Planning Document for the 2010/2011 CRRA Strategic Plan

Includes recommendations from the Board of Directors, Collections Committee,
Digital Access Committee, and Scholars Advisory Committee

DRAFT 6.24.10

NB: The CRRA Strategic Plan 2009/2010 forms the basis for this planning document.

For discussion purposes, this document lists 2009/10 accomplishments in the Actions Completed column, in column two (Goals … 2010/2011)
are any incomplete goals from 2009/10 and all suggested long term goals from 2009/10.
This is *just a starting point,* something to jumpstart the conversation about CRRA priorities for the coming year. We may do some, all, or
none of the activities in column 2. We may do *new* activities next year – it all depends on what you see as important next steps.

Topic	Actions Completed in 2009/2010	Goals for Implementing the Portal, Phase 2: 2010/2011	Suggested Long Term Goals (2-5 yrs)
1. Collection themes	Affirmed 12 themes (not in priority order) 1. Catholic education 2. Catholic missions 3. Diocesan collections/Papers of - bishops 4. Men's religious orders 5. Women's religious orders 6. Vatican II 7. Catholic intellectual life 8. Catholic social action 9. Peacebuilding 10. Catholic literary figures 11. Religion and citizenship 12. Catholic liturgy and devotion Listed themes on the portal.	1.1. Focus on three themes: Catholic social action, Catholic intellectual life, Women religious. Communicate to members that highlighting these themes is not prescriptive but suggestive. Encourage members to think about their own holdings in these areas and to add to the portal what they may have in these areas, thereby supporting the portal goal to build collections. 1.2. Add links to the portal that highlight key collections, starting perhaps with the three themes to highlight in 2010/2011 (Catholic social action, Catholic intellectual life, Women religious). The links will collocate records in the portal related to each theme, thereby emphasizing portal collections and saving the time of the user.	Add themes as needed.

Topic	Actions Completed in 2009/2010	Goals for Implementing the Portal, Phase 2: 2010/2011	Suggested Long Term Goals (2-5 yrs)
2. Collection scope	Developed a collection policy. Surveyed Scholars Advisory Committee on directions for the portal. Conducted focus groups [Scholars Preview] at six institutions (Catholic, Marquette, Notre Dame, Seton Hall, U San Diego, Villanova). Summarized and posted focus group results to portal.	2.1. Continue to focus on rare and unique materials. 2.2. Encourage collaborative digitization projects.	Digitize holdings of rare and unique materials and archival collections. Evaluate and revise the collection policy.
3. Data input and ingestion	Pilot Project • Ingested 20,000+ records. • Created best practices and guidelines for ingesting records. Investigated harvesting options, drafted procedures to continually add records to the portal. Collected and disseminated information regarding workshops of interest to member s[created CRRA monthly update and Google calendar] Explored the question: what percentage of documents described in current portal records are freely available in digital form?	3.1. Revisit CRRA metadata guidelines, edit. Focus on how practical considerations have changed. Delete and add as needed. (Pat and ad hoc committee). 3.2. Index full EAD content. The ability to read and index non-Marc metadata, including EAD, exists in the latest version of VuFind. Implement the latest version of VuFind once the CSS issues are resolved. The Committee agreed that viewing finding aids in the portal is less of a priority. 3.4. Implement procedures at all member institutions to continually add records to the portal.	Determine how EAD will be standardized and delivered to users. Discover problems by trying to do it. First must see what differences in EAD among members is significant. Do other tasks first. Create templates for creating and contributing EAD and MARC records. Investigate digitization on demand. Move from portal as index to portal as repository. Hold workshops to assist contributors in adding content to the portal.

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4. Search functionality and display	Merged public face of portal and VuFind sandbox.	4.1. Make buttons on site functional. 4.2. Incorporate usability testing throughout all steps of development.	Develop a proposal for version2 of the website to serve needs of scholars, members, and prospective members. Map classification numbers or subject headings to themes. Implement the ability to display EAD records at various levels (collection, series, folder). View finding aids within the portal (rather than linking to the institution).

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5. Growth plan and outreach	Added two new members: Loyola University Chicago and St. Catherine University. Updated "About CRRA" documents on the portal. Fostered communication with CLA and ATLA. Sent update to ACCU. Submitted proposal and was awarded CLIR Grant. Outlined NEH Challenge grant proposal. Participated in ALA presentation, sponsored by CLA. Announced CLIR grant widely (CLW, ACCU Newsletter, Library Journal, to name a few) Developed dues schedule for 2009/10 based on FY 2008/09. Pursued joint funding opportunities with Catholic Peace building Network .	5.1. Articulate membership categories and associated dues. 5.2. Increase CRRA membership: set a target of 20 new members • Follow-up with AJCU members • Contact institutions already under discussion as having content, expertise and capacity 5.3. Identify next steps in reaching out to new members and contributors. 5.4. Draft a policy for committee participation, selection, etc. 5.5. Prepare a proposal for external funding for the purpose of digitizing selected high priority resources in North America. 5.6. Prepare and submit a proposal for financial support to ACCU. 5.7. Submit NEH Challenge grant proposal May 2011. 5.8. Develop a sustainable business plan. 5.9. Present session about CRRA at CLA's Digitization Workshop (to be hosted at St. Catherine's) summer 2011 (Pat). 5.10. Provide update to ACCU Library Directors and Archivists.	Develop a timeline and plan for including access to research resources in Central and South America.