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ACRL Planning Cycle Process and Deadlines

Overview

The ACRL Board is responsible for stewarding the association's implementation of its strategic plan, the [Plan for Excellence](#). The Plan for Excellence details the Board's vision for ACRL's initiatives related to the Value of Academic Libraries, Student Learning, and Research and the Scholarly Environment. The Board has vested three strategic goal area committees with the responsibility for identifying specific activities to accomplish ACRL's strategic objectives. The Board works closely with its three strategic goal area committees as well as all division-level committees to establish a cohesive and comprehensive association-wide plan for action.

The ACRL planning cycle includes both detailed planning for the current year as well as planning for future years as appropriate to ensure that ACRL has the resources and foundation in place to realize ACRL's strategic goals. The Committee chair, vice-chair, board liaison, and staff liaison comprise a leadership team responsible for accomplishing committee's charge.

Work plan preparation responsibility

Division-level Committee chairs have been tasked by the Board with preparing annual committee work plans in coordination with the committee vice-chair, Board and staff liaisons, and committee members. Component Committees are also expected to coordinate work plans with Coordinating Committees and Coordinating Committee chairs are expected to establish a timeframe and lead coordination efforts. Annual committee work plans should address responsibilities included in the committee charge as well as any additional special projects committees plan to undertake to advance ACRL's strategic goals.

Work plan review responsibility

Each **Board liaison** is responsible for:

1. Providing feedback in concert with staff liaison to committee on its draft annual work plan in order to collaboratively develop the final work plan. (A review checklist is available at <http://www.ala.org/acrl/resources/policies/chapter3#3eleven>)
2. Approving the final work plan via email.
3. Scanning the work plans, identifying any activities that relate to the strategic goal initiatives and then sending such activities to the attention of the chairs of the strategic goal area committees, Board members serving on the goal area committees, and the staff liaisons of the strategic goal area committees.
4. Providing support (working with the staff liaison) to the committee as the work plan is implemented throughout the year.

Strategic initiative planning grid responsibility

Strategic Goal Area Committees have been tasked by the Board with preparing an overview of the association's strategic goal area initiative plans using the Strategic Initiative Planning Grid in addition to preparing annual committee work plans. In both planning processes, these committee chairs will work closely with their committee vice-chair, Board and staff liaisons, and committee members.

Date Due	Action(s)	Responsible Party
Late May	<ul style="list-style-type: none"> Submit KPI data for Annual Conference Third Quarter KPI report by Board document deadline 	Strategic goal area committees,
Approx. 2 weeks before Annual Conference	<ul style="list-style-type: none"> Submit Annual Conference agendas (<i>Note: Agenda should include review of draft year-end report and coming year's work plan.</i>) to ACRL staff via email to Katie Coombes (kcoombes@ala.org) Post Annual Conference agendas to committee's ALA Connect space Draft year-end report and ideas for coming year's work plan documented and distributed to committee and liaisons (and coordinating committee as appropriate) for review prior to Annual Conference. <i>Note: documents should be posted to the committee ALA Connect space.</i> 	Committee chair and vice-chair
	<ul style="list-style-type: none"> Draft long-range initiative ideas that address Plan for Excellence strategic goal area objectives. These ideas will be highlighted in the Strategic Initiative Planning Grid to give the Board a high-level look at progress on the Plan for Excellence. <i>Note: documents should be posted to the committee ALA Connect space.</i> 	Strategic goal area committee chair and vice-chair
Annual Conference or virtual meeting (Typically third week of June)	<ul style="list-style-type: none"> Discuss draft year-end report Discuss annual committee work plan ideas for coming year 	All committees, Board and staff liaisons
	<ul style="list-style-type: none"> Discuss the long-range initiative ideas for appropriate strategic goal area objectives that will be placed on the Strategic Initiative Planning Grid Add initiative ideas to the Strategic Initiative Planning Grid; turn in to staff liaison by August deadline Participate in Board meeting 1 for the Plan for Excellence agenda item 	Strategic goal area committees, Board member serving on the committee, staff liaisons
No later than July 1	<ul style="list-style-type: none"> Finalize and post year-end report to committee's ALA Connect space by outgoing chair for access by incoming chair. <i>Note: after July 1, the previous year's Committee chairs will not have access to committee's ALA Connect space.</i> 	All Committee chairs completing term
No later than July 13	<ul style="list-style-type: none"> Using the year-end report and work plan template posted to the committee's ALA Connect space, current committee chair fills in the coming year's work plan grid for each project planned in the coming year detailing intermediate deadlines, committee members responsible, resources needed, and anticipated outcomes. <i>Note: Chairs should work with committee members and liaisons throughout the process. In particular, Board liaisons should be kept informed of activities related to strategic goal areas.</i> 	Committee chair
	<ul style="list-style-type: none"> Conduct initial scan of work plan done for activities related to strategic goal areas in order to ensure coordination and communication with strategic goal area committees. Send relevant work plans to the strategic goal area chairs and vice-chairs, the Board member serving on goal area committees, and the staff liaisons to the goal area committees 	Board liaison and staff liaison

Date Due	Action(s)	Responsible Party
July 13-20	<ul style="list-style-type: none"> • Working with staff liaison, identify and coordinate next steps for communication and coordination with strategic goal area committees as needed. • Working with staff liaison, communicate feedback regarding the draft annual committee work plan to committee chairs and vice-chairs. 	Board liaisons
No later than August 1	<ul style="list-style-type: none"> • Finalize work plans in coordination with committee members, liaisons, and strategic goal area committees as appropriate. 	Committee chair
	<ul style="list-style-type: none"> • Approve the final work plan via email (with copy to vice-chair and staff liaison) and remind committee chair to: <ul style="list-style-type: none"> ○ post as a final document to the committee’s ALA Connect Community ○ submit to the ACRL office via email to Katie Coombes (kcoombes@ala.org) ○ commence work plan activity 	Board Liaison
August 1	<ul style="list-style-type: none"> • Post final work plan to the committee’s ALA Connect Community • Submit final work plan to the ACRL office via email to Katie Coombes (kcoombes@ala.org) • Commence activity to carry out the work plan 	Committee chair
August	<ul style="list-style-type: none"> • Submit draft strategic initiative planning grid for appropriate goal area to ACRL office via committee’s staff liaison • Draft KPIs for next fiscal year for discussion at Board SPOS 	Strategic goal area committees
	<ul style="list-style-type: none"> • Review committee work plans and identify select, relevant activities that advance any of the three strategic goal areas planned for coming years for addition to the Strategic Initiative Planning Grid 	Board and Staff liaisons
	<ul style="list-style-type: none"> • Review compilation of annual committee work plans for current year and Strategic Initiative Planning Grid • Develop framework for discussion of gap analysis and ACRL’s progress in advancing its Plan for Excellence • Suggest any needed updates to the Strategic Initiative Planning Grid • Identify items for discussion such as perceived gaps or resource challenges for the Board’s Strategic Planning and Orientation Session (SPOS) agenda 	President, Board members serving on strategic goal area committees, Executive Director, and Staff liaisons
No later than September 1	<ul style="list-style-type: none"> • Submit draft KPIs for next fiscal year for discussion at Board SPOS via email to staff liaison 	Strategic goal area committees
At Board SPOS (September)	<ul style="list-style-type: none"> • Facilitate discussion at SPOS regarding any perceived gaps, resource challenges, etc. identified in the Strategic Initiative Planning Grid and annual work plan process 	President, Board members serving on strategic goal area committees, Executive Director, and Staff liaisons

Date Due	Action(s)	Responsible Party
October	<ul style="list-style-type: none"> • Make any needed updates to annual work plans based on discussion at Board SPOS • Post revised annual work plan to committee’s ALA Connect space; submit to the ACRL office via email to Katie Coombes (kcoombes@ala.org) 	Strategic goal area committee chairs
	<ul style="list-style-type: none"> • Revise the Strategic Initiative Planning Grid as needed based on discussion at Board SPOS • Post Strategic Initiative Planning Grid as appropriate to strategic goal area committees ALA Connect space 	Staff
Ongoing	<ul style="list-style-type: none"> • Check in with chair of committee for progress update coinciding with key deadlines in the work plan 	Board liaisons
	<ul style="list-style-type: none"> • Keep Board and staff liaisons informed of committee activities 	Committee chairs
	<ul style="list-style-type: none"> • Submit quarterly KPI data: <ul style="list-style-type: none"> ○ Fourth quarter report due for Fall Executive Committee meeting document deadline (late September) ○ First quarter due for Midwinter document deadline (early December) ○ Second quarter report due for Spring Executive Committee meeting document deadline (early April) ○ Third quarter report due for Annual Conference document deadline (late May) 	Strategic goal area committees