**TO:** PLA Board of Directors

**RE:** Strategic Plan 2018-2022 Update

**FROM:** Mary Hirsh and Scott Allen, Deputy Directors

**DATE:** January 4, 2019

**ACTION REQUESTED/INFORMATION/REPORT:**

Report

The 2018-2022 PLA Strategic Plan was finalized and approved by the board at its June 2018 meeting. The following provides an update on PLA’s efforts to promote and implement the plan.

Communications/Promotion

As reported to the board in November 2018, PLA has promoted the new plan to the membership and others by posting it on the PLA web site, distributing a press release to library trade media, sending an email blast to PLA members, and including articles in the September PLA e-news and the September-October issue of Public Libraries. PLA also created a set of messaging points and FAQs about the plan, which were shared with staff at a staff “training event” in September, and included in the November 2018 board materials.

Implementation and Tracking

A subset of staff have met repeatedly to begin mapping PLA activity and proposed activity to the goals and objectives, emphasizing one priority per objective. By having a manageable number of priority activities, we will be better able to flesh out action steps and measures, and report on successes.

A draft of the 2019 priority activities is attached to this board report. Priorities were typically determined based on what was already in process and/or seemed achievable in 2019. The board’s input about which activities have been identified as priority, and what if any “other activity” that may be listed or missing entirely should be elevated or receive more focus, is encouraged.

Also attached to this report is a simple table that takes many of PLA’s core programs and current initiatives and organizes them according to which strategic plan goal they relate to most closely. Most address multiple goal areas, however for tracking and reporting, aligning each to one goal was necessary.

Gaps

As requested at the November 2018 board meeting, staff will determine a process to track and report on aspects of the strategic plan that are not being addressed by PLA. An initial review suggests PLA will address every goal area in some capacity, so it may be more fruitful to determine a way to weight PLA’s work and determine which goals and objectives may deserve more attention. Staff will report on this for the spring 2019 board meeting.

**PLA STRATEGIC GOAL LINK (check all that apply)**

TRANSFORMATION  LEADERSHIP  ADV. & AWARENESS  E.D.I.S.J.  ORG. EXCELLENCE

The following includes all the goals and objectives of the 2018-2022 PLA Strategic Plan along with the suggested 2019 priority activities. Identifying a priority activity does not mean PLA will not address the objectives in other ways. However, confirming priority activities for each objective will enable us to easily and consistently answer the question “what is PLA doing to address that objective?” and also provide some direction in producing annual reports on strategic plan progress. It will also help prioritize staff time needed to flesh out action steps and identify measure of success. Priorities are listed in RED. Completed other activities in indicated in PURPLE.

**Goal: Transformation**

**Goal Statement:** PLA advances public libraries’ transformation from a library focus to a community focus, to meet the specific needs of people and communities.

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| **Objective** | **2019 Priority** | **Other 2019 Activity** |
| **(1):** Define and support the transition of public libraries to become more responsive to – and reflective of – community needs. | *Create and promote definition of libraries as responsive to and reflective of community needs.* A subgroup of staff along with the PLA board will use core PLA language (positioning statement, strategic plan preface) to develop this definition and determine how to include it in key PLA messaging, training programs, and more. | Expand “professional tools” section of PLA web site to incorporate additional resources related to community needs; incorporate into CE/PD programming |
| **(2):** Increase opportunities to explore and share effective emerging best practices that are addressing community priorities. | *Promote and grow ALA Connect member interest groups*. All staff and committee leaders are working to make the interest groups active, which will be assessed via growth in membership, number of posts/discussions, and other metrics. | Begin to assess individual initiatives’ strategies to encourage sharing; consider how sharing of best practices can be integrated into PLA 2020; promote and contribute to expansion of ALA Public Programs “Programming Librarian” database; build on Libraries Transform campaign and “Because” statement toolkits to share best practices |
| **(3):** Increase awareness of and access to the types of literacy necessary for skills development and success in the 21st century. | *Increase digital skills at the community level through public library facilities, programming, and staff development*. The new Microsoft and Google projects, along with the ongoing work of the PLA Digital Literacy Committee, will create new tools for PLA to help public libraries with digital literacy. | Other PLA initiatives will continue to promote early childhood literacy (ECRR), health literacy (joint work with NNLM), and data literacy (Project Outcome, MEAC work). PLA will also promote financial literacy through a new sponsorship agreement with Capital One. |
| **(4):** Increase the number of libraries using meaningful and actionable measurements to understand and expand their community impact. | *Expand use and impact of Project Outcome (number of active users, surveys created by libraries, survey responses, and survey tools)*. Ongoing Project Outcome support, plus development of questions for a new health literacy/health programming service area through an agreement with the National Network of Libraries of Medicine (NNLM). | Continued planning for how to share the Project Outcome model internationally. Added Google translate to Project Outcome website. Created offline data collection templates for libraries outside US. |

**Goal: Leadership**

**Goal Statement:** PLA builds and supports leadership for public libraries that is reflective of the needs of each community and the profession.

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| **Objective** | **2019 Priority** | **Other 2019 Activity** |
| **(1):** Increase leadership and personal development training opportunities for all levels of public library staff reflective of the PLA leadership model. | *Offer regular Leadership Academies using the revised leadership model, beginning with a 2019 training event*. The next PLA Leadership Academy will be March 25-29, 2019 in Chicago. | Work on developing new content including training specifically for early career leaders and for nonlibrarians joining the public library field (previously referred to as “Public Libraries 101”), continue to work with the ALA Emerging Leaders program and consider it as a model for a future PLA initiative |
| **(2):** Support public library staff in the shift from a library-centered to a community-centered approach, through PLA trainings and resources. | *Plan and develop new strategic planning content.* PLA staff held a series of phone meetings with an ad-hoc member group to assess strategic planning needs, ideal formats, and strengths and gaps of existing resources to leverage. | Consider how elements of the Leadership Academy content which highlight the community-centered approach could be repurposed as webinars or online courses; explore opportunities and funding to develop an asset-based community development tool for public libraries; complete and publish CE/PD “theory of change” white paper as part of the shift to a community-centered approach |
| **(3):** Encourage learning opportunities for all library staff through collaboration with library schools and support access to other types of learning available to library staff including CE, online courses, certificate programs and conferences. | *Use spring 2019 member survey to learn more about the specific needs and backgrounds (ie library versus nonlibrary) of PLA members and others,* to ultimately contribute to planned CE/PD around core library issues, public library issues missing from MLIS programs, etc. | Work on developing new content including training specifically for nonlibrarians joining the public library field (previously referred to as “Public Libraries 101”) |

**Goal: Advocacy & Awareness**

**Goal Statement:** PLA leads in public library advocacy and influencing perceptions of public libraries.

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| **Objective** | **2019 Priority** | **Other 2019 Activity** |
| **(1):** Increase awareness and strengthen perceptions of public libraries among key audiences and stakeholders. | *Begin strategic review of potential key audiences, collaborators, and partners.* Both the PLA Advocacy and Strategic Partnerships Committee (ASPC) as well as the new customer relations management (CRM) system being piloted by the ALA Washington and Development Offices can provide input into different audiences and potential partners to engage. | Support the PLA ASPC to connect with the priority groups determined in 2018 (NACo, NLC, CC, ICMA); revisit From Awareness to Funding report to determine how to promote and use that information |
| **(2):** Increase awareness and the effectiveness of PLA/ALA’s advocacy resources and create new tools to support current and future advocacy efforts. | *To be determined* | Begin process to revise and relaunch Turning The Page; explore partnering with ALA’s Advocacy Bootcamp; determine how PLA can track library referenda and results to ultimately move the field; explore opportunities to better collaborate with the ALA Libraries Transform campaign |
| **(3):** Increase library staff participation in public library advocacy at all levels (i.e., federal, state, local). | *Support (financially and with input) and report out on the ALA Policy Corps program.* | Collaborate with the ALA Washington Office to determine how PLA can better support their priorities |
| **(4):** Improve PLA’s capacity to serve as a resource to public libraries outside of the U.S. that are conducting library advocacy. | *Work with ALA IRO, ACRL, and AASL to promote the IFLA Global Visioning report further, and also highlight examples of how libraries globally are achieving results with very limited resources.* | Consider developing international exchange programs; identify and promote libraries with “sister city” programs |

**Goal: Equity, Diversity, Inclusion and Social Justice**

**Goal Statement:** PLA advocates for equity, diversity, inclusion and social justice in order to enable every member, library, and community group to fully and equally participate in a society mutually shaped to meet their needs.

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| **Objective** | **2019 Priority** | **Other 2019 Activity** |
| **(1):** Reflect EDISJ principles in association leadership, staffing, values, mission/vision, strategies and operations. | *Develop a process to benchmark and assess PLA’s association leadership, staffing, values, mission/vision, strategies and operations for EDISJ principles.* | Use results of assessment to make plans for 2020 and beyond. |
| **(2):** Equip members with tools, mentoring/coaching, learning opportunities, and other resources to advocate and apply EDISJ principles in their libraries and communities. | *Develop and present 3 regional trainings on EDISJ for up to 300 total public library staff.* Evaluate the process and content and make plans for continued trainings and education in other formats for 2020 and beyond. | Present 2 preconferences at the 2019 ALA Midwinter Meeting on EDISJ; begin planning content for an inservice toolkit or “training in a box” on EDISJ; consult the Task Force on EDI to identify topics and authors for PLA articles and publications on EDISJ |
| **(3):** Identify measurable impacts, including professional competencies, that demonstrate progress in key EDISJ areas. | *to be determined.* | to be determined. |

**Goal: Organizational Excellence**

**Goal Statement:** PLA is entrepreneurial, resilient, and successful in the sustaining and growing of resources to advance its mission and work.

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| **Objective** | **2019 Priority** | **Other 2019 Activity** |
| **(1):** Maintain a financially stable and sustainable operating model. | *Implement two-year “package” sponsorships for PLA and PLA Conference activity to increase vendor support of PLA.* PLA staff have met with Corcoran Expositions, who sell PLA conference exhibits and sponsorship, and drafted new approaches to soliciting sponsors. | Continue with full-membership launch of the Fund for the Future and grow number of donors and funds contributed; use 75th anniversary to launch 1-2 special giving opportunities; continue to review major gift prospects and engage board members and other leaders in contacting prospects; do corporate and foundation giving research and create prospect list by PLA program/issue areas; create resource seeking/sharing partnership with outside groups (NNLM, National Center for Families Learning) |
| **(2):** Commit to and support ongoing, regular data-driven assessment of PLA impact on the library field. | *to be determined.* | to be determined. |
| **(3):** Increase the number of income-generating products and programs. | *Hire consultant to help evaluate potential for CE/PD products based on PLA major issue areas and create plan for product development.* In January 2019, PLA staff are meeting with a consultant to help develop plans for inservice toolkits or “trainings in a box” on topics such as digital literacy, EDISJ, family engagement, leadership and more. | hire new Project Manager (new, 1.0 FTE, grant funded) to work on product development; continue collaboration discussion with NCFL to develop new or repurpose existing family engagement products; consult the Task Force on EDI to identify topics and authors for PLA articles and publications on EDISJ; conduct regional EDISJ trainings; map CE/PD “Theory of Change” document to existing PLA programs and promote as part of overall strategy to increase purchases/registrations for PLA programs; revisit membership model to determine strategies to increase membership numbers and dues income |
| **(4):** Oversee successful stewardship of the multi-year Legacy and future grants. | *Create and fill Fiscal Officer position on the PLA board.* | Accept additional $100,000 in legacy funding from TASCHA and work with them to plan legacy partner convenings and coordination in 2019 and beyond; begin review of PLA policies and procedures to determine which are outdated or missing and set plan to update them; continue to support efforts of the ALA Office of Development to pursue and oversee private grants by working with the new Assistant Director, Corporate and Foundation Relations |
| **(5):** Seek and adapt to new trends and models in association organization and membership. | *Remodel schedule and activities for PLA 2020 to better reflect emergent trends and new conference models,* learned from association literature, participation in PCMA meeting, etc. | Promote staff participation in external professional development events, such as ASAE, and support attendees to share learnings with other PLA staff; position CE/PD “theory of change” work and related white paper as pathway for member engagement and cutting-edge association work; support and advance member interest groups via ALA Connect by learning from other associations |
| **(6):** Maintain strong relationships with existing partners, both nationally and internationally, and explore new partnership opportunities outside of the library field. | *Support the PLA Advocacy and Strategic Partnerships Committee to connect with priority groups NACo, NLC, CC, ICMA*. Staff has already participated in the national meetings of a few of these groups, and NACo and NLC have been engaged as members of the opioid project steering committee. | revisit the 2017-2018 legacy-funded work on the Partnership Map to determine potential to continue some or all of that work; consider how to make information on PLA partners “outward facing” to benefit library leaders in better understanding different groups and their relationships to public libraries |
| **(7):** Invest in more professional development training for PLA staff to strengthen their capacity to meet member and library field needs. | *Continue to participate in the GMMB-led “communications workgroup” of legacy partners (PLA, IFLA, TASCHA) and incorporate learnings into PLA communications work* | draft policy and practice related to PLA staff participation in job-related CE/PD (for instance, require one major PD activity annually); continue to participate in ALA 411 sessions to learn from other ALA units; research options to do assessment of staff skill gaps (product development, fundraising) |

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| **Transformation** | **Leadership** | **Advocacy & Awareness** | **EDISJ** | **Organizational Excellence** |
| Programs that help *public libraries* be community focused, address emerging community needs, implement best practices, and address literacy | Programs that help *public librarians and library staff* become stronger leaders, and become community-centered | Programs that reach key audiences about the value of public libraries; that engage members in advocacy; or that work internationally | Programs that help PLA or members implement EDISJ principles or that help libraries create full and equal participation in their communities | Programs that help PLA sustain efforts, grow, implement best practices as an association, create external partnerships, and support staff |
| Continuing Education  Project Outcome (Core Work)  Every Child Ready to Read  Family Engagement  Health Literacy and Programming (Health)  Grow with Google (Digital Literacy)  Microsoft/Rural Libraries (Digital Literacy)  Intellectual Freedom  Social Work  Short Story Project  Results Bootcamp | Leadership Academy and other leadership training  Emerging Leaders  Member Engagement  Public Libraries 101  Strategic Planning Training/Support  Theory of Change CE/PD Work | Policy Corps  Awards  External Partnerships  Project Outcome (International Work)  Turning the Page  International/IFLA collaboration (SDGs, Global Vision) | Inclusive Internship Initiative  Insurance Enrollment (Health)  DigitalLearn (Digital Literacy)  EDI Regional Trainings  2020 Census | Governance (Board, Committees)  Membership Recruitment and Retention  Fundraising  Communications  Publications and Products  Technology  Staffing |