Overview

In fall 2013, the PLA Board of Directors reviewed PLA’s strategic plan and agreed that overall the plan remained relevant, but could benefit from a progress review and refinement in focus for a short-term (two to three year) extension. Last updated in 2010, the plan influenced the work of the association over the past few years and led to many successful initiatives under four goals—Advocacy & Awareness, Leadership & Transformation, Literate Nation, and Organizational Excellence (see Appendix B).

At the 2014 ALA Midwinter Meeting, the Board convened a meeting of 40 PLA leaders, including current Board members, committee chairs, PLA past-presidents, and other PLA members. With facilitation from PLA Board members Pam Sandlian Smith and Portia Latalladi, the group reviewed progress on the existing plan and discussed critical issues facing public libraries today. As follow-up, Pam facilitated a secondary discussion at the Spring 2014 meeting of the Board. Many thanks to Pam and Portia for their extra efforts and insight.

Through all these discussions, consistent themes emerged that centered on two of the four PLA goal areas: Advocacy & Awareness and Leadership & Transformation. These themes also surface in membership surveys and program evaluations. The resulting revised strategic plan builds on PLA’s successes to date and focuses the association for the next three years. The desired outcome of the planning process is to guide and create clarity on how PLA should invest its valuable and limited resources to meet the future needs of its members and other stakeholders.

The revised strategic plan includes the following:

- A set of “Assumptions about the Future” for the public library profession the association represents, with revisions made in June 2014. (Appendix A);

- A list of relevant factors in the long-range horizon (10+ years into the future), including a core purpose, core values, Big (hairy) Audacious Goal (BHAG), and a vivid description of future success;

- Goal areas that identify where PLA will direct its energy in the next three years. The goal areas focus on outcomes beneficial to the association and its members based on the 2013-2014 discussions.

- A set of strategic objectives in each goal area that set a measurable target .

- Possible strategies that identify actions the association could undertake in the next 1-2 years in order to achieve each goal area.

Adoption of this next iteration of the plan is an affirmation of the general intent and direction articulated by the vision, goals, and objectives. The leadership of PLA views strategic thinking and planning as an ongoing process within the organization. This is not a strategic planning "project." Therefore progress toward achieving the plan’s objectives will be assessed annually, and the plan will be updated based on achievement and the changing needs of members and stakeholders.
10+ Year Planning Horizon

Core Ideology & Envisioned Future

**Core ideology** describes an organization’s consistent identity that transcends all changes related to its relevant environment. It consists of two elements - core purpose – the organization’s reason for being – and core values – essential and enduring principles that guide the organization. **Envisioned future** conveys a concrete yet unrealized vision. It consists of a Big (hairy) Audacious Goal (BHAG) – a clear and compelling catalyst that serves as a focal point for effort – and a vivid description – vibrant and engaging descriptions of what it will be like to achieve the BHAG.

### Core Ideology

**Core Purpose:** To strengthen public libraries and their contribution to the communities they serve.

**Core Organizational Values:**

- PLA is dedicated to:
  - Visionary Leadership.
  - Member Focus.
  - Integrity and Transparency.
  - Openness, Inclusiveness, and Collaboration.
  - Excellence and Innovation.

### Envisioned Future

**Big Audacious Goal (BHAG):** The public library is the most valued asset in every community.

**Vivid Description of a Desired Future:**

We envision a future where public libraries are recognized as key to building vibrant communities and sustaining a strong democracy. The value of libraries is so deeply ingrained that they are viewed as essential to community vitality and are readily and appropriately funded. The library is an integral member of the community partnering with external community organizations, including service agencies, and acting as liaison between community and government. The public seeks out the library for myriad reasons; and in response the library has shifted its institutional and professional orientation from internal to external, actively engaging its community members to understand (and respond to) their needs and aspirations.

The library provides a pathway to a better future for all community members by serving as the principal destination for individual learning, enrichment, and economic opportunity. Community members are attracted by the library as a learning space where they will find expert assistance, relevant resources and tools for research, content sharing and creation, and opportunity for cultural enrichment. By also providing critical literacy services, enriching formal education, and supporting lifelong learning, public libraries are learning spaces that make America a literate nation. They are an integral component of a successful educational system.
Both the library’s virtual presence and physical space are important, and community members make ample use of the library’s cutting-edge technology and learning spaces to actively engage library resources from home and on-the-go. By providing free access to government information, e-government services, employment assistance and more, the library plays an invaluable role in community members’ lives.

Finally, the Public Library Association (PLA) is an essential partner in transforming libraries and empowering librarians, with membership viewed as a necessity for a successful library career. The Association is instrumental in helping libraries respond to the needs of their communities. Moreover, PLA leads the profession, intuitions trends in an ever-changing environment and matching member needs with superior services. Every public library worker and trustee looks to PLA as a critical educational and training resource. PLA membership represents 100% of North America’s public librarians and public library workers. Members are actively engaged with the association and benefit from the various educational and networking opportunities.
Three Year Planning Horizon (2014-2017)
Outcome-Oriented Goals and Objectives

The following are the PLA’s goal areas for the next three years. These outcome statements define what will constitute future success. The achievement of each goal will move the association toward realization of its BHAG. The goals listed are considered of equal importance and are not necessarily in priority order. Objectives and Strategies provide direction and actions on how the organization will accomplish its articulated goals. Objectives are considered in the 1-2 year planning horizon while Strategies are considered within the three year planning horizon. Success toward achieving the goals and accomplishing strategies are reviewed annually by PLA leadership. The strategies for each objective will be further developed by volunteers and staff and will be incorporated into the plan.

Goal: Advocacy & Awareness

Goal Statement: PLA plays a major role in public library advocacy and in influencing public perception about the library.

Objective (1):
Enhance perception of public libraries through a public awareness initiative.

Objective (2):
Enhance the effectiveness, scope and awareness of PLA/ALA’s advocacy resources.

Objection (3):
Create new advocacy tools and resources through the performance measurement initiative.

Objection (4):
Encourage and equip librarians for participation in all levels (federal, state, local) of public library advocacy.

Goal: Leadership & Transformation

Goal Statement: PLA is a leading source for learning opportunities to advance transformation of public libraries and helps to position the library’s institutional and professional orientation from internal to outward toward the community.

Objective (1):
Help define and support the transition of public libraries to learning spaces.

Objective (2):
Continue to increase leadership development and training opportunities designed to support public library staff in leading change and transforming library service.

Objective (3):
Increase opportunities to share best practices and next practices in public libraries with a focus on librarians as community leaders who play a critical role in addressing community priorities.
Objective (4):
Integrate the shift in library orientation from internal to external into PLA training and resources.

Objective (5):
Influence Library School curriculum that supports public librarians.

Goal: Literate Nation
Goal Statement: PLA is a leader and valued partner of public libraries’ initiatives to create a literate nation.

Objective (1):
Continue to increase awareness of the many types of literacy necessary for success for 21st century skills development and success.

Objective (2):
Continue to enhance public libraries’ abilities to provide literacy services in their communities.

Goal: Organizational Excellence
Goal Statement: PLA is positioned to sustain and grow its resources to advance the work of the association.

Objective (1):
Maintain a financially stable operating model.

Objective (2):
Increase the number of income generating products and programs.

Objective (3):
Understand and adapt to new trends and models in association organization and membership.

Objective (4):
Enhance relationships with library organization partners as well as with non-library organization partners.
Appendix A

Assumptions about the Relevant Future

In order to make progress toward the Envisioned Future, an association must constantly anticipate the strategic factors likely to affect its ability to succeed and to assess the implications of those factors. This process will help PLA to constantly recalibrate its view of the relevant future and provides a basis upon which to update the strategic plan. The outcome-oriented goals of the strategic plan are based on this foresight; therefore; annual review of these “Assumptions” is an appropriate method of determining and ensuring the ongoing relevance of the strategic plan.

Assumptions
(Updated June 2014)

Economic Factors and Global Business Environment

1. While the previous dire economic conditions have lessened, library budgets will continue to be constrained with more competition for the same or shrinking pot of funds and increased expectation for accountability.
2. Private fundraising, as well as other forms of alternative funding streams, will become more and more necessary.
3. Libraries must be able to demonstrate return on investment (ROI) to the public and to decision-makers.
4. Current sources of state, local, and/or federal funding for public libraries may change, shrink or go away.
5. There is increasing skepticism toward public funding of libraries as a public service, which is reflective of increasing skepticism of all public services.
6. Library services will continue to be viewed as discretionary as opposed to schools, which are viewed as mandatory.
7. There will be an increase in partnerships and in pooled and/or shared resources in response to smaller overall budgets.
8. The economics around the publishing industry and the transition to electronic content will continue to change, impacting the delivery of services at the library.
9. There will be limits to the amount of private funding available along with more competition for those dollars.
Legislation and Regulation

1. The legal environment will require more time, energy, and expertise.
2. Copyright and digital licensing will continue to evolve and be volatile.
3. Confidentiality/privacy will become more complex and will affect patron use, records, maintenance, and requirements for registration, data collection and marketing
4. Employment law will become more complex and require greater management and increased overhead costs.
5. Funding laws and regulations on tax limitations will threaten funding.

Social Values and Politics

1. Stratification of social values will continue, creating more tension between conservative and liberal views.
2. National, state, and local political agendas will change and the public’s support for those political agendas will continue to fluctuate.
3. Public libraries will remain a symbol of democracy providing a strategic opportunity for growth and financial support.
4. Libraries will continue to focus on not only having a seat at the decision-making table but setting the table.
5. The library as a place for the community to congregate will continue to grow.
6. The library as a place for content creation will continue to grow.
7. Definitions of family will continue to change.
8. Libraries will continue to be viewed as “in loco parentis.”
9. The growing national volunteerism movement could translate to potential value for libraries.
10. There is increased expectation that libraries will incorporate sustainable practices into their operations.
11. The library will have a greater role in civic discourse.
12. Reading will continue to be a critical skill to succeed in life.
13. The library’s role in support of lifelong learning will continue to increase.
**Demographics**
1. The need for a more diverse library staff will increase in order to reflect changing communities.
2. Library staff will continue to stay in the workforce longer, thereby reducing opportunity for new library staff.
3. The value of interacting with others will continue, but the tools and approaches will continue to change (i.e. face-to-face versus online social networking tools, etc.).
4. Trends in the way education is delivered will continue to affect the role of and the services provided by public libraries.
5. New immigrants from countries without a public library tradition will need assistance in understanding the role and services of the American public library.
6. The socioeconomic gap will continue to grow and the income level defining poverty will continue to rise.
7. The general population will live longer and be more active.
8. The next generation will not be better off than their parents.
9. More and more people will use the library’s technology resources.
10. Changes in demographics will influence the ways people interact and behave in public spaces, including public libraries.

**Technology and Science**
1. Technology will allow libraries the opportunity to attract and serve new client groups.
2. Technology will affect everything libraries do.
3. Technology training will continue to be a challenge.
4. Online social networking will continue to evolve.
5. There will be a greater interest and demand for user-generated content.
6. Patrons will expect multiple access modes to the library, different for each person.
7. Libraries will continue to be a technology safety net for a large percentage of the population.
8. There will be a greater need for assistive technology.
9. Technology will give libraries the opportunity to provide services on a one-to-many basis.
10. As technology expands there will be changes in the way people access personal health and government records.
11. As state and local governments downsize there will be more requirements for libraries to provide access to eServices.
12. Reliance on technology for everyday life will continue to grow.
13. Technology will allow libraries of offer customized services.

**Professional Competition and Structure**

1. There are major competitors that have a huge penetration in the market and they will continue to grow.
2. There will be a continued threat to our status as information providers and less understanding by the public of the difference between libraries and their competitors.
3. The traditional structure of libraries makes it harder for them to change.
4. The nature of our work with the public is changing and the traditional staffing structure will have to be adjusted.
5. In order to remain competitive libraries will need to have a more and external, customer-focused orientation.
6. Many library competitors will continue to have better resources and larger budgets.
7. Our funders will know organizations like Google and Amazon and what services they provide better than they know libraries.
8. There may be a tension between our need to market and collect critical user data and the expectation that we should not use public funds for marketing.
9. There may be less enthusiasm for the public library as a public good.
10. Due to local funding structures, it will be more difficult to get economies of scale in financing of libraries, in comparison to our national and international competition.
11. Due to libraries’ financial structure, it will be difficult for libraries to invest in research and development.
12. Libraries will continue to be conflicted between maintaining a nonprofit business model and providing services.
13. Libraries will continue to be constrained by the ability and interest of the vendors in delivering solutions.
14. There may be a tension between our need to collect critical user data and librarians’ value of privacy.
15. There will be an increased emphasis on partnerships to extend the library’s reach and to cooperatively address community goals.