during this process that NC LIVE is delivering on its mission to provide critical e-resources that help North Carolina libraries to support education, enhance economic development, and improve the quality of life of all North Carolinians. We also know that there are many e-resource needs that have yet to be met, primarily due to the NC LIVE'S flat funding and the increased costs of e-resources. We believe that this plan will help guide us in our efforts to address these needs, which will lead to more equitable access to e-resources and positive outcomes for libraries and the people they serve.

## NOTE

While this strategic plan has a three-year horizon, it will be updated on an annual basis to adjust and adapt to changing circumstances.

# Acknowledgements

*Thanks to NC LIVE Executive Committee members:*

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