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21 January 2022

**TO: RAILS Board of Directors**

**FROM: Deirdre Brennan**

**SUBJECT: Strategic plan**

Board members, we will be discussing our draft strategic plan in a special session on the morning of January 28 and then again in our regular monthly meeting in the afternoon.

The executive summary prepared by Stephanie and Cindy provides excellent background on the development of the plan. We have also included the final draft of the plan; it has been reviewed multiple times by the RAILS executive team. You will see two vision statements; we like them both and await your input. We have also included sample measurements for each objective – there will be additional measurements when we develop our action plan this year, as part of the APC grant application.

I am extremely pleased with the plan, both the document and the process. I hope you will be also, and I look forward to our discussion.

# RAILS Strategic Plan: Executive Summary

Starting in June 2021, RAILS began the process of developing its new strategic plan. The process was led by Stephanie Chase and Cindy Fesemyer of Constructive Disruption in partnership with RAILS leadership, and continued through early January 2022.

## The Process

Several values were fundamental to the process of developing the new strategic plan: to ensure member library staff input, and to ensure the input shared by member library staff made a meaningful and visible contribution to the final product.

It was important to RAILS for the process of developing the new plan to be member-focused, ensuring member library staff were able to have a leadership role in sharing their ideas, shaping the goals and objectives, and expressing their expectations for RAILS. The contributions of member library staff were then further developed and shaped by the participation and experience of RAILS staff, and ultimately codified by the Board.

The process began with a thorough review of key historical documents, reports, and statistics, as well as member comments throughout RAILS' history. Constructive Disruption looked for key repeated themes that pointed to opportunities and expectations for RAILS throughout the past decade. In addition, RAILS used the summer of 2021 to celebrate its 10th anniversary, highlighting successes and reaching out to member libraries for stories, thoughts, and contributions to the celebration. The themes from both the historical research and the celebrations helped build concepts for potential goals with member-led perspective in each step of the process.

To ensure an open, collaborative process, a significant number of meetings were held:

- Informational session at the September 2021 Member Update;
- Two rounds of four virtual town halls each, with the first round in early October 2021 focused on exploring the goals and developing potential objectives and the second in mid-November 2021 on member expectations;
- Ten hours of focus groups and one-on-one interviews, including sessions specifically for member library staff at school, academic, and special libraries and key partners;
- An introductory session for staff in August 2021 to cover the project as a whole, followed by two special staff-only virtual town halls in October 2021 and a wrap-up session for staff in December 2021;
- Several sessions with the executive leadership team of RAILS;
- Multiple informational sessions for the Board, including a kick off in July and a wrap up in November, as well as a Board focus group.

Constructive Disruption worked with RAILS to develop and support a Strategic Plan Steering Committee. This committee included RAILS staff, the RAILS Board, and member libraries representing school libraries, academic libraries, special libraries, and public libraries. The Strategic Planning Steering Committee members served as advocates and cheerleaders with

*prepared by Constructive Disruption – January 2022*

their colleagues for the process, supported colleagues in their participation at both rounds of town halls, including serving as note takers and small group facilitators, and, importantly, worked together to develop the new mission statement and the framework for the new vision statement. Members of the Strategic Planning Steering Committee, in addition to attending the member meeting, the town halls, and committee meetings, also participated in a week-long brainstorming session in December 2021 that combined group and independent work to develop plan goals and objectives taken from member contributions. The plan was further shaped by Constructive Disruption and finalized by RAILS leadership.

In recognition of the ongoing COVID-19 pandemic, which carried through the entire planning process, all engagement (with the exception of the Board kickoff meeting) was held virtually. A combination of tools was used to support participation, including breakout rooms in Zoom, in-the-moment anonymous polling using Poll Everywhere, and collaboration tools Padlet and Jamboard. Proposed language, goals, and objectives were captured using Google Docs and member library staff were able to comment and suggest changes and additions directly in the documents.

## **Participants**

RAILS welcomed hundreds of member library representatives to virtual meetings. More than 650 members attended and contributed to strategic planning meetings.

Members of the Strategic Planning Steering Committee include:

- Miguel Figueroa
- Nincy George (RAILS staff)
- Juanita Harrell
- Richard Kong
- Mary Jo Matousek
- Pennie Miller
- Estevan Montaña
- Stacy Palmisano (RAILS staff)
- Carmen Patlan
- Scott Pointon (RAILS Board)
- Anne Slaughter (RAILS staff)
- Tom Stagg (RAILS Board)
- Alissa Williams
- Mary Witt (RAILS staff)

and was led in partnership with Constructive Disruption by RAILS Executive Director Deirdre Brennan and Associate Executive Director Monica Harris.

## **From Strategy to Implementation**

Throughout the process, it was emphasized that a strategic plan is intended as a useful and flexible tool to highlight the priorities and areas of investment for an organization. A strategic plan is not intended to highlight everything an organization does as part of its operation, but rather specific, strategic areas of focus for a set period of time. It is particularly crucial for a multi-type membership organization like RAILS to adopt a plan with goals not clearly read as serving one member library type over another, particularly when collaboration and connection, as is the case with RAILS, are main driving values.

The details of implementation, including how the plan might focus on, benefit, or support specific member library types, will be found in the plan's action steps. Action steps are laid out by staff in a separate document that is reviewed and developed on a more frequent basis, ensuring organizational flexibility. RAILS has a long-standing and robust practice of annual action planning and reporting. This will continue in the implementation of the new plan, and it is in this action planning where we will see projects and initiatives that may focus more strongly on a specific member library type.

## **Plan Themes**

It was clear throughout the process that members look to RAILS for inspiration and leadership. RAILS members believe RAILS to be a strong and effective voice for collaboration and leadership, see the strength in RAILS' capacity to communicate on their behalf, and value the power behind RAILS' unified communication. Many members refer to this in shorthand as "advocacy," which came up throughout engagement sessions; this refers not to legislative advocacy or lobbying, but to the power of collaborative and unified messaging.

While there are areas where members expect to see more immediate results, such as an increased investment of resources or a positive change in output measures (an example would be an increased number of trainings offered in a specific area or focus), overwhelmingly, member libraries expect RAILS' activities to lead to long-term impact. Member libraries want to see RAILS function in this higher-level, longer-term space, and understand it may not lead to significant change until years down the line. This is closely tied with the belief in the powerful, unified voice of RAILS and the help expressed as needed by many smaller public and school libraries to communicate their value to their local legislators, boards, districts, and/or jurisdictions.

RAILS is clearly seen as a leader, with a strong staff, with members looking to RAILS in times of trouble and when in need. Member libraries assume RAILS will continue to be "the best," and mentioned several areas for potential continued growth, including expanding already popular

programs and services. Members would like RAILS to dismantle the silos — library type, geography, library size — that separate members from each other, as all library types feel isolated in some way and crave connection to a larger community of practitioners. Members also see increased collaboration with different library groups with similar aims as essential.

# Draft RAILS Strategic Plan

January 2022

Vision: **People thrive when libraries thrive**

**-OR-**

**All libraries are seen as essential to anyone who lives, works, or goes to school in the state of Illinois.**

Mission: **We Connect Libraries**

Strategic Goal 1: **RAILS provides leadership in ensuring sustainable, equitable resource sharing for all member libraries.**

Objective 1: Enhance the sharing of knowledge and best practices through member networking and communications between all types of libraries.

*Measure: Consistent improvement and impact in member library satisfaction with training, networking, and communications.*

Objective 2: RAILS will expand cooperative purchasing activities to increase member libraries access to resources and reduce library costs and duplication of expenditures.

-or-

Leverage economies of scale to provide greater purchasing power for member libraries so they can offer more resources to their customers than they would be able to afford on their own.

*Measure: An increase in cooperative purchasing activities saves libraries money and expands their resources for users.*

Objective 3: RAILS will continue to seek greater efficiencies, innovations, and enhancements to delivery services

*Measure: Sustained improvement in delivery-related efficiency statistics.*

Objective 4: Work collaboratively with members, IHLS, and ISL to identify and support appropriate and affordable shared catalog solutions and expand resource sharing to all libraries and residents.

*Measure: Additional libraries participating in resource sharing activities*

**Strategic Goal 2: RAILS models best practices in equity, diversity, accessibility, and inclusion.**

Objective 1: RAILS will provide leadership in developing and providing resources that will support member libraries' efforts to provide equitable, diverse, and inclusive services.

*Measure: RAILS will significantly invest in tools, communication, and professional development that support EDI efforts in member libraries.*

Objective 2: Examine all aspects of RAILS policies, procedures, and core services through an equity lens and make needed improvements.

*Measure: Continue full evaluation by the Climate Team and implement needed changes.*

Objective 3: Work with RAILS members to identify and implement ways to diversify Illinois library boards and staff in order to increase representation and better reflect the communities they serve.

*Measure: RAILS will communicate progress and partner with RAILS membership in diversifying Illinois library boards and staff.*

**Strategic Goal 3: RAILS assists member libraries in preparing for the future.**

Objective 1: Leveraging RAILS' power and influence in the Illinois library community, work collaboratively for additional funding for all types of libraries to ensure that libraries have the staffing, technology, and infrastructure needed to offer essential and cutting-edge services to their communities.

*Measure: Libraries use RAILS standards and recommended best practices to advocate successfully for additional funding*

*Measure: Long term, as an impact measure, did libraries across member types see increased support and/or funding?*

Objective 2: Help member libraries of all types and sizes to demonstrate their value to their different stakeholders.

*Measure: Member libraries report increased confidence in and ability to articulate the value of their library when using RAILS resources.*

Objective 3: Professional development and member engagement efforts are future-focused, crossing library types and specific to individual library type needs.

*Measure: Increased diversification of professional development and member engagement.*

**Strategic Goal 4: RAILS leads alongside member libraries to develop and strengthen the Illinois library community and expand services to all.**

Objective 1: RAILS will continue to strengthen collaborative relationships with partner library organizations, including the Illinois State Library and Illinois Heartland Library System.

*Measure: Increase in the number of collaborative projects.*

*Measure: Establish consistent and ongoing RAILS/Heartland leadership meetings.*

Objective 2: RAILS will continually seek to understand member perceptions of inequities of system services in order to better support academic, specialized, and school libraries, as well as public libraries of all sizes.

*Measure: Develop an outreach plan that will enable RAILS to understand and address member perceptions of inequities of service.*

Objective 3: Continuously evaluate RAILS programs and services to ensure that they are having an impact and are helping to create the best possible future for all of our libraries.

*Measure: Achieve the goal, continuously improving member satisfaction.*

Objective 4: Collaborate with Illinois State Library and Illinois Heartland Library System and other partners to develop a plan and timeline for achieving universal service.

*Measure: Decrease in unserved every year.*