



Ohio Educational Library Media Association

Strategic Plan
May 9 - 10, 2008
Columbus, OH

Foreword

A strategic plan serves as a “roadmap” for an association. It guides the leadership, committees and staff in achieving goals and allocating resources. It informs stakeholders of the direction and long-range plans for the organization.

The following persons participated in the strategic planning retreat, May 9 - 10¹:

Executive Committee

Kathy Halsey	President
Marie Sabol	Vice Pres.
Vicky Schmarr	Past Pres.
Susan Yutzey	Secretary
Cynthia DuChane	Treasurer

Susan Dominique	Northwest 08
Stacy Simonyi	South 09
Anne Schaller	West 08

Directors

Krista Taracuk	Central 09
Liz Deskins	Central 08
Kathleen Cybulski	East 09
Jan Warden	East 08
Dawn Sullivan	Northeast 09
Kristen Roope	Northeast 08

Invited Leaders

Sheila Benedum	Advocacy Chair
Deb Logan	AASL Adv. Comm
Sue Rahn	Past President
Sue Subel	Past Treasurer

Staff

Kate Brunswick, CAE	Dir of Services
Bob Harris, CAE	Facilitator

Brand Platform

The mission, vision and values statements make up the association’s *brand platform*. These statements should provide a compelling, clear message to members, the public, prospective members, and the profession.



¹ Planning session postponed due to snowstorm on March 7-8, 2008.

Mission Statement

The following mission statement was being used to describe the association:

The mission of OELMA is to advocate excellence, facilitate change, promote lifelong learning, and develop leaders in the school library media field.

It was determined that the mission statement should be memorable, clear and easy to articulate, with the following recommendation:

Advocate for school librarians as they educate students for success²

Vision Statement

Because the vision statement was very long, it was replaced with:

The Ohio Educational Library Media Association is Ohio's preeminent professional association for highly effective school librarians and libraries.

Values Statement

A new values statement was developed as a guide for board and staff:

- Commit to educational excellence and academic achievement.
- Serve the needs of 21st Century learners and workers in a global society.
- Respect and promote diverse people and ideas.



² The mission of the Ohio Educational Library Media Association is to advocate for school librarians as they educate students for success

Strategic Direction 2008 – 2011

Goals Strategies & Action Steps

The group identified five goals (association core competencies) for the period of 2008 - 2011. To ensure advancement of the plan, a business or operational plan (template/matrix) should be used to track progress. It was suggested that the vice president serve in the role of Plan

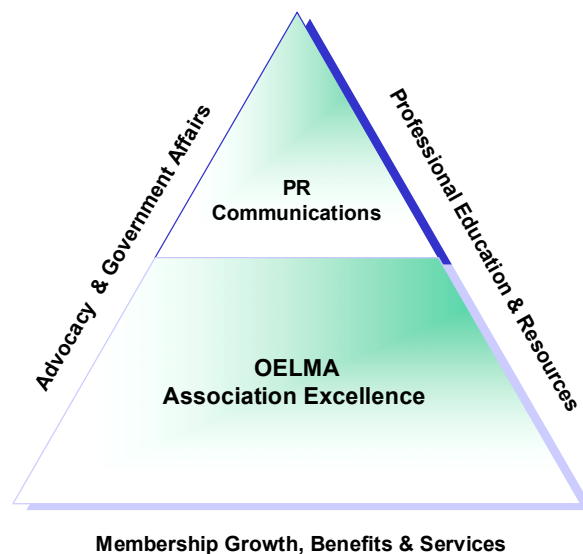
Champion.

In a strategic plan, the work of the committees should align with the goals and strategies. In this case, committees may need to be appointed and committee chairs asked for their input about how they can help advance the goals. Successive presidents will use the strategic plan to develop their program of work and priorities.

The next steps to implement the 2008 plan include:

- 1) Adoption by the board.
- 2) Alignment with committees and committee assignments.
- 3) Development of an operations or business plan by staff.
- 4) Member awareness.
- 5) Monitoring and evaluation.

The graphic represents the *external* and *internal* goals:



The following *strategies* were suggested to advance the five external and internal goals³.

External Goals (Membership, Education and Advocacy)

I) Membership Growth, Benefits and Services - Offer relevant benefits and services to members that result in effective retention and recruitment. (*Appoint a Membership Committee.*)

A) Database

- 1) Identify the population of school librarians practicing in the 614 Districts through the 2008 LMS survey; seeking 100 percent input. (*Board and Districts to assist staff in reaching 100 percent input.*)
- 2) Utilize the information for a comprehensive database of stakeholders (*members and prospective members.*)
- 3) Transform the survey results into demographic and economic impact report of the School Library Profession in Ohio.

B) Member Needs and Satisfaction

- 1) Conduct a survey in 2009; to include all members and a percentage of prospective members.
- 2) Responsibility of the Membership Committee to facilitate survey and report results to Board.

C) Member Communications

- 1) Maintain effective communications with members so they are aware of association history, timeline, achievements and goals.
- 2) Maintain effective communications amongst association leadership.

D) Student Members

³ Note: Wider right margin to allow for input of assignments, deadlines, notes, etc.

- 1) Provide student memberships and ensure a seamless transition from student to professional members.
 - 2) Appoint board liaison from the nearest Districts to interface with Wright State and Kent State Universities.
 - 3) Encourage OELMA Student Chapters at each university.
 - 4) Consider reduced conference registration for students.
- E) Mentorship Opportunities (*Task Force to be appointed.*)
- 1) Identify the needs of new librarians and students who seek guidance and mentors.
 - 2) Identify seasoned association members and retired librarians willing to serve as mentors and resources, i.e. Praxis III, state licensure process, etc.
 - 3) Promote the OELMA Mentorship as a benefit for members and students. Ensure confidentiality for mentor-protégé exchanges.
- F) Member Benefits and Services
- 1) Review the portfolio of member benefits and services and be sure they align with the results of the member needs and satisfaction survey.
 - 2) Identify benefits and services that should be available to members- only, using password protection and access restrictions to make benefits exclusive.
- G) Membership Growth
- 1) As the benefits are enhanced and strategic plan is underway, promote the work and value (ROI) to members and prospects.
 - 2) Increase membership from current benchmark of 550 as of May 2008 to a goal of 1,012 (all members including students) by the year 2012.
- H) Dues Structure

- 1) Review membership categories and changes in the profession to ensure all members are represented; considering paraprofessionals and others.
- 2) Periodically review dues amounts to ensure that dues paid show return on investment for members and also keep up with association costs; consider multi-year payment discounts.
- 3) Review dues billing cycles to best meet member needs and using technology to collect dues more cost effectively.



II) Professional Development and Resources for Librarians - Offer professional education and resources for the success of members.
(Align with Professional Development Task Force.)

A) Evidence Based Practice

- 1) Protect and market the EBP program; maintain product on a national basis as a revenue source for association.
- 2) Set performance standards and expectations for offering EBP education in Ohio.
- 3) Enhance value of EBP by adding on-line video for members only to website. *(Sue Subel)*

B) Technology Usage

- 1) Invest and use technology to develop and deliver relevant education and resources such as webinars, streaming video, etc.
- 2) Serve as a resource by cataloging and posting calendars and available webinars or courses; posting on OELMA website.

C) Best Practices Development

- 1) Identify and collect best practices from members; archive on website available to members, only.
- 2) Rely on seasoned and retired librarians to organize best-practices project and gather data.
- 3) Develop and coordinate systems of peer-to-peer consulting, peer visits to libraries and librarian shadowing as a member resource.

D) Regional Opportunities and Offerings

- 1) Develop guidelines to ensure that educational offerings are uniform and consistent in their delivery at the Districts.
- 2) Encourage cost-free events for networking of members and invitations to guests.

3) Align educational offerings with semester or quarter.

E) Annual Conference

1) Continue offering annual conference.

2) Ensure that the format and pricing best serves the profession and the association.

3) Explore potential partners in the conference.

F) Mid-Winter Conference - Offer mid-winter conference and professional development.



III) Advocacy and Government Relations - Relentlessly advocate for members and the library profession. *(Align with the Advocacy Committee)*

I) Grassroots - Utilize members in grassroots efforts to monitor and influence legislation and the budget funding process.

1) Familiarize members with the political process.

(i) Grassroots political session offered at the annual meeting.

(ii) Tools and resources on the website.

(iii) Existing national resources to encourage members to participate in politics.



2) Capitol Visits

(i) Ensure adequate representation at the national Legislative Library Day.

(ii) Plan annual visit to state Capitol by librarians through board members, eventually planning a statewide members' visit; delivering a consistent messages and positions on behalf of the state librarian profession.

J) Collaboration with Allied Organizations - Take a leadership role in collaboration to benefit the advocacy clout for school librarians.

1) Identify and appoint liaisons to allied organizations, including OLC, ALAO, OEA, State Chamber of Commerce, INFOhio, BASA, PTA-PTO, ODE and State Library.

2) Try to maintain consistent liaisons to each group, with longer-term assignments.

3) Active role in the Governors Education Reform Group

K) Lobbying Issues and Budget

1) Upgrade the role of the OELMA state lobbyist to monitor and

influence state budget processes and other critical issues to librarians. (*Budget consideration and lobbying RFP in fall 2008.*)

- 2) Monitor legislative opportunities and develop positions on behalf of school librarians, keeping members informed of the state and national issues and positions.
- L) Advocacy Chair - Ensure that the Advocacy Chair has appropriate linkage to the board of directors, i.e. ex-officio position. (*Review of Bylaws and Policy Committee.*)



External Goals (PR and Operations)

IV) Public Relations and Communications - Increase awareness of the roles and value of school librarians. *(Goal to be responsible of and integrated into all committees efforts.)*

- A) Image of the Librarian
 - 1) Strategically position librarians as "teachers of teachers" in the education system.
 - 2) Librarian-Tube: Explore development of a You-Tube style website created by OELMA.
- B) Website
 - 1) Invest in the time and technology necessary to make the OELMA website a relevant resource for members and information to the public.
 - 2) Develop a timeline of achievements over the 30-year history.
- C) OELMA Purpose and Distinction
 - 1) Take steps to help stakeholders understand and distinguish OELMA from other library organizations.
 - 2) Promote the newly adopted strategic plan to members.
- D) Community PR and Awareness
 - 1) Continue to provide press releases and notices to school boards and local media for promoting achievements of association leaders and members.
 - 2) Annually identify and bestow the designation of "Top 10 Libraries in Ohio."
 - (i) Identify criteria for designation top libraries; use AASL model.
 - (ii) Determine implementation.
- E) Lawmakers' Awareness

- 1) Inform lawmakers of the purpose of OELMA and the school library profession as it affects legislative and regulatory efforts.
 - 2) Recognize an elected lawmaker who goes above and beyond to benefit school librarians.
 - 3) Visit the Capitol in an organized event for librarians, annually.
- F) Leadership Recognition
- 1) Add “leadership service” as criteria for association awards and recognitions.
 - 2) Put a "face" on the association leadership with photos of board members in documents on the website and newsletter.
 - 3) Promote the purpose, work and achievements of the committees and task forces to increase member awareness.
- G) Code of Ethics - Explore development of a code of ethics or conduct for OELMA members.

V) **Association Excellence** - OELMA will be fiscally and structurally sound to allow for efficient governance and management on behalf of members. (*Align with Executive Committee, Bylaws and Policy Committee*)

A) Finances

- 1) Develop new income source to be less reliant on conference income for fifty percent of the annual budget.
- 2) Determine if meeting cancellation insurance is need for the conference because of the significant expense and revenue.

B) Leadership Development

- 1) Promote importance of assuming leadership roles in the profession and association.
- 2) Use training model and resources of AASL.
- 3) Use resources of Library Leadership Ohio.

C) Bylaws and Policies (*Bylaws and Policy Committee*)

- 1) Review the bylaws for appropriate updates.
- 2) Update the association policies to align with recommended IRS policies.

D) Strategic Direction

- 1) Carefully develop strategies that benefit multiple goals.
- 2) Review the 2008 strategic plan on an annual basis every winter; update in full about every third year.


E) Governance

- 1) Enhance board meeting effectiveness with best practices such as a consent agenda, timelines and alignment with the strategic goals.

2) Ensure that committee chairs have linkage and good communications with the board.

F) Foundation - Determine purpose and feasibility of creating an Ohio Librarian Foundation to receive grants, develop education, offer scholarships, etc.

Conference Posters




Mission-Purpose Statement
Advocate for school librarians as they educate students for success.

Vision for the Association
Ohio's preeminent professional association for highly effective school librarians and libraries.

Guiding Values

- Commit to educational excellence and academic achievement.
- Serve the needs of 21st Century learners and workers in a global society.
- Respect and promote diverse people and ideas.



Goals

- I. Membership Growth, Benefits and Services
- II. Professional Development and Resources for Librarians
- III. Advocacy and Government Relations for School Librarians
- IV. Public Relations and Communications
- V. Association Excellence in Serving Librarians