



Organizational Plan

2014-2018

February, 2014

EXECUTIVE SUMMARY

COSLA is an independent organization of the chief officers of state and territorial agencies designated as the state library administrative agency and responsible for statewide library development. Now in its 40th year, COSLA has put forth a five-year organizational plan in service of two overarching goals: that libraries are better able to deliver services to patrons and the general public and that libraries are valued for the breadth of services they offer. By doing so, COSLA seeks to be at the forefront of an ever-shifting landscape for libraries in which expectations of the role libraries can and should play in our communities are being redefined.

COSLA's strategic framework will guide its work for the next five years as the organization becomes a stronger, more proactive actor in support of libraries. The framework leverages COSLA's particular value to the field: national reach, a network of peers in state libraries, cross-state lens, recognized field leadership, and ability to be a channel partner to make progress in its key areas of focus.

1 Strengthen State Library Agencies

- 1) Increase the knowledge, skills, and leadership capacity of State Library Agency staff
- 2) Share expertise across states to enhance the effectiveness of state programming for libraries
- 3) Equip agency staff to make the case for the sustained value of state library agencies

2 Strengthen the Library Field

- 1) Proactively engage in national projects and library initiatives
- 2) Promote supportive federal policies and sustainable funding for all libraries
- 3) Form strategic partnerships within and beyond the library field to benefit all libraries

COSLA has established an ambitious set of priorities for 2014-2018. These priorities and potential activities will enable COSLA to have a much greater impact on state library agencies and the library field, as well as provide better service to members. But delivering on these expanded priorities will take a level of capacity that COSLA currently does not possess. While members will continue to play critical roles, in 2014, COSLA is "making the leap" to secure executive director services. This is an important inflection point for COSLA, which came about based on an examination of its current activities and aspirations for the next five years. The COSLA of the future will provide a much greater degree of value to state library agencies, while also playing a more dynamic role in advancing the value of libraries in the United States.

LETTER FROM THE PRESIDENT

Dear Fellow Chief Officers,

As we look ahead to our fifth decade as an organization, I am pleased to share with you our new organizational plan. This plan arose from the realization that, in its 40th year of operation, COSLA was at a strategic crossroads.

We are experiencing dramatic changes in the library landscape, creating new challenges for state libraries as well as new opportunities. The digital age is fundamentally transforming the role of libraries, challenging them to reimagine the services they provide to their communities. At the same time as libraries are facing multiple new demands from patrons, the resources available to serve those needs have been steadily declining, as state and local governments felt the pinch of the recession. Yet federal agencies and national funders are increasingly seeing libraries as potential partners that can help them reach deeply into communities. This interest has in turn spurred both the development of new nonprofit organizations and the proliferation of activities among existing organizations to initiate, manage, and coordinate programs as well as advocate for libraries. All of this activity has created exciting opportunities for collaboration and new partnerships, and a need for every organization to clearly define its roles and priorities to have the maximum positive impact on the field.

State library agencies are also at a crossroads, with many poised for changes in leadership in the next few years. There is a need to develop the next generation of state library leadership and ensure that they have the guidance and resources to succeed in their roles. The Institute of Museum and Library Services (IMLS), which has been a valuable source of support, will also undergo a leadership change in 2015 and an IMLS director from the museum field may have different priorities for the agency. Finally, COSLA itself has evolved over the years and has lately taken on a number of new activities.

In order for COSLA to successfully navigate all these shifts, the Board felt it was important to take a step back and go through an organizational planning process. Therefore, in February 2013 we requested funds from the Bill & Melinda Gates Foundation to support organizational planning to better position COSLA to deliver value to our members and to generate greater influence and impact in the library field.

Working with Sarah Chesemore, FSG, and AMR, we've explored the following strategic questions:

- What existing roles should COSLA maintain and what new role(s), if any, should COSLA take on, and at what level?
- How do these roles create value for COSLA's members? When should COSLA take a more active versus reactive approach to its roles and activities?
- What capacity is required to succeed in each role in terms of organizational capabilities, operating norms and financial structure? Does COSLA have or can it develop that capacity?

As new opportunities continue to come our way, we are confident that the priorities in this plan will enable COSLA to be intentional and strategic about which to pursue. The plan also lays out why we need and how we will use additional organizational capacity to extend COSLA's reach and expand its influence and impact.

In crafting this plan, we strove to preserve what members most value about COSLA – the camaraderie, the forum for connecting with peers, and the formal and informal networking with national partners – while also developing new capacities that will enable COSLA to better serve members and the library field. Together, these recommendations entail a significant pivot for COSLA as an organization. It will take time for COSLA to grow into these new capacities, but we are confident that the COSLA of the future will provide a much greater degree of value to members, our staffs, and our agencies, while also playing a more dynamic role in advancing the value of libraries in the United States.

Sincerely,
Ann Joslin (ID)
COSLA President 2012-2014

II. COSLA'S HISTORY AND COSLA TODAY

COSLA is the independent organization of the chief officers of state and territorial agencies designated as the state library administrative agency and responsible for statewide library development. COSLA, now in its 40th year, was conceptualized by former State Librarians Al Trezza (IL) and Joe Shubert (OH) in November 1973, in response to the Nixon administration's threat to cut Library Services and Construction Act (LSCA) funding to states. Since then, we have been a major influencer on national library policy.

Mission and Values

At the heart of the organization is our mission to initiate, maintain and support cooperative action for the improvement of library services. COSLA does this by providing leadership on issues of common concern and national interest, and by furthering state library agency relationships with the federal government and national organizations.

COSLA offers our membership mutual support and the opportunity through group action to influence federal policy and national organizations. We promote our leadership role in the library community and with other organizations of state officials in order to affect library policy. We are a dynamic, diverse organization that encourages open discussion of issues.

COSLA members believe:

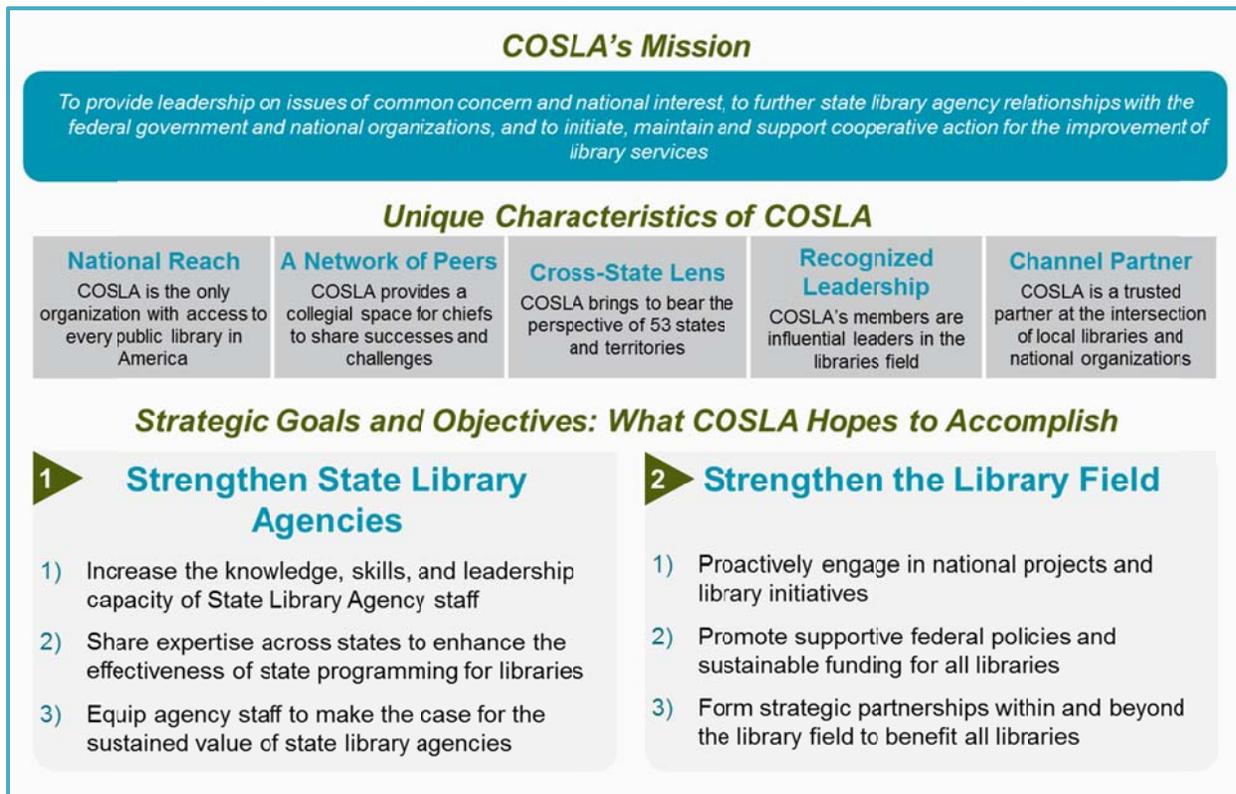
- Everyone has something to contribute and a responsibility to the group.
- Everyone is open and honest with each other.
- COSLA committee and liaison roles require active contributing chairs and members.

- Action must support talk.
- Leadership is responsive to and communicates with membership.

III. COSLA’S STRATEGIC FRAMEWORK AND THEORY OF CHANGE

Our vision of a world in which libraries are better able to deliver services to patrons and the general public and where libraries are valued for the breadth of services they offer is not easy to attain – we need to better equip our state libraries to deliver services to libraries under their purview, and we need federal and state policies that support libraries. The landscape for libraries has shifted dramatically in recent years, and with it, the expectations of the role libraries can and should play in our communities. This shift requires that we, as chief officers of state library agencies, lead the field to find creative ways to leverage libraries as the cornerstone of many communities. The shift also requires us to facilitate greater resource sharing and collaboration among state libraries and with national partners to make the most use of libraries’ limited funding. Our strategic framework, shown in **Figure 1**, will guide our work for the next five years as we step out as a stronger, more proactive player in support of libraries. This framework reflects an analysis of both internal and external factors: our distinctive resources and expertise, internal values and culture, opportunities for impact, and the plans and priorities of our partner organizations.

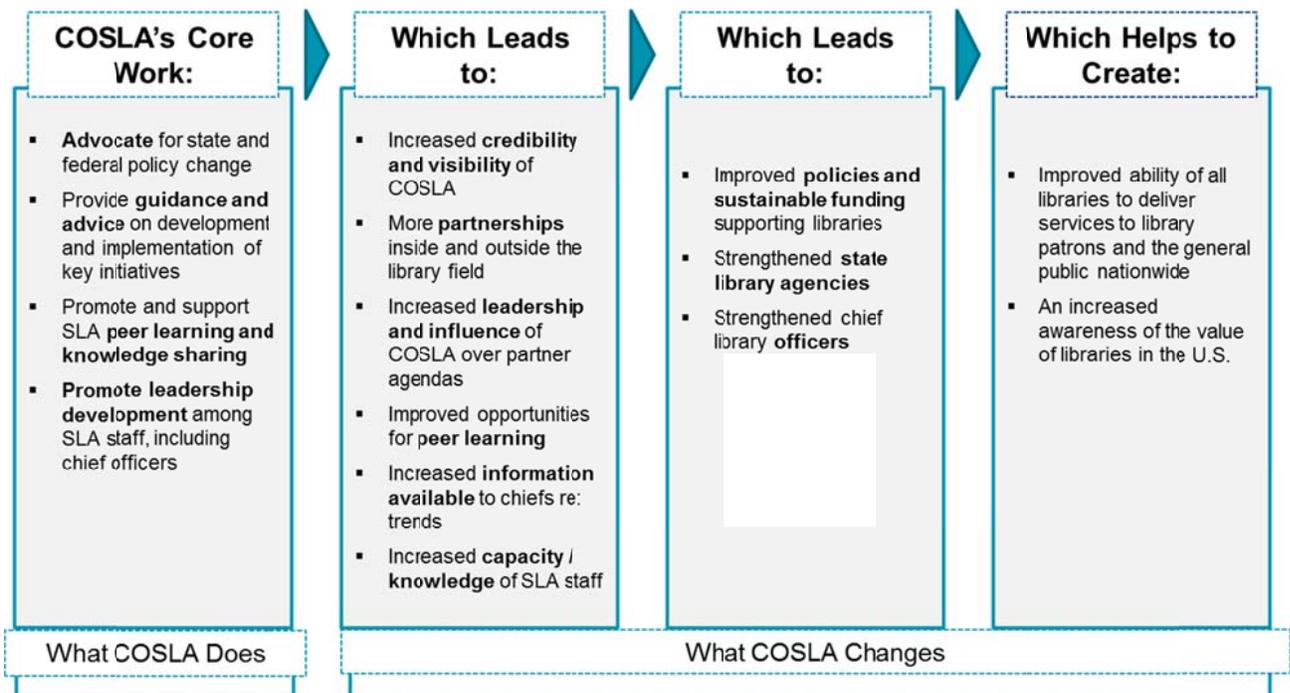
Figure 1: COSLA Strategic Framework



Our mission: To provide leadership on issues of common concern and national interest, to further state library agency relationships with the federal government and national organizations, and to initiate, maintain, and support cooperative action for the improvement of library services.¹

Our theory of change: If we carry out our core work, we believe a series of changes will happen that will ultimately lead to the improved ability of all libraries to deliver services to library patrons and the general public and an increased awareness of the value of libraries among policymakers and the general public. We believe that several nearer-term changes will help us get there: improved policies and sustainable funding supporting libraries, strengthened chief library officers, and strengthened state library agencies. Given this theory, we have structured our strategic framework to focus on making progress in these key areas of change.

FIGURE 2: COSLA Theory of Change



Our approach: we seek to make progress against our ambitious goals and objectives by:

- **Advocating for state and federal policy change.** Though the advocacy space is crowded, few if any organizations are advocating for state libraries. We seek to shape and influence federal legislation and policy pertaining to libraries, and specifically, state libraries, by proactively engaging in advocacy efforts that might include: testifying before Congress, educating members of Congress, or actively seeking out a seat at the table in policy discussions

¹ The mission was not updated in this organizational planning process.

(e.g., with Department of Health and Human Services, Department of Labor, Citizenship and Immigration Service, Federal Communications Commission).

- **Providing guidance and advice on development and implementation of key initiatives.** We will continue our work advising partners on national library projects and initiatives through COSLA participation on working groups, advisory boards, and committees.
- **Promoting and supporting SLA peer-learning and knowledge sharing.** We intend to build off of the infrastructure and experience of the Public Access Technology Community (PAT-C) and CE Coordinators cohort to create a platform for shared learning across agencies and among peer-groups.
- **Promoting leadership development among SLA staff, including Chief Officers.** We believe local libraries benefit greatly from strong state library agencies, and that strong state library agencies result, in part, because of strong leadership in key SLA positions. Strong leadership teams within SLAs will result in agencies better equipped to advocate for funding, make tough resource allocation decisions, and support their local libraries.

We intend to use our unique positioning to strengthen state library agencies and strengthen the library field. We may choose to focus more on internal than external, or vice versa, depending on opportunities and available resources; however, we believe both are important and mutually reinforcing. Because our work happens in a constantly changing environment, we felt a broad focus gave us a strategic compass while allowing us to remain nimble enough to capitalize on opportunities as they arise – especially related to strengthening the library field. Our specific goals and objectives are detailed in Section V.

IV. COSLA’S UNIQUE POSITIONING IN THE FIELD

Now in our 40th year, COSLA continues to play a unique role in the library field, making important contributions to both library policy and implementation. We are able to span these roles thanks to our membership base of Chief Officers of state library agencies. In their respective states, our members have a sight-line into the intersection of strategy and implementation; as COSLA, we have the ability to aggregate that knowledge across states to offer a more comprehensive and nuanced picture of realities on the ground.

FIGURE 3: COSLA Unique Characteristics



- **National reach.** Because our membership is comprised of the chief officers of state library agencies, COSLA has access to every library in the United States. No other organization has the same reach across communities, which makes us a natural ally in deploying national projects.

- **Network of peers.** We believe that strong Chiefs lead strong state library agencies. A key piece of building the capacity of chief officers is to provide space for sharing successes and challenges with peers. We believe that maintaining a collegial setting for peer-to-peer dialogue is vital to COSLA's mission.
- **Cross-state lens.** Because we have access to all libraries in the United States, we also have a sense of what the field needs, in aggregate. We pool information from across states, and bring that lens to bear in national project and policy discussions. We believe that our knowledge of realities on the ground is critical for anyone operating in a national context.
- **Recognized leadership.** Our members are our key strength; they are politically savvy, well connected, and experienced in their respective states. Together, they are an impressive group of leaders.
- **Channel partner.** We occupy a critical middle layer between federal and state initiatives and local libraries. We offer our partners a mechanism to connect with local libraries and more efficiently launch national programs or initiatives.

V. COSLA'S ORGANIZATIONAL GOALS: TO STRENGTHEN STATE LIBRARY AGENCIES AND STRENGTHEN THE LIBRARY FIELD

As a result of much dialogue and discussion with our members and external partners, we identified two areas of focus that we believe will help us make progress toward our long-term goals of improved ability of libraries to deliver services and an increased awareness of the value of libraries in the United States: strengthening state library agencies and strengthening the library field. Within each broad goal, we identified a set of three objectives to guide our work and resource allocations over the next 3-5 years. In doing so, we recognize that the emphasis among these objectives will rise and fall based on COSLA's organizational capacity, the needs of the field, and the ongoing activities of our partners.

Goal 1: Strengthen State Library Agencies

State library agencies (SLAs) are linchpin organizations, providing leadership for libraries at the state level, promoting and providing continuing education opportunities for local library staff, disbursing federal or grant funds, overseeing national projects, and otherwise working to improve service delivery in their respective states. In recent years, many state library agency budgets, like library budgets in general, have been cut, forcing our agencies to do more with less. As the association of chief officers, we believe it is vitally important for agencies to be supported, and recognize that outside of COSLA, no organization is doing this in a focused way. We intend to take a greater focus on building the capacity of SLAs, by focusing on increasing agency staff's knowledge, skills, and leadership capacity; creating venues and programming for agency staff to share expertise across states; and by equipping agency staff to make the case for the sustained value of state library agencies.

Objective 1.1: Increase the knowledge, skills, and leadership capacity of state library agency staff

Agency staff, especially chief officers, library development directors, and continuing education coordinators, work in a complex, dynamic field. Not only must they have a deep knowledge of library science and their communities, they must also have political savvy and strong leadership skills. On-the-job training certainly occurs, but we recognize that a more intentional focus on building the knowledge, skills, and leadership capacity of SLA staff is required, especially given the imminent retirement of several chief officers in the coming years.

To do this, we will use three core strategies: 1) align, streamline, and expand access to professional development and continuing education for key SLA staff positions; 2) promote leadership development; and 3) provide guidance to states on hiring and onboarding new Chiefs. This might mean that we:

- Maintain and strengthen peer networks (e.g., for Chiefs, CE Coordinators, Library Development Directors, PAT-C),
- Develop a mentoring program to connect SLA staff in similar situations – in particular, for succession planning or onboarding new Chiefs,
- Partner with outside groups to provide professional development, leadership, continuing education training or workshops (e.g., Leadership Institute),
- Conduct a continuing education needs assessment survey by SLA role,
- Define core competencies for particular roles,
- Develop candidate profile for Chief Officer position, and/or
- Develop onboarding materials for new Chiefs.

Objective 1.2: Share expertise across states to enhance the effectiveness of state programming for libraries

Like many publicly funded institutions, SLAs are increasingly asked to provide more services with fewer resources. This makes it ever more crucial to share the great work and promising practices underway at individual libraries or SLAs. In doing so, SLAs can avoid “recreating the wheel” in terms of program planning or partner with libraries offering similar programming to stretch their program budgets.

To meet this objective, we will use two core strategies: 1) promote and share knowledge, promising practices, tools, and resources, and 2) facilitate and enable cross-state collaboration. We will do this by:

- Compiling or harnessing information on best practices from Chiefs or other SLA staff,
- Developing or securing an enhanced platform from our current Ning to facilitate sharing,

Goal 1: Strengthen State Library Agencies

1.1 Increase the knowledge, skills, and leadership capacity of state library agency staff

1.2: Share expertise across states to enhance the effectiveness of state programming for libraries

1.3: Equip agency staff to make the case for the sustained value of state library agencies

Goal 2: Strengthen the Library Field

2.1: Proactively engage in national projects and library initiatives

2.2: Promote supportive federal policies and sustainable funding for all libraries

2.3: Form strategic partnerships within and beyond the library field to benefit all libraries

- Proactively identifying and understanding key issues/trends in the field to educate and strengthen SLAs programming (e.g., Affordable Care Act, Early Learning), and
- Bringing collaborators together to identify ways of working and sharing knowledge and resources.

Objective 1.3: Equip agency staff to make the case for the sustained value of state library agencies

Though many of our partners lobby at the state and federal level for funding for libraries, very few, if any, lobby for funding specifically for state library agencies. Thus, Chiefs are called upon to advocate for maintaining or increasing SLA funding but often do not have the time or resources to compile information on the value of state library agencies. As the association of chief officers, it makes sense for COSLA to take on that task.

To do this, we will 1) provide access to advocacy training for Chiefs (e.g., training sessions at the annual meeting), and 2) develop materials for Chiefs and SLA staff to use when making the case for state library agency funding.

Goal 2: Strengthen the Library Field

In recent years, the library landscape has shifted dramatically in the United States. The traditional conception of libraries as a brick and mortar building housing books is gone – libraries in the 21st century offer much, much more to patrons and the public. It is important that key players, including COSLA, provide leadership in the space, and promote this message with partners inside and outside the library field. To do this, we will proactively engage in national projects and library initiatives, promote supportive federal policies, and form strategic partnerships within and beyond the library field.

Objective 2.1: Proactively engage in national projects and library initiatives

Many partners in the library field are engaged in important field-building work. Because of our unique cross-state lens and connection to libraries, it is imperative that we bring this voice to the table in national project discussions, to enhance the effectiveness and sustainability of national initiatives.

To do this, we will 1) provide guidance and advice to partners, and 2) have representation on advisory boards, working groups, and/or committees. Specific activities may include:

- Developing prioritization criteria to guide decisions about what issues or policies to push for or respond to (e.g., a “Top 10” issue list),
- Developing talking points on topics central to state library agencies,
- Identifying and meeting with partner organizations inside and outside the library field, and
- Participating in field-wide meetings, forums, and/or convenings.

Objective 2.2: Promote supportive federal policies and sustainable funding for all libraries

COSLA was formed in response to a threat of cuts to federal library funding to states. Since its inception, advocating for supportive federal policies and sustained funding has, and will continue to be, paramount

for COSLA. We will continue to advocate for traditional sources of federal funds, from the Institute for Museum and Library Services (IMLS) and through the Library Services and Technology Act (LSTA) while expanding our advocacy efforts to additional agencies that might want to leverage libraries' position in communities for their own programming goals.

We will employ advocacy and government relations strategies to make progress against this objective. Specifically, we intend to:

- Meet with influencers and policy makers,
- Determine how to work with and coordinate with partner groups,
- Bolster our D.C. presence through networking and meeting with legislators and administration officials, and
- Collect data and stories about the value of libraries, with a focus on state libraries.

Objective 2.3: Form strategic partnerships within and beyond the library field to benefit all libraries

We have ambitious goals and recognize that we cannot do it alone. We believe, as the saying goes, that if we want to go far, we need to go together. We will build from our existing, strong relationships with partners in the library field. We will also seek out additional partnerships with organizations beyond the library field – strategically choosing those we believe can help us achieve our ambitious goals.

To do so, partner engagement and a public relations or communications strategy will be needed. We will identify non-library organizations that might be promising partners for local libraries and create actionable partnerships that leverage the current and potential value libraries have in communities.

VI. EXPANDING OUR ORGANIZATIONAL CAPACITY

We have established an ambitious set of priorities for 2014-2018. These priorities and potential activities will enable COSLA to make a much greater impact on state library agencies and the library field, and provide better service to members. But delivering on these expanded priorities will take a level of capacity that COSLA currently does not possess. While members will continue to play critical roles, we anticipate that COSLA will need the following functional capacities:

- Public representation
- Advocacy
- Project management
- Partner development
- Grant seeking / management
- Community facilitation / management
- Analysis and trend-tracking
- Communication / marketing

Over the next five years, these capacities could be supplied through a combination of member contributed time, contractor support, and/or staff positions. In 2014, we are “making the leap” to seek executive director services. We came to this important inflection point for COSLA based on an examination of our current activities and aspirations for the next five years. We intend to continue utilizing contract staff to fully deliver on our existing grant work.

Executive Director Services

Securing executive director services will allow COSLA to undertake a greater array of services for members and state library agencies. At the same time, an Executive Director will make COSLA and its members a much more visible, effective presence externally. An Executive Director will provide representation for COSLA at key national convenings and in front of decision makers. COSLA will also become a much more influential advisor to policymakers and national partners on issues critical to the future of libraries nationwide. Finally, an Executive Director will lead fund development for COSLA’s expanded set of activities. We envision that an Executive Director would be a strong leader for COSLA as an organization, but would first and foremost be a representative of and for COSLA’s members. Key Executive Director services include:

- *Fund Development* – Create and implement a fundraising plan, including identification of corporate sponsors and potential sources of grant funding
- *Stakeholder / Partner Management* – Represent COSLA at working groups, on advisory boards, in discussions with policy makers; build and strengthen relationships with new and existing partners
- *Program / Operational Management* – Oversee grant programs, association management staff, budget, etc.
- *Board Management* – Keep Board apprised of activities and progress
- *Leadership* – Ensure continual progress against COSLA’s strategic framework

We also anticipate that an Executive Director will manage grant contractors in the near term. In the longer term, the Executive Director will explore the possibility of additional staff, given COSLA’s needs and available resources.

CONCLUSION

We are pleased with the new direction detailed in COSLA’s organizational plan. In crafting our new strategic framework, we strived to preserve what members most valued about COSLA – the camaraderie, the forum for connecting with peers, and the formal and informal networking with national partners – while also developing new capacities that will enable COSLA to better serve members and the library field, facilitate resource sharing, and catalyze collaboration. Our strategic framework entails a significant inflection point for COSLA as an organization and will allow us to live up to our mission more fully. We are poised to step into the next decade as a stronger, more proactive organization as we work to strengthen state library agencies and the library field. In doing so, we are confident we will make progress against our ambitious goals: that libraries are better able to deliver services to patrons and the general public and that libraries are valued for the breadth of services they offer.