Vision, Mission and Strategic Goals Update

RLIF Celebration
June 8, 2022
Overall Project and Timeline

**2021**
- Project Start Complete
  - November: Board approval Value Proposition firm hired
  - December: Board launches Vision, Mission, Guiding Principles Task Force
  - Ithaka S+R concludes advancing research and learning interviews

**2022-2023**
- Vision, Mission, Guiding Principles and Action Plan
  - April-July 2022: Member engagement on Vision, Mission, Guiding Principles, Strategic Goals, and Action Plan
  - July 2022: Board approves Vision, Mission, Guiding Principles, and Strategic Goals
  - October 2022: Board approves Action Plan for 2023-2024 and budget
  - January 2023: ARL launches Action Plan
- Membership
  - May-October 2022: Member engagement on Member Experience Review and Plan
  - October 2022: Member engagement on Membership Model and Financial Framework
  - February 2023: Board approves Member Experience Plan, Membership Model and Financial Framework

**2023-2024**
- Policy Development
  - Board works on Bylaws
  - April 2023: Member discussion and vote on any Bylaws changes
  - Board works on related policies (potentially through 2024)
Ithaka S+R Report
• The pursuit of growth, particularly in the STEM research enterprise
• At public higher ed institutions, efforts to engage the state, both through its political system and its population
• Redressing relationships with the historically marginalized, with significant variation between Canadian and US higher education institutions
• Defending the residential experience

Value Proposition Survey: Top reasons for ARL engagement are to:
• Expand my knowledge of trends that may impact my work
• **Benchmark my library/archives performance among peer institutions (55%)**
• Help my library/archive achieve its specific mission or goals
• Inform key decision-makers in my institution about the state of research libraries/archives
• Give back to the field
• Become a leader/decision-maker
Vision, Mission and Strategic Goals

DEFINING VISION

A vision statement articulates how the world looks when the organization achieves its goals.

A well-crafted one accomplishes the following:

1. It is written in present, not future, tense.
2. It describes the best outcome the organization can achieve.
3. It is inspirational and powerful.
4. It presents an achievable and desirable future state.
5. It is used to communicate the change the organization wants to bring about to internal and external audiences.

Please note: "vision" is a hotly debated topic and there is no 100% accepted definition for it. Here, we are defining "vision" according to the process ARL has adopted. Rather than bogging down in debates about what a vision is, we want to focus our energies on describing what the world looks like when ARL experiences success.
**DEFINING MISSION**

A MISSION STATEMENT explains why an organization exists. A well-crafted one accomplishes the following:

1. It describes the purpose and overall intention of the organization.
2. It references the key problem or goal that an organization seeks to address.
3. It provides broad hints about how the organization might address that problem or reach that goal.
4. It is used to communicate the organization’s core identity to both internal stakeholders and external stakeholders.

Please note: “mission” is a hotly debated topic and there is no 100% accepted definition for it. Here, we are defining “mission” according to the process ARL has adopted. Rather than bogging down in debates about what a mission is, we want to focus our energies on describing the purpose and intention of our organization.

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<th><strong>The Association of Research Libraries is a collective of major research libraries and archives in higher education, government, and public institutions in Canada and the United States that creates, shares, and sustains our global knowledge record by advocating on research libraries behalf, convening with our research and higher education partners, sharing intelligence on critical issues, and developing the next generation of diverse library leaders.</strong></th>
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<td><strong>Collective of Canada/US RLAs</strong></td>
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<td>Creates, Shares, Sustains Global Knowledge Record</td>
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<td>Advocating, Convoking, Sharing, and Developing</td>
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<td>Combined Leadership</td>
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DEFINING STRATEGIC GOALS

STRATEGIC GOALS map the organization’s mission and vision and principles into concrete actions and work plans.

Well-crafted strategic goals:
1. Focus attention on immediate priorities for the organization’s work
2. Describe what you aim to achieve in quantifiable, specific, time-bound terms
3. Include precise assessment criteria

Please note: “Strategic goals” is a hotly debated topic and there is no 100% accepted definition for them. Here, we are defining “strategic goals” according to the process ARL has adopted. Rather than bogging down in debates about what strategic goals are, we want to focus our energies on documenting what we will do and when, and how we’ll assess that it is done.

ARL continues to focus on two core commitments on behalf of its members:

Engender a member experience in which all member representatives feel welcome and can participate in and benefit from the Association

Deepen and expand the understanding of the research library value and brand identity, particularly in terms of its impact in the research enterprise and more broadly
Member Guidance on Vision

- Tighten the statement, shifting from adjective heavy language to powerful verbs
- Focus on what ARL does (vs. what member institutions do)
- Caution using the terms “national, international and global”
- Bring leadership development or the exercise of leadership to the forefront
- Mark the importance of DEIA and sustainability
Member Guidance on Mission

• Focus the mission on what ARL uniquely provides the members
• Move tactical components to goals
• Policy, influence, advocacy and leadership development are hallmarks of ARL’s work and purpose as well as community, learning and partnership
• Avoid describing the composition of the organization
Guidance on Strategic Goals

• Weave DEIA into every goal
• Consider what higher ed leaders say they are seeking
• Define public policy carefully
• Focus on ARL-level goals
• Be careful and specific when use national/international/global
• Be cautious about overextending to OA (many collections are not OA) or towards community-based collections (creators may not what to share their knowledge out of context)
• **Think carefully about what ARL can help institutions measure and benchmark (beyond traditional ARL stats)**
• **Bridge from providing a corpus of data to providing guidance, expertise on analytics and research intelligence**
• Additional topics raise (see the report)
• +feedback on each strategic goal
Next Steps

June
• Guiding Principles
• Focus Groups
• Vision, Mission, Strategic Goals feedback

July
• Draft 2023-2026 Action Plan
• Board review
• Updates as needed by the Task Force, Assoc. Committees, Staff

October
• Board approval