

BUSINESS PLAN

2017/20

**VISION – Leading innovation and best practice
in the library community**



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EXECUTIVE SUMMARY

THE BUSINESS

The National Acquisitions Group (NAG) has been in operation since 1985. The organisation was originally established as a forum for interested parties to network and share best practice and now wishes to become a sustainable business.

- NAG is a professional organisation for people responsible for or interested in the acquisition, management and development of library resources. It is run by its members for its members.
- NAG produces impartial, good practice guidelines and quality standards relating to its core purpose.
- NAG offers opportunities for a wide range of education and training opportunities developed in response to customer demand: knowledge sharing and networking through its conferences and regional seminars.
- NAG offers appropriate advice and guidance to support individuals and facilitate personal professional development.
- NAG is a voice for everyone associated with library and information resources – librarians, information officers, publishers and service suppliers – providing leadership and a source of shared expertise for its membership.
- NAG is now aiming to become a viable and sustainable business operating for the benefits of its membership and further developing the range of services it can offer.

NAME:

National Acquisitions Group (NAG)

BUSINESS ADDRESS AND POSTCODE:

12-14 King Street

Wakefield

West Yorkshire

WF1 2SQ

BUSINESS TELEPHONE NUMBER AND EMAIL

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KEY CONTACT

Jennie Hillyard, Business Support Officer

LEGAL STATUS –

NAG is a not for profit members organisation.

NAG is a constituted group run by a voluntary management committee with four Officers - Chair, Vice-Chair, Secretary and Treasurer.

The line management of staff sits with the Secretary.

The original organisation was established in 1985 and is now seeking to formalise arrangements by operating on a commercial basis and also intends to become a registered charity.

KEY AIMS

STAFFING & SUPPORT ARRANGEMENTS



NAG KEY AIMS ARE:

- To become a viable and sustainable independent business
- To increase membership – individuals as well as organisations.
- To add value for its members by being more innovative
- Improving the NAG website – making it more attractive and valuable to the members.
- To gain the reputation for organising high quality conferences and events
- To Develop the range of services offered to members e.g. Unmentoring (an impartial, independent advice and support service for Library staff)

NAG aims to support Public Sector Organisations

STAFF - NAG OPERATES WITH TWO PART TIME STAFF SUPPORTED BY THE OFFICERS:

Business Support Officer working 10 hours per week. This post also manages the:

Finance and Administrative Assistant working 14 hours per week.

These arrangements have been in place for over 12 months and are as a result of a Needs Analysis which identified the staffing requirement for NAG moving forward.

STAFF TRAINING

Staff training will be identified as part of staff supervision and in line with the evolving needs of the organisation. Funding for training will be authorised by the Executive as required.

EXTERNAL RELATIONS

Bank -

Legal -

Accountant -

Monitoring Officers -

MEMBERSHIP OF TRADE ASSOCIATIONS OR NETWORKS

BIC

CILIP

NAG PRODUCTS AND SERVICES – WHAT WE DO

NAG'S BUSINESS MODEL IS TO SELL MEMBERSHIP OF THE ORGANISATION WHICH ENTITLES MEMBERS TO:

- Discounts at Conferences and Seminars – including accommodation and meals.
- Standards in both public and academic libraries.
- Two free (print) copy of the journal Taking Stock.
- Online access to back issues.
- UnMentoring.
- Access to new services as they are developed.
- Access to members only areas of the NAG Website.

THE ORGANISATION CURRENTLY HAS A BALANCE WHICH TRUSTEES ARE CONSIDERING USING TO:

- Improve Website 'searchability'.
- Use technology to capture information from conferences and seminars.
- Purchase and on line subscription for Taking Stock.
- Develop a new Database.
- Commission a piece of research.
- Fund development support e.g consultant time to assist in specialist pieces of work e.g. tender document, organising an information day, procuring a library management system.
- Fund non-members / offer a free conference.
- Organise free seminars for public libraries.
- Develop a Webinar.
- FAQ case study on video for the website.
- Roadshow.
- Paying a conference speaker.
- Write copy for on line training.

THE MARKET

WHO ARE OUR CUSTOMERS?

- Staff from Public and Academic and specialist Libraries.
- Library book suppliers.
- LMS suppliers.
- Publishers.
- Audio suppliers.

WHY THEY WILL BUY OUR GOODS / SERVICES?

- Cost of product / service.
- Value for money.
- Unique offer – if they are specifically interested in acquisitions then there isn't another supplier.
- Expertise.
- Buying membership then gives discounts on NAG events (e.g. Conference/Seminar).

WHO ARE OUR COMPETITORS?

- UKSG.
- CLIP.
- ARIG.
- CIE.
- Northern Collaboration.
- EPEE.
- Any other conferences as these are all competing for money and time.

CRITICAL SUCCESS FACTORS

- Advocacy.
- Consortium working.
- NAG's presence in 'e-world'.
- Governance.
- Skills, knowledge and experience – guidance.
- Fora for sharing best practice e.g. stock collections and stock development .
- Stock promotion.
- Un mentoring – talking to real people doing real jobs.
- Marketing and promotion – unique selling point – speaking up for our captive audience.
- Taking Stock – sustainability on the website.

MARKET RESEARCH

COMMENTS FROM RESIGNING MEMBERS



“An excellent opportunity to meet new people, and put my own work into perspective. Really good to see the mixture of academic and public libraries and understand more about the business of running a library”

(CONFERENCE FEEDBACK)



“Great Opportunity to network with fellow acquisitions librarians/managers”

(CONFERENCE FEEDBACK)



“Always really well organised and relevant to new developments”

(SEMINAR FEEDBACK)



“It is always a really useful opportunity to catch up with peers and also to meet new ones, which can be even more difficult in day-to-day life”

(SEMINAR FEEDBACK)

“I do appreciate how valuable NAG has been to us in the past it's just for the last few years we don't seem to have used the website or events. Like everywhere else our budgets are under pressure so we have to justify everything we spend and at the moment I'm not sure I could.” (Sheffield Public Libraries)

“Due to financial pressures all our current subscriptions are under review. Unfortunately in the case of the NAG subscription, we cannot make full use of the subscription benefits and as such the decision has been made to cancel the subscription after this year.” (Hartlepool Public Libraries)

“We have been going through a period of change here and re-focused the company to concentrate almost totally on our foreign language business. This has been a very expensive process and the focus of the company has been to consolidate in our new environment and make ourselves stronger moving forward in the face of Local Authority spending cuts. To achieve this we have cut back on all of our spending and at this time we would like to cancel our membership of NAG.

We are aware of the important role the organisation plays in our industry but at this time we are cutting back very hard to ensure our company continues to grow and develop in its new format and new home. We hope very much that this will be us opting out for a year rather than us leaving forever.” (BrightBooks)

The rationale behind the business, taking these comments into account is that we will try and overcome the difficulties these organisations face by offer will offering a membership structure and pricing strategy which will make it more cost effective for them to allow staff to attend events and conferences.

SEMINAR 2017 FEEDBACK



WHAT DID YOU LIKE MOST ABOUT THE SEMINAR?

- “The presentation about the PDA & Chrome Plugin”
- “Variety of presentations and focus on service improvement”
- “The excellent organisation and the relevance of the presentations”
- “Really useful to hear about different ways other institutions have improved performance and to come away with some ideas for improvement at my own institution”
- “Networking opportunities and relevance of talks to my role”
- “On demand video streaming presentation was very interesting and informative”
- “Very useful sessions particularly the lego game!”
- “Varied but inter linked topics”
- “Presentations. Will we be able to get slides online later?”
- “Working with colleagues from other institutions, hearing about really similar projects, which were relevant, applicable & informative.”
- “Finding out about what others are doing”
- “It was very well organised and well timed.”
- “Full schedule. No wasted time”
- “The lego / lean exercise at the end was fantastic. Very involving and illuminating. An easy way to demonstrate how processes (esp. in libraries!) are wasteful. “
- “Variety of papers”
- “Meeting with, and hearing the opinions and experiences of peers in other institutions
- “Interactive session”
- “Every session had a relevance to the things we’re working on/developing at the moment and we came away with lots of ideas”

- “Range of the talks - all relevant. Interactive session - this could have been earlier in the programme to get us all talking!”
- “The opportunity to learn about innovations undertaken in acquisitions teams and the focus on ACQUISITIONS (not public facing activities!).”
- “The presentations were well selected and interesting. The end session was enjoyable.”
- “2 things: having the opportunity to chat with other colleagues and share experiences. Also, Ted and Matt’s talk!”
- “Really good mix of different projects and approaches. Loved the OEE Lego exercise. Hearing about how other HEI’s are doing EBA in a positive way.”
- “Variety and useful following Glisser presentations”
- “The presentations were highly relevant and high quality. The lego task was fun and illustrated its point well. I also liked the fact that questions could be asked via Glisser - hadn’t seen that before.”
- “They were well chosen and covered a good range of issues”
- “I have been to the Collection Development seminars a couple of times and I always find them extremely helpful and relevant to my work. This year in particular I found the session about Askews and Holts PDA+ very useful as this is something my library is considering.”
- “Friendly. Varied. Some useful presentations that I’d like to investigate further.”
- “A good range of current subjects affecting acquisitions, as well as offering new approaches to old problems”
- “Hearing what other institutions are doing”
- “Streaming PDA talk”
- “All the slides are available online so I can see them on my mobile device.”

SEMINAR 2017 FEEDBACK

WHAT DID YOU LIKE LEAST ABOUT THE SEMINAR?

“The streamlining workflows wasn’t what was expected and very specific rather than general process advice.”

“The breakout activity was not obviously linked to acquisitions.”

“I was sorry to have had to leave early for return travel

“I think it’s really difficult to make presentations about spreadsheets interesting - I know, I’ve had to do it myself! It was very clever, though.”

“Labels could have been bigger - hard to read delegate names”

“No”

“Nothing - maybe quite a journey to get here.”

“The talk from Bradford about using data from Sierra was very poor & disappointing. I didn’t think it was applicable to very many people in the room, and it wasn’t what I was expecting from the talk. I was hoping for something at the management level.”

“Not enough lunch - ran out and queue behind me still!”

“Nothing. I enjoyed all of it!”

“One talk a little on the technical/detailed side but I’m sure it was useful to some people! Nothing at all”

“There were a few technical issues Difficult to see screens from where I was sitting.”

“lego exercise!”

“I enjoyed all the talks, though a couple were very detailed, focussing on exactly how things are done rather than an overview of the impact and wider ideas. Would perhaps be more useful to follow up with detail afterwards, where relevant”

“nothing”

“Not quite enough seats for all delegates, would have been nice if a table near the door had been left free for those who arrived slightly later than planned due to rail issues.”

“Not anything I can think of.”

“Practical activity with lego felt rushed and could have had more time for reflecting back on how it related to the consultancy work done in libraries previously. Also felt a little like an advert for their services”

“The microphone wasn’t always used for audience questions, so I couldn’t always hear the questions.”

“I don’t think there was anything I didn’t like”

“Occasionally the presentations could become a little technical. A 30 presentation should probably be focussed on “broad strokes”, with any technical support information offered afterwards.”

“Streamlining Acquisitions workflow was about Metadata and not relevant for us”

SEMINAR 2017 FEEDBACK

DO YOU HAVE ANY FURTHER COMMENTS ON THE SEMINAR?

“More of the same please!”

“Thank you for organising”

“Well timed; exactly a topic for things happening in my workplace and others”

“It was my second NAG seminar, & I’m sure I’ll be there for the next one too!”

“It was very thought provoking - no negative comments well done”

“All the topics were very interesting especially the “Chrome Plugin” talk.”

“thank you!”

“First rate, well run, very informative and enjoyable.”

“It would be good to be offered a structured opportunity to “network” with other attendees. This could be just a brief structured discussion after a presentation to share experiences or thoughts. Thanks for arranging, a useful day as ever!”

“Paper 5 - did not live up to the title give, and as it came just after lunch it was completely lost on me.”

DO YOU HAVE ANY SUGGESTIONS FOR FUTURE SEMINAR TOPICS?

“Improving e-resource engagement”

“Interested in “more with less” themes! Trying not to merely survive, but to enhance service provision in a climate of staff reductions and limited budgets.

The value of self-reflection, engagement and a culture of improvement - actually, I might try and write something the moment I get a breather... “

“More of the same and different issues”

“Reader Request/Suggestion workflows and integration with webforms and LMS;

Evaluation of supplier performance/best value and building evidence to support this;

Dealing with Donations/gifts;

“I’ll let you know....”

“Restructuring and reorganisation - lean processes in acquisitions teams. “

“Reading Lists - a blessing or a curse / the new normal”

“Integrating scanned readings and book acquisitions - making savings”

BUSINESS ENVIRONMENT



SWOT ANALYSIS

STRENGTHS

- Links to publisher/supplier side of industry
- Ability to respond to expressed need
- Retention of members- within current climate
- Well qualified and elected committee members
- Strong support mechanisms for library in the field
- Proved quality assurance systems for seminar/conference delivery
- Low cost of training for the member/non-member –value for money
- NAG quality standards
- Accreditation for collection development
- Promote knowledge and understanding of technological developments in publishing, bookselling and library and information work, and their use in acquisitions.
- To provide a forum for acquisitions professionals to discuss issues

WEAKNESSES

- Slow response/delivery times due to committee structure
- Poor database for sending marketing info
- Links to business plan for the organisation
- Confused Brand Messages and understanding of NAG function- who should be a member and What's in it for me?
- NAG title
- Lack of wider consultation
- Position in the market place
- Low cost of training for the non- member
- Advocacy for the role of libraries

OPPORTUNITIES

- New volunteer run libraries needing advice and training
- Managers who have newly taken on acquisitions responsibilities
- Technology > webinar based training
- Training needed by librarians on new technology
- Advocacy side
- Taking Stock e version
- Library Service Advocates
- Reduction in CILIP training courses
- New working practices in sector both local authorities and academic institutions
- Target audience
- Formal accreditation for all courses- aligned to an awarding body
- Un Mentoring scheme
- Awareness of producers and suppliers of the state of the art of acquisitions in libraries and information units, and vice versa.

THREATS

- Staff redundancies in Public library sector
- Loss of existing staff
- Competition from other providers in sector
- Funding changes in public sector
- Funding policy NAG
- Lack of clarity of NAG role
- Teleconference not attending seminars- income stream and relevance of organisation

BUSINESS ENVIRONMENT - KEY ISSUES FACING NAG FROM THE EXTERNAL ENVIRONMENT

PEST ANALYSIS

POLITICAL

Brexit
 Government cuts
 Lack of definition of what are Statutory Services
 Local authority powers
 Higher Education – infrastructure of university – how the leadership and directorates value library services

ECONOMIC

Economic funding for HE and FE due to Brexit
 International students
 Value for money – outsourcing, loss of control and expertise
 Consortia – big business affects suppliers
 Competition for smaller pool of students – big institutions increasing intakes plus smaller institutions struggling to attract students
 Declining number of suppliers
 Declining budgets
 TEF

SOCIAL

No single model for public libraries – volunteer led, community led, community hubs, mutual
 Loss of experienced librarians – redundant, retiring etc
 Less qualified librarians
 Loss of professionalism
 Diversity of libraries
 Customer focus – ‘student as a customer’
 Public libraries – borrowers v learning & knowledge
 No one captive audience
 Outsourcing

TECHNICAL

Rapid changes and inability to keep up
 Lack of infrastructure
 Different systems
 Limitations / promotion in innovation and application
 Transfer to digital resources
 Maintaining NAG’s digital presence
 Aging professionals – ‘brain drain’ of library professionals

KEY ISSUES FROM SWOT AND PEST

From a social perspective the need for library services is changing, the way we live and work means we need to deliver services in new innovative ways to meet changing and escalating expectations NAG has a role to play

Effects of external funding from national and local government including the uncertainty regarding Brexit and funding for students

PREMISES / LEGAL / INSURANCE DETAILS

Property Details

- Rent / Lease per year - £5400
- Valuation of Property - N/A
- How often is this paid - monthly
- Offer / conditions - Rent / Lease term 3 years
- Is this renewable? - Yes on a three yearly basis
- Date of expiry of current lease -

Additional info:

- The Landlord is responsible for repairs inside and outside the building
- The building is a multi-occupancy building with other occupants renting space.
- Rates per year? £0.00

Legal requirements:

Public Indemnity – **Paid annually**

Auto-enrolment of pensions for any staff that qualify

Lone working policy

Electrical PAT testing **Valid to Oct 2017**

Insurance requirements:

Public Indemnity : **Paid annually**

Building / contents insurance:
Building N/A. Contents insurance paid annually.

SUPPLIERS AND CONTRACTORS /FINANCE

Major Suppliers:

Website developers (Rusty Monkey)

Printing / graphic design

All My Systems

Alternatives

Business policy would dictate 3 quotes for all purchases

Extensive research when tendering for work

Advantages of buying from the suppliers shown above?

Price and convenience.

Website: Record of competent and efficient work – a trusted supplier.

Financial viability

Profit & Loss

2013: Loss: (£56)

2014: Profit £1,429

2015: Profit £3,340

2016: accounts being compiled currently

Budget Assumptions

Cash Flow Forecast – see Appendix 5



National Acquisitions Group