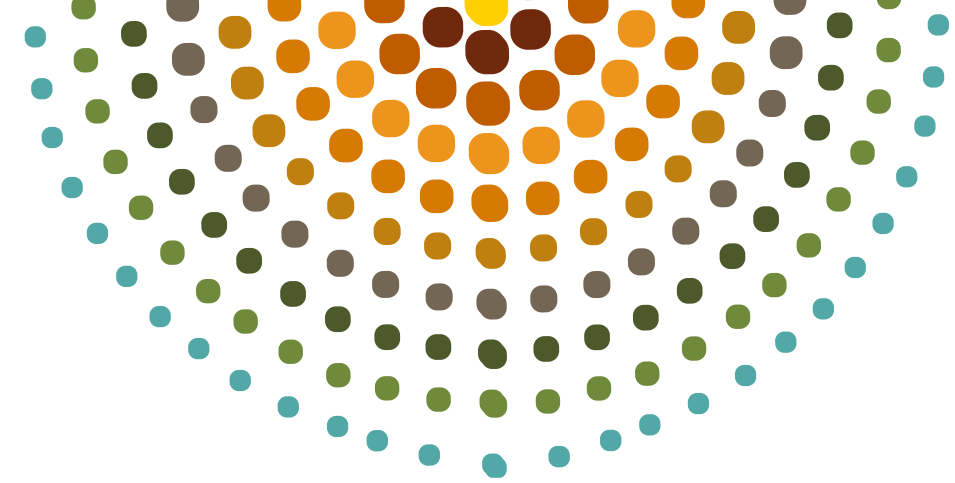


**C**  **SLA**  
CHIEF OFFICERS OF STATE LIBRARY AGENCIES

Advancing library services nationwide



# COSLA

STATE LIBRARY AGENCIES  
UNITED  
TO ADVANCE  
LIBRARY SERVICES  
NATIONWIDE

## Executive Summary

In 2018 COSLA set out to develop a new organizational plan to guide the Board, staff, and membership in fulfilling its mission with efficiency and impact. This effort builds upon the work started five years ago that is described in the 2014 - 2018 organizational plan. To begin this board-led participatory process that ran from May through October and included a combination of in-person member conversations, workshops, and independent online sessions with the board, Members reaffirmed the overarching goals and objectives set out in the previous plan.

The 2019 - 2021 organizational plan presented herein takes into consideration the challenges of the shifting professional landscape, the ever changing nature of COSLA as it routinely welcomes new members and internally gains capacity, as well as acknowledges opportunities to be leveraged and programs to be sustained. The plan is comprised of three primary components: 1. A practical vision for what success looks like, sounds like and feels like three years from now 2. A set of nine focus areas comprised of intentional actions, and 3. A series of measurable accomplishments phased across a three-year timetable. This plan provides a framework in support of all that COSLA does as it continues building on what was started over five years ago to strengthen state library agencies and more broadly, the library field.

In the near term, COSLA's highest priority is to strengthen itself organizationally developing additional capacity in order to engage, invite, initiate, and leverage its influence to impact key national issues and proactively build strategic partnerships. Through programs such as Measures that Matters that seeks to demonstrate the value and impact of libraries through coordinated collection and analysis of meaningful data, to its national policy and legislative advocacy efforts to increase Library Services and Technology Act (LSTA) funding, and a strong commitment to training and mentoring the next generation of state library leaders, this member-driven, independent organization of chief officers of state and territorial agencies united to advance library services nationwide, is poised to channel its strengths into an increasingly formidable and highly recognized national library organization.

In addition, this plan and the process used to create it, illustrate COSLA's values and the principles that underpin its collective efforts across the country. The process was open and inclusive, thoughtful and focused, encouraged group and individual creativity, learning and reflection. It provided opportunities for all voices to be heard. It was created with respect, kindness, and grace. And, it reflects the unity of all who contributed to it.

## Introduction

The planning process began with a set of focused conversations with Members that sought to recognize recent accomplishments and successes, inquire about the challenges and issues facing them as Chiefs, identify opportunities that COSLA can build on as well as the key trends that are having an impact on COSLA's mission. We heard Members say that they find the COSLA to be better organized, financed, and able to articulate library needs; that it is a stronger professional advocate, has greater visibility at the national level, and that it is viewed by peers, colleagues, and sponsors with increased credibility as a partner. Some of the challenges that Member's identified they were facing as Chiefs included the ongoing questioning of the value of libraries at all levels, succession planning and how best to prepare for it, increasing diversity across the field, funding fluctuations as a result of the political climate, and the narrowing of the library field with regard to educating and training the next generation of librarians.

Members indicated that there were opportunities herein for COSLA to help them address these issues through leadership development, helping Chiefs to be more deliberate in putting it out there that libraries are a place to work and that there is a career path within libraries; building bridges to higher education and potential academic partners; and through message development to cultivate new partners and nurture existing relationships with sponsors and funders.

Some of the trends that Members identified as having an impact on COSLA's mission include: the ramping up of partnerships amongst peers, public and private, with regard to emergency preparedness and response, and as a way to share resources and activate purchasing power; the increasing impetus to make everything accessible as a result of moving to digital for everything that libraries do; conflicting messages in recognition of libraries as core to community resilience and at the same time the privatization and outsourcing of jobs that were once part of the library; the diminution of small, state academic and school libraries; and an urgent need for authoritative information and voices in libraries to effectively communicate their value in an increasingly splintered society.

## Visioning

Using the data collected from the focused conversations we designed a visioning exercise for Members during which we asked them to share their thoughts on what success would look like, what members would be saying, and how members would be feeling three years from now at the point their new organization plan would be successfully implemented.

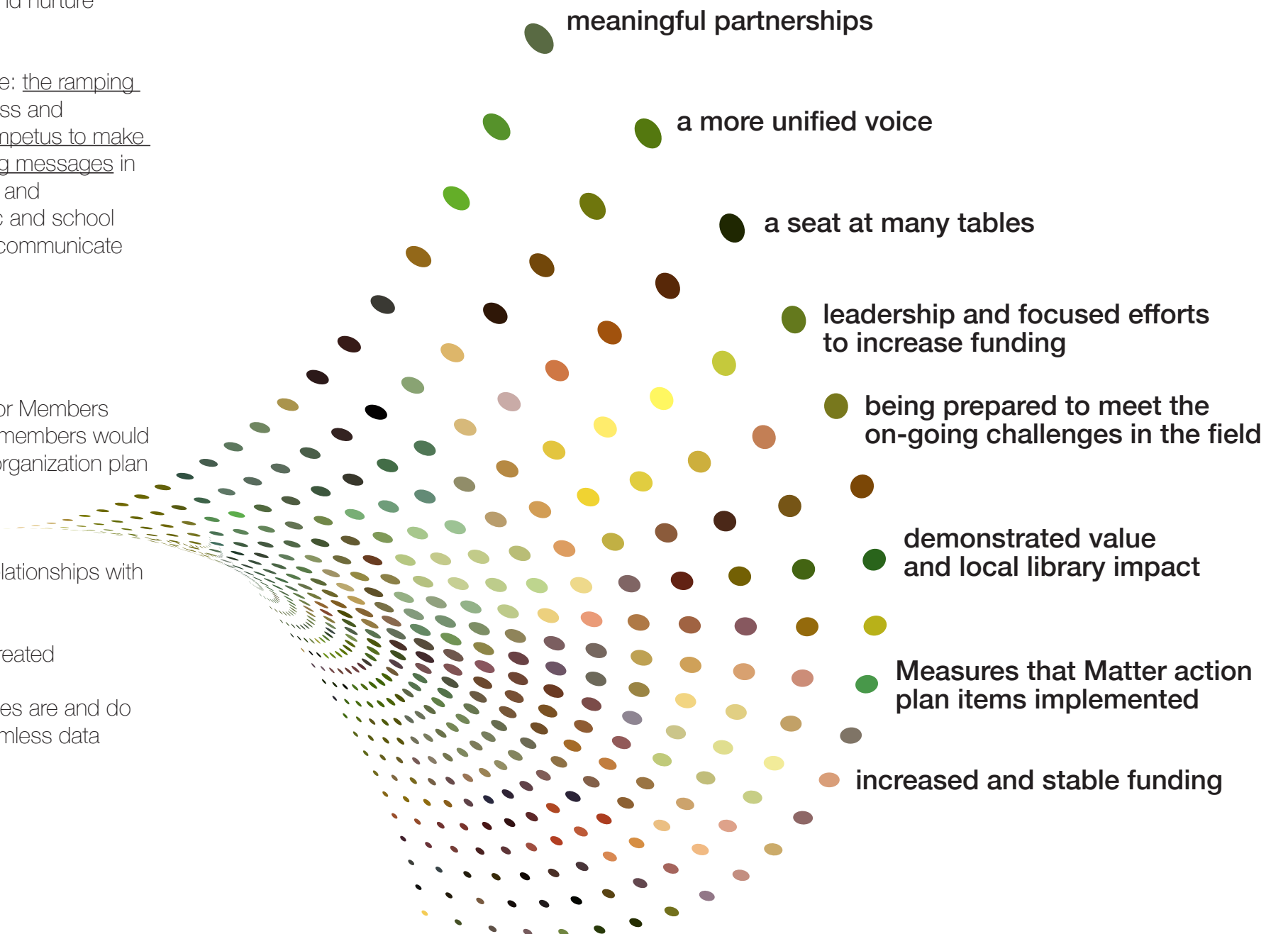
Members described success as looking, sounding, and feeling like:

- **meaningful partnerships** amongst members and stronger, more effective relationships with external partners, sponsors, and peers established
- **a more unified voice** (advocacy) and **a seat at many tables** (influence)
- **leadership and focused efforts to increase funding**, new opportunities created and **being prepared to meet the on-going challenges in the field**
- shared success stories and better communication [outward] about what libraries are and do
- **demonstrated value and local library impact** through systematic and seamless data collection and shared solutions
- the top **Measures that Matter action plan items implemented**
- **increased and stable funding** for COSLA

Keywords associated with COSLA's practical vision include:

strong	coalition	advocacy	unified
value	equitable	proud	diverse
rewarding	influential	supportive	collegial

The results of this effort can be found in the Appendix. This practical and aspirational picture of success served as the starting point for the subsequent workshop that focused on identifying what would need to be accomplished in order to realize this shared vision.



## Focus Areas

Through a series of individual, small, and large group exercises, members created lists of activities, discussed what they wanted to accomplish, and developed a set of Focus Areas that would serve to ground their collective effort moving forward. The following nine areas were identified:

### 1. Strengthening and increasing organizational development and capacity

This Focus Area is about continuing to strengthen COSLA internally, in ways that support current staff, expands COSLA's options with regard to what it is able to take on, and enables COSLA to continue to integrate infrastructure tools in support of project management and communications requirements. Measurable accomplishments for this arena include hiring a half-time staff person; increasing revenues; and maximizing meaningful Member engagement as a component of organizational capacity.

### 2. Engaging, inviting, initiating: Leveraging COSLA's influence to impact key national issues

This Focus Area is about leveraging COSLA's influence at the national level. Measurable accomplishments for this area include creating a process for determining how and when COSLA would engage in a national issue so that it could participate in a cohesive and organized way; testing the process within the context of issues that are of most concern to Members such as finding ways to support school libraries, establishing new business models with e-book publishers, sharing a voice in library education and leadership, participating in cooperative diversity planning efforts, and other issues wherein COSLA could leverage its influence for greater impact.

### 3. Proactively building strategic partnerships

This Focus Area is about relationship building that is informed by COSLA's needs and results in COSLA being invited to participate in more discussions, forming new alliances, participating in a greater number of coalitions and nurturing stronger, productive relationships with key organizations. Measurable accomplishments for this area include defining partnership types and a process through which to form partnerships based on degrees of needed formality taking into consideration measures of success, communications, and the effort required to maintain a relationship; formalizing existing and/or core partnerships as necessary; identifying, aligning, and forming new partnerships to make progress on COSLA's legislative agenda and in support of national initiatives of greatest concern to Members; and evaluating partnerships, re-aligning them as necessary, and being good neighbors within and across the broader library and related domains.

### 4. Implementing Measures that Matter

This Focus Area is about implementing the recommendations of the Measures that Matter Action Plan to realize COSLA's vision of streamlined and flexible data collection to enable national benchmarking for library programs and services. Measurable accomplishments for this area include designing and developing a structure to effectively manage the project through its lifespan; establishing a governance board; working collaboratively with PLS/PLDS; obtaining ongoing financial support and sharing recommendations at the 2019 Fall COSLA Member meeting.

### 5. Developing and advancing a national policy and legislative agenda

This Focus Area is about COSLA's ongoing work at the national policy and legislative levels to increase funding and solutions and attract more champions in Congress. Measurable accomplishments for this focus

area include increasing funding and solutions to provide equitable broadband access throughout the nation; cultivating stronger relationships at home with federal representatives; expanding LSTA to allow certain infrastructure improvements for new services; and developing new streams of funding to support digitization efforts by museums and libraries as well as talking points for ongoing legislative initiatives.

### 6. Advocating for the enactment of MLSA re-authorization

This Focus Area is about seeing that the MLSA re-authorization legislation is passed and signed into law. This was identified as one of the areas of greatest interest to Members. Measurable accomplishments for this area include checking in on progress and visualizing success; increasing advocacy efforts; starting a campaign and conversations with representatives - being actively involved in making this happen; and, if necessary, reviewing and re-introducing MLSA.

### 7. Influencing the selection of the next IMLS Director - Having a voice in the choice

This Focus Area is about being aligned with IMLS, being able to express a COSLA choice for the next Director, and engaging in this conversation in a vibrant, informed, and cooperative way. Measurable accomplishments for this area include developing an evaluation matrix based on member feedback; collecting possible candidate names; communicating back to members about the review of names; running names through the matrix to produce an objective review; identifying and having conversations with possible candidates, ALA and others as appropriate.

### 8. Increasing significantly LSTA funding to states

This Focus Area is about increasing Federal funding to libraries across the country. Measurable accomplishments associated with this area include collecting and presenting data and research that supports "the ask"; visibly working in partnership with organizations that are willing to help; and developing a campaign that tells Member stories as a means through which to change the messaging and share experiences.

### 9. Building professional capacity - leadership and skills development

This Focus Area is about COSLA's role in the broader library community; how it wants to participate and where it wants to take a leadership role in building a stronger platform for sharing best practices, strengthening relationships among SLA staff, building upon opportunities for linkages at all staffing levels (i.e., beyond Chiefs), intentionally spending time considering future trends and their impact on COSLA, and more. Measurable accomplishments for this area include creating a periodic and sustainable national conference for State Libraries; designing and building a stronger platform for sharing via virtual events on topics of interest and concern; and creating and implementing an "Institute" to develop State Library leaders. The full complement of Focus Areas and the accomplishments that Member's identified for each can be found in the Appendix.

# OUR 2019 PRIORITIES

## Implementing Measures that Matter

Developing and advancing a national policy and legislative agenda

- Advocating for the enactment of MLSA re-authorization
- Influencing the selection of the next IMLS Director. Having a voice in the choice.
- Increasing — significantly LSTA funding to states

Building professional capacity leadership and skills development

Engaging, inviting, initiating:  
Leveraging COSLA's influence to impact key national issues

Proactively building strategic partnerships

Strengthening and increasing organizational development and capacity

## Priorities

The next step in the planning process was to create a workflow that would provide a structure and sequence for the sixty or more possible accomplishments identified for the nine Focus Areas noted above. Working in groups organized around Focus Area, Members' discussed and filled out an implementation matrix that asked them to consider the intent of the Focus Area, drill deeper and articulate specific actions that would need to happen and that when accomplished would indicate progress was being made towards achieving success for a given area, to propose a completion date for each action as well as suggest who might be involved and what resources would be needed in support of completing each action item.

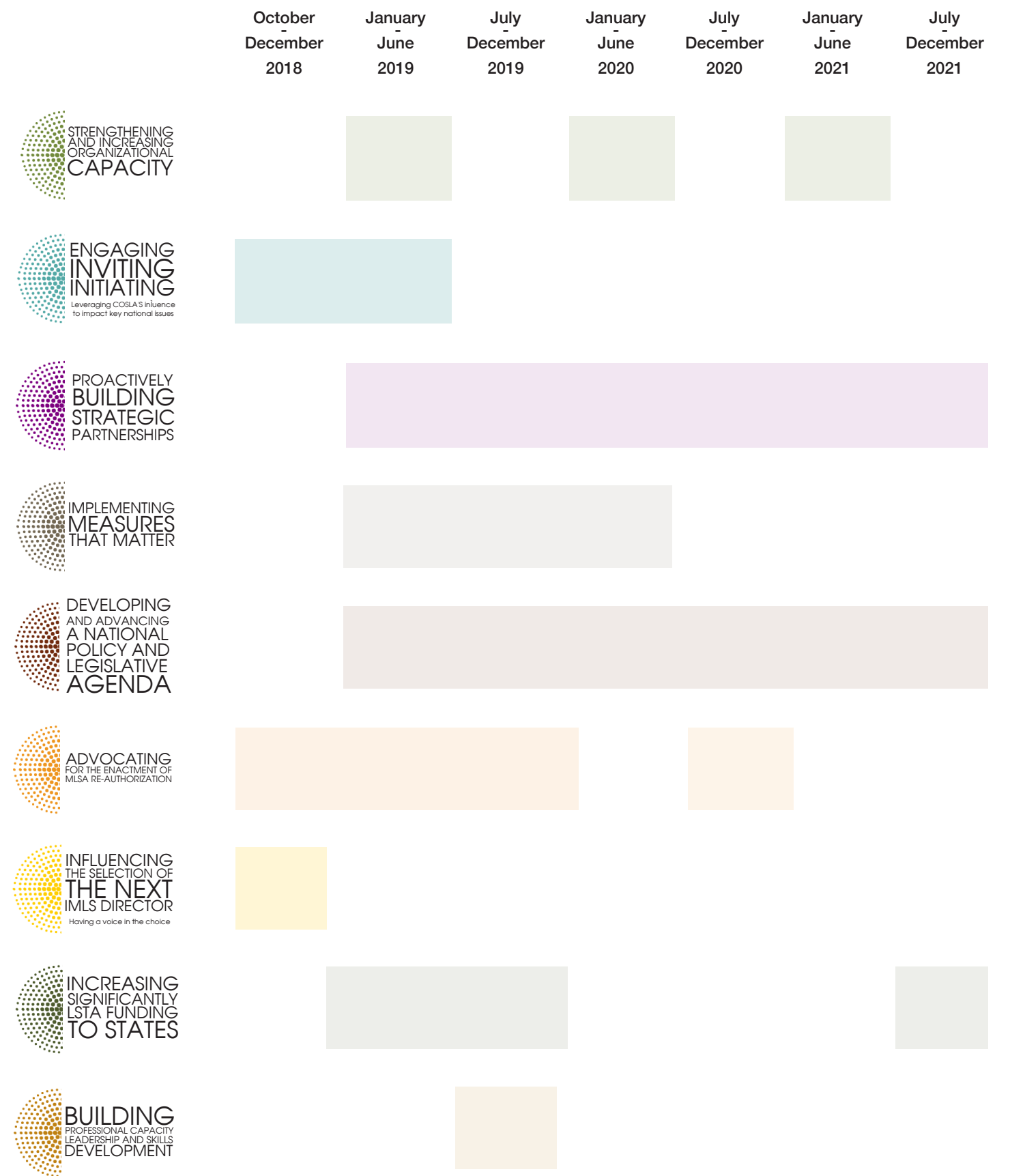
After seeing the full set of actions and intents, we asked Members' to prioritize them. The full three-year set of priorities can be found in the Appendix. As presented here, the board took the set of nine priorities and streamlined them into a twelve-month set for the start of the implementation process leading with the most catalytic action that would serve to build momentum for the others that follow. It is envisioned that COSLA will update their priorities on a six-month basis as part of their project management practice moving forward. This will keep the plan alive and provide an opportunity for flexibility in meeting Member needs over time.

## Phases of Work

The final step in the planning process involved creating an action calendar for coming three-years plan period. The calendar provides a visualization of the plan of work described in six-month segments by Focus Area. As the calendar illustrated, Members' were keen to finish 2018 with an emphasis in three areas: the first being to continue their efforts to cultivate stronger relationships in Congress as part of their strategy to advocate for the enactment of MLSA re-authorization; the second centering around creating a process for determining if, how, and when to engage in national issues; and the third focusing efforts on how to express COSLA's voice in the choice of the selection of the next IMLS Director in a timely fashion.

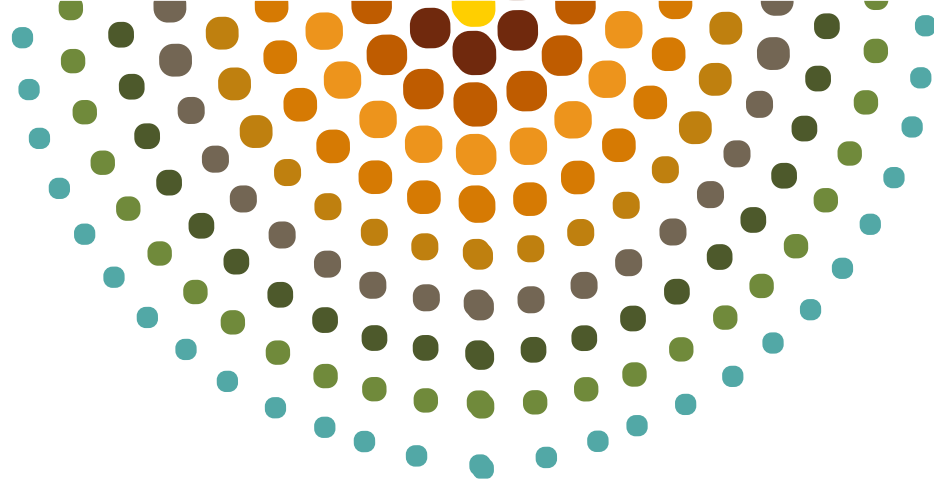
With those efforts well under way or completed as in the cases of the hiring of a half-time staff member, expressing COSLA's voice in the choice of the selection of the next IMLS Director, and the MLSA re-authorization which was successfully signed into law on December 31, 2018, Members' will be turning their attention, in the first half of 2019, to actions oriented towards beginning to implement the engagement process around national issues alongside initial efforts to define strategic partnerships aligned with legislative agenda items; determining the structure to effectively manage Measures that Matter moving forward; putting energy into conversations around how to expand LSTA to allow certain infrastructure improvements for new services, and exploring possible partnerships with allied organizations in support of increased LSTA funding to states.

As it embarks on the implementation of this ambitious and bold organization plan, COSLA is well equipped to strengthen itself organizationally to provide capacity in order to address key national initiatives; building on what was started five years ago to strengthen state library agencies and more broadly the library field.





APPENDIX



# SUCCESS

## LOOKS LIKE

Data solutions are systematic and seamless to showcase library value & demonstrate cause and effect

Meaningful partnerships between members

Increased broadband funds

Organizations ask to partner with COSLA

Increased G2S funding

COSLA invited to many tables!

Measures that Matter has been successful in changing how we measure

LSTA reauthorized

Stronger federal funding due to COSLA advocacy efforts

We have a data system that articulates the value of libraries

Rural broadband connectivity equity thanks to libraries

Partnerships established and functioning

Top MTM action items have been implemented

Sharing stories of our successes because we are well funded and influential

COSLAs influence is substantially stronger and more widespread!

New IMLS leadership has led to unified advocacy for both libraries and museum communities

COSLA leads a strong, diverse coalition of members from within & outside the library community that gets all this done, creates new opportunities & is ready for the next challenge

New IMLS director is strengthening the agency and improving relationships

Strong relations with new IMLS leader & new president & new congress

IMLS director has been attending COSLA meetings – strong relationship

ALA, IMLS, COSLA, LIS schools have a common diversity plan with holistic approach

Increased and stable IMLS funding

Real progress toward \$1/capita

\$1/capita \$350M need help from vendors

More financial support through IMLS

Finding new connections with integrated data (library & external) building our future

Advocating for \$1/capita for G2S still in process

More/strengthened national resource sharing

Collaborative purchases – shared resources

Legislative agenda set in coordination with ALA

More equity in ebook world – more favorable to libraries – more players

Effective partnerships in WF development field & high visibility for library role

## SOUNDS LIKE

Library leadership is strong

Thanks for scholarships to broaden diversity

We do a better job communicating what libraries are & do

\$1/capita is a reality!

Hello, my name is...turnover continues

None of us can imagine a COSLA without the stability that Tim and AMR provide

We can easily & efficiently “see” what state by state is being accomplished. The who, what, when, where, why & how is obvious and because of this we (COSLA) has momentum!

LSTA @ \$1/capita! Yeah! We did it!

We should have partnered with libraries long ago

## FEELS LIKE

Collegial

Invigorating

Creative

Strong voice in national conversations about librarianship

Supportive

State libraries across the nation are strong and vibrant

Strong – Good

State libraries with help from COSLA have positive impacts on local libraries

Proud




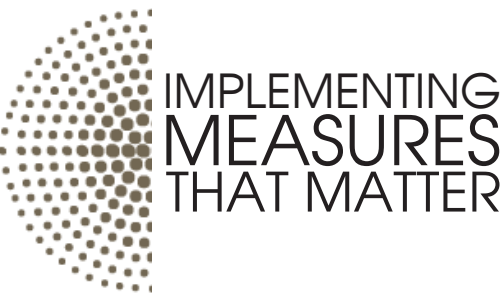
Rewarding

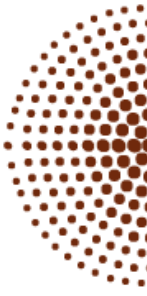

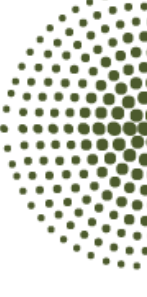


Relief!

Great!



Engaging, inviting, initiating: Leveraging COSLA's influence to impact key national issues	Developing and advancing a national policy and legislative agenda	Proactively building strategic partnerships	Advocating for the enactment of MLSA re-authorization	Significantly increasing LSTA funding to states	Influencing the selection of the next IMLS Director Having a voice in the choice	Implementing Measures that Matter	Strengthening and increasing organizational development and capacity	Building professional capacity – leadership and skills development	
Cooperative diversity plan (ALA, COSLA, IMLS, MLIS schools)	Many more champions in Congress	Relationship building outside the 4 walls of library land	Re-authorization of MLSA	LSTA re-authorization with \$1/capita	IMLS leader representative of Cultural Heritage Communities	Better understand library outcomes not just outputs	Expanded resources for COSLA	A national conference for state libraries – best practices, stronger platform for sharing	
Voice in library education and leadership	Set a legislative agenda	Strong/productive relationships with key organizations	LSTA re-authorization	Grants to states exceeds \$1/capita	COSLA influences choice of new IMLS leader	Data governance adopted and understood	COSLA has a second full time staff	Robust opportunities for COSLA member participation COSLA Academy	
Library-friendly e-book market	IMLS allows construction dollars	Formal partnerships with NACO & ICMA		\$1 per capita for grants to states and increase the base	COSLA endorsed IMLS Director	Implement recommendations of Measures that Matter Action Plan	Financially strong COSLA	COSLA leadership development institute Other State Library linkages (beyond Chiefs)	
Establish new business model with e-book publishers	Increase funding and solutions to advance broadband	Coalition of diverse stakeholders Private, Public, Non Profit, Alliance!		Increase federal funding + 20%	Vibrant, library-focused director of IMLS that works for us	MTM demonstrates LIBRARY VALUE!	COSLA has more revenue streams	• CE • Library Development • Youth • Emerging Technology	
Find ways to support school libraries		COSLA invited @ many tables		LSTA @ \$1/capita or more	An IMLS director who geeks libraries	Streamlined, flexible data collection	Efficiency in communicating between ourselves – who, what, when, where, why, how	Leadership training for state libraries and staff to be effective State Library Agencies	
School library initiative led by COSLA		Drive expectations that the linkages between stakeholders are meaningful in as much as they connect to advancing learning & training to create marketable skills		\$1/capita	IMLS aligned with COSLA	National benchmarks for programs and services	New communication platform for COSLA	Increased relationship building among SLA staff	
Increased buying power thru sharing				Increased minimum allotment toward \$1/capita				Heed warning in OCLC report From Awareness to Support: Support is dropping	½ time of membership meetings focus on external trends – future forward
Set new strategic initiative • e-book • VR • Workforce • Rural broadband				Significantly increased grants to states funding					CE for SLA staff
								\$1/capita	Fostering strong leadership in our State Library Agencies
				Federal \$ doubled					

	October - December 2018	January - June 2019	July - December 2019	January - June 2020	July - December 2020	January - June 2021	July - December 2021
 <p><b>STRENGTHENING AND INCREASING ORGANIZATIONAL CAPACITY</b></p>		Hire half-time staff member		Maximize meaningful member engagement as a component of organizational capacity		Increase revenues by X%  Hire full-time staff member	
 <p><b>ENGAGING INVITING INITIATING</b> Leveraging COSLA'S influence to impact key national issues</p>	Process created for determining if, how, when COSLA engages in national issues [December 31, 2018]	Process for engagement in national issues is used for selected topics [June 30, 2019]					
 <p><b>PROACTIVELY BUILDING STRATEGIC PARTNERSHIPS</b></p>		Define partnership types and process to form partnerships [April 2019]  Identify, align, and form partnerships to move legislative agenda and national initiatives [April 2019]	Formalize existing and/or core partnerships [October 2019]	Evaluate partnerships realign as necessary. Be good neighbors [on-going]	Evaluate partnerships realign as necessary. Be good neighbors [on-going]	Evaluate partnerships realign as necessary. Be good neighbors [on-going]	Evaluate partnerships realign as necessary. Be good neighbors [on-going]
 <p><b>IMPLEMENTING MEASURES THAT MATTER</b></p>		Determine structure to effectively manage project through its lifespan [January 2019]  Obtain ongoing financial support [April 2019]  Establish data governance board [April 2019]	Recommendations shared at Fall 2019 COSLA Member meeting [October 2019]	PLS/PLDS work collaboratively [January 2020]  Obtain on-going financial support [April 2020]			

	October - December 2018	January - June 2019	July - December 2019	January - June 2020	July - December 2020	January - June 2021	July - December 2021
 <p><b>DEVELOPING AND ADVANCING A NATIONAL POLICY AND LEGISLATIVE AGENDA</b></p>		<p>Expand LSTA to allow certain infrastructure improvements for new services (*This will not be completed within 3 years, but work has to begin within this 3 years.) [Starts January 2019]</p>	<p>Cultivate stronger relationships at home with federal representatives (develop champions in Congress) [annually]</p>	<p>Develop consistent talking points for legislative initiatives [on-going]</p>	<p>Cultivate stronger relationships at home with federal representatives (develop champions in Congress) [annually]</p> <p>Develop new streams of funding to support digitization efforts by museums and libraries [December 2020]</p>	<p>Develop consistent talking points for legislative initiatives [on-going]</p>	<p>Cultivate stronger relationships at home with federal representatives (develop champions in Congress) [annually]</p> <p>Increase funding &amp; solutions to provide equitable broadband access throughout the nation (speed &amp; capacity) [December 2021]</p>
 <p><b>ADVOCATING FOR THE ENACTMENT OF MLSA RE-AUTHORIZATION</b></p>	<p>Cultivate stronger relationships at home with federal representatives (develop champions in Congress) [annually]</p> <p>Increase funding &amp; solutions to provide equitable broadband access throughout the nation (speed &amp; capacity) [December 2021]</p>	<p>Start campaign + conversations with representatives to get the re-authorization passed</p> <p>Advocacy efforts for MLSA re-authorization</p> <p>Review and re-introduce MLSA (if necessary)</p>					
 <p><b>INCREASING SIGNIFICANTLY LSTA FUNDING TO STATES</b></p>		<p>Partnerships with organizations (in support of a funding increase) [January 2019]</p>	<p>Data research and support (for increased funding) [July 2019]</p> <p>Develop campaign telling our stories [July 2019]</p>				<p>Increase in library funding [October 2021]</p>
 <p><b>INFLUENCING THE SELECTION OF THE NEXT IMLS DIRECTOR</b></p> <p>Having a voice in the choice</p>	<p>Develop evaluation matrix based on member feedback</p> <p>Collect possible candidate names</p> <p>Communicate back to members about the review of names</p> <p>Run names through the matrix to produce an objective review</p> <p>Have identified possible candidates and had conversations with them</p> <p>Have conversations with ALA and others as appropriate (CCLI?)</p>	<p>Ongoing membership communication and monitoring until completed [December 2019]</p>	<p>Ongoing membership communication and monitoring until completed [December 2019]</p>				
 <p><b>BUILDING PROFESSIONAL CAPACITY LEADERSHIP AND SKILLS DEVELOPMENT</b></p>			<p>Stronger platform for sharing via virtual events on topics that are on-going</p> <p>Create and implement an institute to develop state library leaders</p> <p>Submit planning grant application to IMLS</p>				<p>A periodic &amp; sustainable national conference for state libraries</p>

