Oregon Library Association
Strategic Planning – Board Session
7.25.2016

Coraggio Group
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OLA: Project Timeline

- **APR**
  - Project Planning / Survey / Focus Group / Insight Report

- **MAY**
  - Session #1 – May 16th
    - Insight Presentation / Strategic Clarity Kick-off / Homework
    - BOD Check-in – June 3rd

- **JUNE**
  - Session #2 – June 16th
    - Complete Get Clear / Begin Get Focused / Begin Get Moving / Homework
  - Session #3 – July 7th
    - Complete Get Focused / Complete Get Moving / BOD Prep

- **JULY**
  - Draft Plan Creation / Final Plan Review with BOD – July 25th
## Oregon Library Association: Strategic Direction 2017-2019

### Areas of Focus

<table>
<thead>
<tr>
<th>Vision</th>
<th>Mission</th>
<th>Reputation</th>
<th>Unique Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the ideal future state we are trying to create?</td>
<td>What is our purpose? What are we here to make happen?</td>
<td>What do we want to be known for? What's the enduring perception or emotion that describes the total experience of our organization?</td>
<td>What unique &amp; sustainable value do we deliver, where do we deliver it, and for whom?</td>
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#### FOCUS

<table>
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<th>What must be accomplished over the planning horizon?</th>
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<td>How do we measure our success?</td>
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#### ACTION

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<th>What collective actions do we need to take, that are transformative in nature?</th>
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#### Objectives

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<th>Initiatives</th>
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STRAEGIC CLARITY
What is the ideal future state we are trying to create?

A strong Oregon library network empowered locally and engaged nationally.
OLA provides advocacy, education, leadership and collaboration to continually strengthen Oregon’s libraries and the communities we serve.
Supporting and Advocating for Oregon libraries and the dedicated teams that staff them, OLA creates the space for:

• Equal access to a wide-range of professional development, education, and collaborative opportunities.

• A diverse mix of library professionals to work, learn, develop, and thrive together.

• Policy advocacy at the legislative and community level.
REPUTATION

What do we want to be known for? What’s the enduring perception or emotion that describes the total experience of our organization?

RECOMMENDATION

Welcoming

“They are approachable and inclusive.”

Adaptive

“They listen and respond to the needs of the organization and its membership.”

Respected

“They understand and value my opinion.”

Energizing

“They empower me.”

Effective

“They make a difference.”
STRATEGIC FOCUS & ACTION
Planning Cascade

Strategic Area of Focus
(including objectives)

Initiative

Initiative

Initiative

Three-Year Timeframe

One to Three-Year Timeframe

One-Year Focus

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Strategy

Action

Action

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Examples – How it all works together.

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<tr>
<th>Plan Element + Definition</th>
<th>Example</th>
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<tr>
<td><strong>Strategic Area of Focus</strong>&lt;br&gt;What must we accomplish during the planning horizon? What are the overarching areas of focus for the OLA?</td>
<td>• Develop exceptional tools and enabling technologies</td>
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<tr>
<td><strong>Objectives</strong>&lt;br&gt;How will we know when we are successful? What specific result(s) will we accomplish?</td>
<td>• Increase monthly usage year-over-year&lt;br&gt;• Receive annual satisfaction score of X+</td>
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<tr>
<td><strong>Initiatives</strong>&lt;br&gt;What are the big strategic endeavors we will undertake that have with Port-wide impact? (Some initiatives may not span the full five-year timeframe)</td>
<td>• Create a high-functioning and high-value website</td>
</tr>
<tr>
<td><strong>Strategy</strong>&lt;br&gt;How will we compete and win? How will we organize our approach in order to achieve our objective?</td>
<td>• Upgrade the OLA website</td>
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<tr>
<td><strong>Action Step</strong>&lt;br&gt;What specific action will we take?</td>
<td>• Evaluate/audit the existing website</td>
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1. Enhance and expand OLA Professional developmental opportunities and programs.

2. Improve the means and effectiveness of OLA communication.

3. Strengthen OLA’s leadership and advocacy role across Oregon.

4. Increase engagement in OLA and enrich the membership experience.
Oregon Library Association: Strategic Direction 2017-2019

**Vision**
A strong Oregon library network empowered locally and engaged nationally.

**Mission**
OLA provides advocacy, education, leadership and collaboration to continually strengthen Oregon's libraries and the communities we serve.

**Reputation**
- Welcoming
- Adaptive
- Respected
- Energizing
- Effective

**Unique Role**
Supporting and Advocating for Oregon libraries and the dedicated teams that staff them, OLA creates the space for:
- Equal access to a wide-range of professional development, education, and collaborative opportunities.
- A diverse mix of library professionals to work, learn, develop, and thrive together.
- A library voice at the political, educational, and community levels.

**Areas of Focus**
- Enhance and expand OLA Professional developmental opportunities and programs.
  - Increase OLA Conference attendance number W-F (Target TBD)
  - Increase OLA Conference attendance number Saturday (Target TBD)
  - Broad/balanced OLA Conference attendance from all library types (Target TBD)
  - Year/Year improvement on professional development satisfaction survey scores (Targets TBD)

- Improve the means and effectiveness of OLA communication.
  - Usability test scores of X (Targets TBD)
  - Year/Year improvement on communication satisfaction survey scores (Targets TBD)
  - Increase of website page views and visit duration.
  - Year/Year improvement on communication satisfaction feedback from Divisional/Task Force Leadership (Targets TBD)

- Strengthen OLA’s leadership and advocacy role across Oregon.
  - Measure of outreach: events, speaking engagements, communications, etc.
  - Attendance at Legislation Says increases to #/% by (date)

- Increase engagement in OLA and enrich the membership experience.
  - Annual survey shows OLA as “welcoming”
  - Percentage of library professionals/staff within Oregon are OLA members
  - Increase of membership and retention year/year
  - Year/Year improvement on engagement satisfaction survey scores (Targets TBD)

**Objectives**

**Initiatives**
- Assess and design a compelling annual professional development program offering.
- Establish qualitative feedback (Multiple focus groups/year) for greater insight.
- Improve/explore alternative professional development delivery mechanisms.

- Evaluate and elevate the OLA website's form, function and user experience.
- Improve active marketing and promotion of OLA's brand and benefits.
- Ensure higher levels of communication performance with dedicated resources.
- Improve OLA'S institutional knowledge, documentation, and management system(s) (including alignment of work group roles and responsibilities for information capture and management).

- Develop revolving corp. of OLA champions focused on library advocacy (marketing and promotion). Note: Initial start with Exec. Comm.
- Continue to develop and deliver critical legislative advocacy work annually.
- Migrate OLA from peripheral to integral to the Oregon's education system.

- Build broader OLA access opportunities for library support staff.
- Develop and implement a targeted outreach program.
- Establish an Eastern/Regional advocacy position and support.
- Build a “quick strike” project capability for OLA members to provide easy and simple ways to participate.
- Reimagine the HOTLINE and the tools we use to deliver information.
- Build and improve inter-regional network relationships.
OPERATIONAL PLANNING
**Operational Planning Elements**

**Tactics**
What specific activities must we accomplish in order to successfully achieve our initiatives in this biennium?

**Priorities**
Which tactics **must** start during this planning cycle? Which ones **should** start? Which would be **nice** to start, but might not be critical?

**Dependencies**
What are the organizational interdependencies we must keep front-of-mind? Where will inter-departmental and external collaboration exist?

**Timing**
When will each activity begin? Over what period of time will the tactic be active?

**Owners**
Who is responsible for managing and communicating the progress and completion of each tactic?

**Budget Impact and Integration**
What kind of impact will this tactic have on the budget? How will this flow into the financial planning process?
Have Clear Ownership:
Assign an owner to serve as the point person to ensure the groups are meeting and the plan is being reviewed

Make It A Living Document:
Over the first few cycles, initiatives, action items, timing and priorities will continue to shift based on the priorities of the organization. Keep adjusting based on the association’s needs

Progress Over Perfection:
Encourage everyone to continue to make progress – even if they are small steps, celebrate the successes and learnings

Remember Your Role as Change Leaders:
As the association implements the operational plan, the organization will start to shift to the desired future state. Keep your radar tuned into the personal transition needs of the work groups

Keep Communicating:
Share the progress and communicate any changes to keep everyone informed