

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
Discover, develop, & implement appropriate new & emerging technology.				

TAC	MAKE THE MOST OF MILLENNIUM: More features & products to enhance & increase usability of the ILS.	2012 Shopping List (CIRCA, Reporter, Decision Center vs collectionHQ, etc.)	2013 Shopping List (APIs? Sierra?); replace aging Millennium servers.		
TAC	DISCOVERY LAYERS: VuFind, Summon, EDS.	Enhance VuFind; keep Summon (CCU); implement EDS (CMU & WSCU)	Keep making VuFind better; explore new options to integrate EDS	Replace aging VuFind servers.	...
TAC	UPGRADE TO NEXT-GEN ILS (after evaluating traditional ILS and new cloud-based products).	Update pricing & refence calls about Sierra.	Reference calls, demo updates: WMS vs Sierra vs Symphony; learn about new cloud-based services; insure new Millennium server will support new ILS.	Migration	...
TAC	STRATEGIC IT PLANNING for members.		Assist members with technology planning (MUG workshops; group-purchase training by outside agency).	...	...
Ebook	OVERDRIVE	continue purchasing titles at 2012 level	evaluate against other options		
Ebook	DOUGLAS COUNTY MODEL for ebooks	fine-tune VuFind interfaces to OverDrive, free content, and DRM content	An acquisitions model for independent publishers in VuFind is a high priority.	Continue sharing Adobe Content Server with DCL or split.	
Ebook	E-RESOURCES	Optimize user interfaces to ebrary, Springer, EBSCO, freegal, freading, 3M	a snazzy stand-alone site and app for the digital collection; evaluate new ebook sources: B&T, Axis360, etc.		

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
Ebook CONTENT CREATION		Enable loading of local content to content server		
Ebook EBOOK INFRASTRUCTURE (Adobe Content Server)		evaluate Douglas County Model against OverDrive etc.		
Ebook DOUGLAS COUNTY MODEL 3.0 ("Because the future of eBooks is unpredictable, we don't know what is coming next so we need to remain alert and agile to new developments and opportunities.")		Explore the possibility of obtaining DRM for Kindle	Enhance local model or purchase vendor-supported model	
Ebook STREAMING MEDIA		Streaming content - podcasts may be able to be integrated into VuFind soon? Also to explore Hoopla by Midwest Tape.		

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
Foster collaborative learning by sharing expertise in meetings, training, & task forces.				
Comm MUG	Theme "Making the Most of Millennium"	Theme: "E-Resources 2013"	Theme: "Making the Most of Next-gen ILS"	Theme: TBD
Comm TASK FORCES	continue	continue	continue	continue
Comm Email lists (directors; allpoints...)	"	"	"	"
Comm Ticket system	"	Schedule overviews to improve usefulness for members.	"	"
Comm Webex (remote trng)	"	Evaluate Webex vs Adobe Connect	"	"
Comm Onsite trng	"	continue	"	"
Comm Monthly checkup calls Marmot -> libraries	"	"	"	"
Comm Documentation (Best practices)	"	"	"	"
Comm New Communications Task Force	Assemble Communications Task Force	review and tune this plan; meet monthly	quarterly meetings	quarterly meetings
Comm Give members updates/guidance on R&D, Task forces, etc. Communicate who @ Marmot is in charge of projects		Create new page on active projects at marmot.org	Keep project info up to date	...
Comm More Member input to keep documentation "current"	VuFind doc updates	Specify requirements; clarify use of helpdesk wiki	...	...
Comm Search engine to facilitate information discovery, store, & push information	Test TikiWiki as a better platform than MediaWiki; implement search box at www.marmot.org	Improve helpdesk search for member library staff and marmot staff; figure out how to make effective use of blogs; CommTF review TikiWiki.	Offer members option to migrate library wikis to TikiWiki	

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
Comm continuing education to support full use of Marmot services	Assess training needs & services	Training Plan 2013	Training Plan 2014	Training Plan 2015
Comm Staff & Member development focused on emerging technologies [relevant to Marmot products & services]		Marmot purchase new technology training for member library staff	...	...
Comm Increase member awareness of ILS functions and enhancements & provide support		Millennium 2011 upgrade webinars	ILS TBD	...
Comm Standardized office practices within Marmot	Use ticket report as outline for monthly contact calls	update staff wiki with problem reporting, escalation, and resolution policies and procedures	...	...

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015	
Support members in planning and implementing IT infrastructure.					
Maint	WORKSTATIONS & SERVERS ON SITE: Backup solutions; software deployment & updates; printer driver deployment; remote support tools; on-site PM; inventory; testing protocols; warranty ... See "Workstation Maintenance Agreement"	Implement centralized printer deployment; upgrade Operations and Public Resources servers; research new backup solutions (AppAssure).	Implement new remote support (DameWare); upgrade SCCM from 2007 to 2012 for software deployment & updates; pilot-test AppAssure backup solution; document procedures to test then deploy workstation images & software updates.	Implement AppAssure backup solution for more libraries; replace Active Directory Domain Controller servers; market survey of new products for 2015.	Implement new products identified in 2014.
Maint	NEW DEVICES: Support and/or consulting for alternative platforms/devices. (i.e laptops/tablets/hand held/mobile/Mac)	Continue supporting gadget programs in libraries; provide training for library staff; point library staff in the right direction; continue to support Mac workstations.	Same as 2012.	Revisit cost/benefits of virtual desktop solutions.	
Maint	WIDE-AREA NETWORK: Appropriate bandwidth; adaptive to new technologies; scalable for growth; with traffic shaping for best user experience.	Continue adding/upgrading circuits as needed; investigate EAGLE-net and other telecom options.	RFP for telecom (E-rate 470) after 3-yr contract with Mammoth.	Implement winning response to E-rate 470 of 2013.	Continue adding/upgrading circuits as needed.
Maint	LANS & WI-FI: Meraki wireless (cloud based mgt); wireless access, printing.	Implement cross-subnet communication and wireless printing at GCLD, Pitkin, Vail. Report to members on traffic shaping test at MCPLD.	Roll out wireless printing and traffic shaping to other members as requested.	Continue growing and supporting WiFi	Evaluate WiFi upgrade options after 3 years of Meraki.

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
Maint NETWORK SECURITY: E-rate-compatible filter and firewalls blocking content, spam, spyware, viruses.	Implement new Sophos filter (Dec 2011); acquire new edge firewall.	Replace edge firewall.	Evaluate content filter options to replace Sophos.	Implement new content filter (in edge firewall of 2013 or other device).
Maint IT CONSULTING: Help members plan local IT infrastructure.	Review wi-fi options for Garfield, MCPLD, Summit.	Assist Summit to exit Marmot wi-fi services.	Continue as needed.	

Make the business case for Marmot organization & membership.

Board	PRODUCTS & SERVICES FOCUSED ON MEMBER NEEDS: ILS, VuFind, Prospector, union catalog, IT infrastructure; technical expertise & support; with options and prices accommodating different members.	Update Marmot service agreements with most members.	Renovate www.marmot.org with Marmot products & services. Create welcome letter for new directors; assign mentor director.	Update www.marmot.org	Update www.marmot.org
Board	ANALYSIS OF RESOURCE SHARING: costs & service consequences of sharing holdings.		Cost analysis with CLiC; fine-tune VuFind to minimize courier traffic; collectionHQ or Decision Center to optimize collections.	Survey other consortia; report lessons learned; and recommend Marmot changes.	
Board	BRANDING: Build a Brand, not just the logo, but the promise-the value proposition.		Organize task force of member library marketing directors.		
Board	NEW MEMBER DEVELOPMENT: determine types of libraries to target; add members for economy of scale (no cost increases for current members); be cautious with appropriate growth; watch out for "tipping points" requiring new Marmot staff or facilities.	Board approve Membership Policy & new member applications; budget for growth.	Marmot Director review sales strategy with Board every year; distribute annual reports; exhibit at state meetings; visit target libraries; budget for growth.	Same as 2013 plus Board review Membership Policy every 2 years.	Same as 2013

Review Goals & Programs Board	2012 Jul-Dec	2013	2014	2015
UPDATE MARMOT BUSINESS PLAN: new sources of revenue for Marmot that don't detract from current services.	limited VuFind consulting	Business plan cataloging service option for members; evaluate new consortium configuration models.	Business plan associate members, collaboration with CLiC.	

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015	
Continuously improve the primary service: the best possible ILS & Union Catalog.					
UCC	UNION CATALOG DEDUPING PROJECT	continue deduping at June 2012 level (30 hrs/wk), evaluate continued need for ongoing deduping in 2013, avoid creating duplicates	evaluate continued need for deduping and set an appropriate level of ongoing deduping, avoid creating duplicates	evaluate continued need for deduping and set an appropriate level of ongoing deduping, avoid creating duplicates	evaluate continued need for deduping and set an appropriate level of ongoing deduping, avoid creating duplicates
UCC	WORLD CAT or other opportunities	SkyRiver demo, quote, & evaluation	Prioritize bib record sources	...	...
UCC	AUTHORITY CONTROL	continue quarterly updates, monitor quality of updates	*Entire database refresh for Authority Control	continue quarterly updates, monitor quality of updates	continue quarterly updates, monitor quality of updates
UCC	ABSOLUTE TRANSPARENCY between catalog & OPAC indexing to inform cataloging stds	VuFind documentation for catalogers in Marmot Helpdesk wiki	Book regular communication between VuFind developer and task force	...	...
UCC	Strong adherence to CATALOGING STANDARDS AND BEST PRACTICES	Publish & follow "Marmot Cataloging Standards"	...	...	...
UCC	BEST PRACTICES for adding new members	Document procedures while adding Englewood	Review what was done for Englewood and improve the process for future members	...	...
UCC	RDA Cataloging Standards	MUG program	Update VuFind and "Marmot Cataloging Standards" to include RDA	...	...

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
UCC Improve TRAINING OF CATALOGERS in Marmot		Evaluate training needs and plan for addressing those needs, set up regional cataloging resource folks, hire external trainers		
OPAC VUFIND FUNCTIONALITY & USABILITY (catalog discovery, versatile themes for mobile, tablet, and desktop)	Survey members for development priorities and release schedule.	Enhance VuFind based on usability tests and analytics.	Continue developing & supporting.	Continue developing & supporting.
OPAC FAST PAGE LOADS	Optimize VuFind 2012	Encourage prompt problem reports for Marmot to diagnose.	...	...
OPAC PATRON ACCOUNT consolidates Millennium, OverDrive, and other systems	OverDrive + Millennium in one my account interface.	Enhance based on usability; integrate new ebook suppliers.	...	...
OPAC ENHANCED CONTENT (catalog enrichment)	Continue with Syndetics, NoveList, Google Books, Open Library, Wikipedia; but drop Amazon for cat enrich.	Make sure all NoveList Select APIs we're paying for are in use.	Reevaluate catalog enrichment options.	
OPAC CUSTOMIZATION for multi-lib types	Focus on academics summer 2012.	Continue customizing as needed; feature "best sites at MUG".	...	...
OPAC READERSFIRST INITIATIVE (seamless access to combined catalog)	Fine-tune indexing, facets, etc. for combined catalog of Millennium, OverDrive, Genealogy, and other metadata.	Adopt new APIs by OverDrive etc.	Adopt new APIs by III (Sierra) etc.	...

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
OPAC REAL-TIME CATALOG (update discovery layers VuFind, EDS, Summon, etc. to match Millennium holdings promptly)	Harvest Millennium and OverDrive metadata once or twice per day.	Evaluate Sierra, WMS, & Symphony options for export to VuFind.		
OPAC JOURNAL DISCOVERY (Summon, EBSCO Discovery Service (EDS), etc.)	Retire JDTF; minimal support for Summon; support EDS implementation for 2 members.	Continue supporting journal discovery implementations.	...	...
OPAC INCLUDE NON-CATALOG DATA in VuFind discovery layer (genealogy, institutional repository, etc.)	Fine-tune genealogy database application for MCPLD, EVLD, & Bud.	Enable other Marmot libraries to participate in genealogy; enable academics to load IR data	Continue importing new sets of metadata as appropriate.	
OPAC CONSISTENCY BETWEEN DISCOVERY LAYERS (search types, results, faceting, etc.)		[Do not degrade VuFind to achieve consistency with other systems.]	Monitor and adopt best features of Amazon as well as library systems.	...
OPAC GOLD RUSH (A-Z, Link Resolver, Reports)	minimal support (group purchase)	...	...	...
OPAC BOOPSIE (mobile app for library info, catalog, my account)	minimal support (export catalog to vendor)	Members replacing Boopsie with VuFind for catalog and my account.	Members likely to drop Boopsie in favor of VuFind and local dev.	
ASC PATRON-PLACED HOLDS: Marmot system holds & Prospector holds	ASC make sure Best Practices (BP) doc is good and clear to all, and complete with regard to Marmot system holds as well as Prospector.	ASC continue improving BP; participating in Prospector lists & mtgs; assessing courier costs & load balancing; campaign for Prospector holds to respect date priority	...	...

Review Goals & Programs	2012 Jul-Dec	2013	2014	2015
ASC PROSPECTOR		Cost/benefit analysis for Marmot members	Update Marmot Prospector cost-sharing model	Re-evaluate Prospector as regional solution
ASC CIRCA Wireless Inventory & Wireless Assistant (check out)	Recommend devices	continue training library staff on CIRCA		
ASC SEAMLESS CONNECTIVITY between ILS & academic systems	Install Patron Update API and LDAP on Millennium server for CMC	Implement Patron Update API and LDAP at CMC	Implement Patron Update API and LDAP #2	...
ASC SELF-CHECK, SIP, security, 3rd-party	continue accepting any appliance	...	...	...
ASC MILLENNIUM APP with increased functionality (e.g. CIRCA)	Develop apps based on CIRCA for CMU and SD51; convert checkouts for EPL with CIRCA.	Publish info about new CIRCA-based apps & services.		

Review & change log:

- 2-Oct First review by Ebook TF
- 1-Nov First review by UCC
- 5-Nov UCC edits collected by Amy and forwarded to Jimmy
- 13-Dec First review by TAC; changes incorporated during meeting; review by email--one more meet
- 13-Dec Ebook TF comments from 10/2-15 incorporated here
- 13-Dec UCC edits collected 11/5 incorporated here
- 17-Dec Final review by UCC
- 18-Dec Final review by ASC!
- 9-Jan First review by Communications TF
- 15-Jan Small change at 5.17
- 23-Jan Final review by Comm TF!
- 5-Feb Board did first and final review of goal #4.
- 7-Feb Goal #3 section improved by Marmot staff.
- 25-Feb OPAC TF review meeting
- 26-Feb OPAC TF changes by email
- 11-Mar Final edits to print nice copy for Council Meeting
- 23-Apr Reviewed with directors at Council Meeting
- ##### Minor edits based on Council discussions and resolutions