The Alberta Library

Strategic Plan

2015 – 2019

Together. One Card. One Click.

Current State – The Challenge to Moving Forward

The Alberta Library (TAL) operates in an environment that changes in highly compressed timeframes. Libraries change in response to the evolving needs of their clients and home institutions and these changes have implications for TAL. Similarly, changes in government structures and interests trigger significant changes to the TAL organization. In 2013, a reduction in funding from the provincial government was the catalyst for the restructuring of services relative to TAL's public library members and the Public Libraries Services Branch of the Ministry of Municipal Affairs. Change can be so rapid that TAL's continued existence depends on its ability to constantly evaluate and confirm its role amidst changing technologies, government priorities, and service models[1].

To inform TAL's current planning, a comprehensive environmental scan – including interviews with comparable Canadian and international library consortia leaders – was conducted, and an inward-reaching investigation of TAL's current and historic patterns, the Situation Audit, was undertaken. What is now before you, is TAL's response to these conversations and investigations. A response developed through extensive community input and iterative reflection upon the circumstances TAL finds itself within.

Of note, TAL is not alone. Driven by transformative technologies, funding pressures, the increasing complexity of the licensing landscape, and changing expectations of their member libraries, several other library consortia in North America are reshaping their futures at this time. Consortia that grew up in the 1980s[2] with a view to bringing libraries together for the "common good" are today expected to provide more than a social contract. Today, library consortia need to be service providers to their members. However, these consortia must differentiate these services within a space that has become crowded with commercial competitors[3].

From the focus groups, members surveys, and key informant interviews carried out during this design process, TAL members do not have a clear sense of TAL's role within this competitive space, particularly relative to the other organizations and agencies that support Alberta libraries[4]. Many TAL members are unable to explain their expectations of TAL, yet expect they will use TAL's services less frequently in the future[5]. While enthusiastically supporting a multi-type organization that fosters collaboration among libraries, members are less certain about the actual benefits such an organization can deliver[6]. This is most often expressed by the view that TAL is an advocate or

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[1] FTE fluctuation - 28 in 2007, 15 in 2013, 7 2014. Total revenues fell from about $11million in 2012 to $6.6million in 2014. In that same period, TAL's reliance on membership fees grew from 40% to 60% of total revenues.
[2] Dysart and Jones. The Alberta Library Final Report: 2014 Strategic Plan Environmental Scan.
3 Ibid.
[4] Extrapolated from stakeholder surveys.
[5] Ibid.
[6] Survey results show that almost all members agree collaboration is important for Alberta libraries but only 30% and 10% of public/regional and post-secondary libraries, respectively, rate current levels of collaboration as "good".

pathway to funding for initiatives rather than an effective mechanism for providing collaborative programs and services[7].

TAL's advocacy efforts will focus only on obtaining funding and other resources that allow it to implement and sustain the services and programming identified as a priority by TAL members.

TAL can assemble the expertise, resources, and networks to play an essential role as a membership-based, multi-type organization serving all Alberta libraries. TAL is uniquely suited to this role. To succeed in achieving this vision, TAL must be seen as the first choice to deliver technological and licensing solutions to its member libraries. It must also become a more effective organization and establish a new relationship with its members.

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[7] Survey results show that about two-thirds of our public/regional members cannot identify new services that TAL could offer to improve their situation, and a substantial proportion expect to use fewer TAL services in the future. Lack of familiarity with TAL services is an issue and it appears that member support is more strongly rooted in the services that TAL can provide then in the values and principles it promotes on behalf of all Alberta libraries.

TAL's Purpose, Vision, and Core Strategies

Purpose

TAL supports and enables members' access to the technologies, licensing solutions, and related services necessary to better serve their users.

Vision

TAL will be recognized for its membership focus and service, its organizational excellence, and its work with organizations that share TAL's interest in empowering Albertans through equitable access to library and information resources.

Strategies

Consolidate and streamline the identification, development, and delivery of technology and licensing solutions members require.

Strengthen the consortium with structures and practices that effectively serve our members, position TAL to seize opportunities, and anticipate future challenges.

Reinforce relationships with existing members and build the TAL membership base.
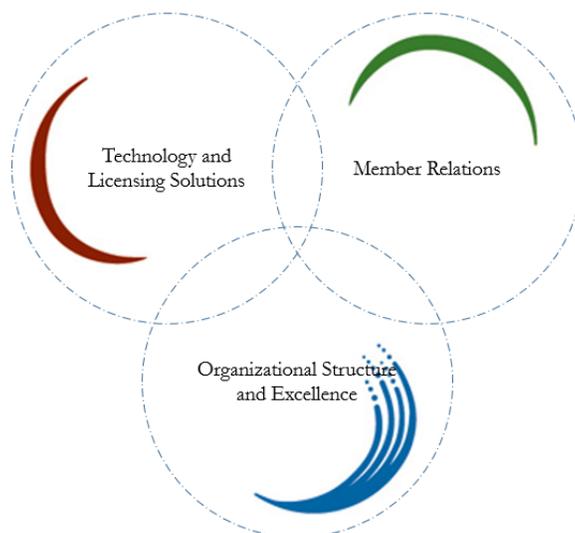
Strategy: Consolidate and streamline the identification, development, and delivery of technology and licensing solutions members require.

Alberta libraries are coping with transformational changes in technology. The issues are complex involving the licensing of e-books, streaming media, and new types of digital tools still in development. Choosing the best options requires dedicated analysis and expertise. TAL's primary focus in the years ahead will be to become the radar screen scanning this landscape to surface the most effective solutions for libraries and working with members to bring them to reality.

Initiatives to achieve this strategy:

1. Identify, influence and implement digital tools or solutions members need and determine how best to see the issue through to resolution, contributing to building Alberta libraries' reputation as a technology innovator to the wider library community.

2. Bring together those people in Alberta organizations and libraries undertaking research and strategic outlooks to compile, share and act on this research.

3. Identify what TAL and its members should know to keep abreast of technology and licensing developments impacting libraries and their users.

4. Explore and evolve effective solutions for members' user authentication.

5. Identify and implement technological solutions for improving reciprocal borrowing for users within any of the members' constituencies; ultimately eliminate the need for a physical TAL Card.

6. Investigate the best way of sharing member resources; currently this solution is TAL Online, and TAL will continually improve this product.

7. Be on the lookout for alternative licensing models, including open licensing agreements, and bring those that are most beneficial to the membership.

8. Host cross industry ground breaking symposia on strategic issues.

Strategy: Strengthen the consortium with structures and practices that serve its members, position it to seize opportunities, and plan for future challenges.

To invest our limited resources wisely for members' benefit, TAL must be efficient, focused, and responsive, with new operating approaches and direct member collaboration. TAL staff work in a demanding and competitive environment with a mission to serve a large and diverse membership. The challenge is to balance members' expectations and needs within the realities of staffing capacity. TAL's competent, committed core staff will lead TAL initiatives, and will rely on member resources and support to bring these initiatives to fruition for the benefit of all members.

TAL's governance model must match its operating environment where change is constant, windows of opportunity short-lived, and decisive immediate direction essential. Finally, TAL must move forward with its Provincial government partners, embracing clearly defined roles, eliminating competition and duplication, and acting in the best interest of Alberta libraries and Albertans.

Initiatives to achieve this strategy:

1. Develop a comprehensive approach to service evaluation and planning, focused on key outcomes, through which key service metrics are assembled; regularly review the needs of TAL members, document the costs and benefits of TAL membership; and formally evaluate the success of its programs and services.

2. Reforming TAL governance based on best practices for not-for-profit companies under the Companies Act; and update governance documents, including the Articles of Association, policies and procedures consistent with the restructuring.

3. Clarify the roles of and strengthen relationships with the Provincial Ministries of Education, Innovation and Advanced Education, and Municipal Affairs (Public Library Services Branch) to ensure consistency and coordination in the support and services available to Alberta libraries.

4. Review staff complement and competencies to ensure consistency with the service requirements and priorities of members.

5. Identify alternative methods to secure the resources required for projects, including investigating new revenue sources and strategies for augmenting TAL staff resources such as contracting out, outsourcing, and membership secondment or task forces.

6. Identify TAL Online financing to be ready for the expiry of the current license in June 2016.

Strategy: Reinforce relationships with existing members and build TAL's membership base.

TAL's stability and security as an organization depends on the commitment and involvement of its members. It is not enough to offer a service; TAL libraries must use the service, value the organization, support its goals and principles, and actively participate because they believe Alberta libraries need TAL.

To achieve this, TAL must redefine its relationship with members. This starts with new approaches to service delivery as described in the earlier strategies. Engaging members in the process of restructuring services will bring greater clarity to TAL's role and a more critical perspective to the assessment of its value to members.

Ultimately, TAL's purpose is to work with members to improve library service for Albertans. TAL will achieve this by offering services to members but also by engaging them in projects and plans that reflect our shared values of cooperation and collaboration, respect, innovation, learning and accountability. TAL offers leadership and facilitates relationships among members to exchange information, collaborate on projects, and learn from one another.

TAL requires a stable and secure funding model to achieve its Vision. To this end, we will explore new funding arrangements with our members and opportunities to expand our membership base to build our networks and secure additional resources.

Initiatives to achieve this strategy:

1.   Develop an engagement and communication strategy to exchange information, increase contact and add value to our relationships with members.

2.   Advance a membership recruitment and expansion program to consolidate TAL's existing membership and potentially offer membership, or partial memberships, to new sectors or organizations.

3.   Explore offering some services to non-members including interested parties outside the Province to build a larger network and to increase revenues.

4.   Scope and, as appropriate, pursue a new membership funding model that accommodates secure funding for long-term initiatives and base funding, perhaps on a multi-year model, that recognizes the sustainability required for complex technology and licensing initiatives.

Updating and implementing the Strategic Plan 2015 – 2019

Updating and Monitoring the Strategic Plan

TAL will regularly update this Strategic Plan and report progress to its members. The Board will revisit the Vision and Strategies on a regular basis to ensure they continue to reflect TAL's preferred future. Initiatives will be reviewed annually. As a living document, initiatives that have been completed will be eliminated and revisions and additions will be made as along the way. While some of the initiatives must accomplished early in the plan, and many others will be fully realized within the five year timeframe of this plan, TAL knows that it must continue to look beyond 2019 as it moves forward.

The Strategic Plan and Service Delivery

In addition to regularly updating the Strategic Plan, formal procedures will be adopted to ensure that the plan is used in the ongoing management of TAL. The initiatives identified in the Strategic Plan will be further defined and articulated in annual operational plans. In these operational plans priorities will be established, resources will be allocated, and success measures determined. Staff reports and recommendations to the Executive Committee and Board will be tied to the Strategic Plan. The annual budget process will also be connected to the Strategic Plan.

The Strategic Plan provides overall direction for TAL's future. However, other plans and studies will be required to successfully implement these strategies. TAL will review its governance model, organizational structure, staffing and other aspects of TAL to anticipate and respond to a changing future consistent with our Strategic Plan.