

EXECUTIVE SUMMARY

In 2000 the Canadian Association of Special Libraries and Information Services (CASLIS) recognized the need to address emerging issues and trends that affect both the association and its members. With this in mind, CASLIS created a Strategic Planning Task Force and embarked on a strategic planning process to help guide our association over the next five years.

Through this process CASLIS seeks to better understand our members, the issues they face and how the association can help them succeed.

All of the working documents created during this process are available via the CASLIS web site (www.cla.ca/caslis/). Working documents include CASLIS' Mission, Vision and Values statements. Other documents were created as the committee examined CASLIS and its environment. These include a SWOT analysis, focus group summaries from eight focus groups held around the country, and results obtained from a survey of CASLIS members. Overall, the process was highly consultative with CASLIS members through feedback requests at each stage of the process, the survey and focus groups.

The CASLIS Strategic Planning Committee developed the following goals based on information gathered from our members:

1. CASLIS will develop an active, diverse membership.
2. CASLIS will develop and provide services that are meaningful to its members.
3. CASLIS will continue to develop as a dynamic organization that is responsive to its members' needs.
4. CASLIS will ensure its membership is visible within the library, information management, and employee communities.

Effective with the 2003-2004 executive teams, the above strategic goals will provide a basis for CASLIS National and the local chapters to work together, in conjunction with members, to develop an operational framework for the next five years. This framework can then be expanded upon and revised by future CASLIS executive teams.

Strategic Planning Committee

- Tracey Palmer (CASLIS National President)
- Helen Kula (CASLIS National Director)
- Robyn Stockand (CASLIS Toronto Member)
- Anne Chesnutt (CASLIS Atlantic Member)
- Claudette Cloutier (CASLIS Calgary Member)
- Stephen Porrior (CASLIS Manitoba Member)

June 2003

CASLIS STRATEGIC PLAN 2003-2008

INTRODUCTION

History

The Canadian Association of Special Libraries and Information Services (CASLIS), a division of the Canadian Library Association (CLA), was established in 1969. Its predecessor, the Research Libraries Section of CLA, had been in existence since 1949.

CASLIS was formed to represent the concerns and interests of special librarians and independent information professionals. Chapters were established in Ottawa (1974), Toronto (1975), Edmonton (1976), Calgary (1976), Manitoba (1984) and the Atlantic Region (1992) to offer members professional development programs at the grass roots level and to actively build awareness in the community about the value of information professionals in their organizations. The Division and the Chapters also maintain websites and newsletters to facilitate networking with CASLIS members.

Background and Principles

CASLIS has never had a strategic plan of its own and has drawn guidance from the Canadian Library Association Strategic Planning documents to direct its planning process.

CASLIS has initiated this strategic planning process to prepare for the future. CASLIS membership is starting to decline and both Chapters and the Division report that volunteers are becoming more difficult to find and retain. Finally, CASLIS recognizes that it is but one of many organizations with which its constituency can choose to affiliate.

Overall, the process was highly consultative with CASLIS members through feedback requests at each stage of the process, the survey and focus groups.

The strategic plan that follows will allow CASLIS members to re-evaluate and re-invent the organization in a way that will enable the Division to survive and to grow in these challenging times. Throughout the strategic planning process, the Strategic Planning Committee has tried to adhere to the following four principles:

Achievability: CASLIS will strive to strike a balance between our ambition and our pragmatism when developing our strategic plan. Our goals and objectives will stretch us but will not strain us.

Accountability: Our strategic plan will reflect the input and feedback of our members. It will contain goals and objectives that are both clear and measurable. Our members and stakeholders will be able to evaluate our performance, using the final plan.

Respect: The opinions and ideas of the CASLIS membership are the foundation of our strategic plan. Their input will be treated with respect and integrity.

Communication: CASLIS will communicate regularly with its membership about the strategic planning process as it unfolds. Key documents will be made available for public viewing and comment. CASLIS will always be responsive to members concerns or feedback about the process or its outputs.

CASLIS VISION, VALUES AND MISSION STATEMENTS

Before the Strategic Planning Process could begin, the Strategic Planning Committee had to revise and in some cases create, vision, values, beliefs, and mission statements for the Association. These either did not exist or were very dated.

Vision

Our vision is to be the association of choice for Canadian information professionals who serve specialized clientele or work in specialized settings. CASLIS will be a vibrant, dynamic, visionary organization with a large and active membership. CASLIS will be known as an innovator among library associations in the delivery of world-class programs and services and for its ability to foster understanding and appreciation of our membership's professional expertise.

Values

As an association, CASLIS will strive to act on behalf of its members in accordance with the following values:

Innovation

CASLIS will be innovative and creative in all aspects of the design and delivery of its services. CASLIS will also encourage and support innovation among members in their workplaces.

Inclusivity

CASLIS will welcome everyone as members and will value the diversity of its membership.

Professionalism

CASLIS will act in a professional manner with regard to its members, volunteers, partners, and the larger community. CASLIS will uphold and expect the highest level of professionalism among its members in their workplaces.

Community

CASLIS will promote the development of relationships, partnerships and networks among members and stakeholders. Cooperation and collegiality will characterize how CASLIS undertakes its work.

Accountability

CASLIS is a grass roots organization owned by its members. The CASLIS leadership will be accountable to the membership for its stewardship of the organization's voluntary and fiscal resources.

Beliefs

CASLIS believes:

THAT information professionals create value and are an integral part of their workplaces

THAT information professionals who work with specialized clientele or in specialized settings are a valuable and vital part of the larger library and information management community in Canada

THAT professional associations are a necessary resource and support for the development of information professionals as individuals and as a community

Mission

The Canadian Association of Special Libraries and Information Services (CASLIS) exists to support and strengthen the community of Canadian information professionals who serve specialized clientele or work in specialized settings. CASLIS provides opportunities for learning, information exchange and networking to its members. CASLIS is an advocate for its community and promotes the value and skills that its members offer to employer organizations and the public.

STRATEGIC GOALS AND OBJECTIVES

In support of CASLIS' vision, mission, and values, the Strategic Plan is a framework to enable the CASLIS executive teams, members, and partners to make decisions that affect the future. Future operational plans should provide specific directions toward achieving CASLIS' strategic goals.

CASLIS Strategic Goals

1. CASLIS will develop an active, diverse membership.
2. CASLIS will develop and provide services that are meaningful to its members.
3. CASLIS will continue to develop as a dynamic organization that is responsive to its members' needs.
4. CASLIS will ensure its membership is visible within the library, information management, and employer communities.

CASLIS Strategic Objectives

1. CASLIS will develop an active, diverse membership.
 - a. The CASLIS membership will increase 15% over the next 5 years.
 - b. CASLIS will develop and implement a member recruitment and retention plan.
2. CASLIS will develop and provide services that are meaningful to its members.
 - a. CASLIS will foster the expansion of mentoring and networking opportunities, particularly in the area of non-traditional information roles.
 - b. CASLIS will leverage technology, partnerships and existing opportunities to enable access to continuing education, regardless of members' geographic location.
 - c. CASLIS will develop programming guidelines.
 - d. CASLIS will ensure that programming relevant to CASLIS members is available through a national conference.
 - e. CASLIS will compile and make available best practices for information and knowledge management relevant to CASLIS members.
3. CASLIS will continue to develop as a dynamic organization that is responsive to its members' needs.
 - a. CASLIS will compile and make available best practices for chapter administration and leadership.
 - b. CASLIS will restructure the governance of the division and the chapters to clarify the roles and responsibilities of each level of the organization.
 - c. CASLIS will evaluate the feasibility of paid administrative support dedicated to division and chapter activities.
 - d. CASLIS will develop and implement a volunteer recruitment and reward plan to encourage active participation in CASLIS and skill development by member volunteers.
 - e. CASLIS will create and market a brand identity for the division and its chapters.

4. CASLIS will ensure its membership is visible within the library, information management, and employer communities.
 - a. CASLIS will ensure the needs of its membership are communicated within CLA through an ongoing two-way dialogue.
 - b. CASLIS will build and maintain linkages with other relevant professional associations.
 - c. CASLIS will promote the value of its members' professional skills to the employer community and to the public.

REVIEW PROCESS

CASLIS will review the Strategic Plan annually and make any necessary revisions. The National Executive will also keep members informed on the completion of the strategic goals outlined in the plan at the Annual General Meeting. Towards the end of the life span of this Strategic Plan (2008), a review committee should be struck to renew the document.

FUTURE DIRECTIONS

Effective with the 2003-2004 executive teams, the strategic goals will provide a basis for CASLIS National and the local chapters to work together, in conjunction with members, to develop an operational framework for the next five years. This framework can then be expanded upon and revised by future CASLIS executive teams.

The Committee believes that some strategic objectives should be given greater priority, as they will create the foundation on which other objectives can be based. To this end, we have undertaken to create the following list, which we encourage the National Executive to consult when working on the implementation of the Strategic Plan. The items in this guide have been selected because we consider them to be vital to the success of the plan and/or they may take a significant length of time to achieve and therefore should be commenced quickly.

CASLIS will restructure the governance of the division and the chapters to clarify the roles and responsibilities of each level of the organization (Objective 3b).

Throughout the strategic planning process it became clear to the committee that there is a lack of clarity about the different roles played by CASLIS National and the chapters, as well as the responsibilities of each level of the organization. CASLIS National and the chapters will need to work very closely together to make this plan a success. As such, it is felt by the committee that in order for CASLIS to effectively move ahead with the goals and objectives of the strategic plan that the governance of the association must be in good order.

CASLIS will create and market a brand identity for the division and its chapters (Objective 3e).

This objective is considered absolutely fundamental to the success of the strategic plan. During the planning process it became obvious that the CASLIS brand was murky at best, and without a clear brand any marketing attempts will be wasted. The committee recognizes that the process of creating a brand can be time consuming and hence should be started at the earliest possible opportunity.

CASLIS will develop and implement a member recruitment and retention plan (Objective 1b).

A clear member recruitment and retention plan is necessary to achieve the ambitious goal of increasing the membership by 15% over the next 5 years. The development of objective 1b should take place alongside the development of the CASLIS brand.

CASLIS will compile and make available best practices for chapter administration and leadership (Objective 3a).

This objective comes out of the survey feedback and focus groups. It goes hand in hand with restructuring the governance documents for the organization. It is clear that the membership is affiliated more closely with the chapters than with CASLIS national and so it is to the benefit of the organization as a whole that the chapters are given the tools to effectively run the chapters.

CASLIS will develop and implement a volunteer recruitment and reward plan to encourage active participation in CASLIS and skill development by member volunteers (Objective 3d).

Again, the concept came through very clearly in the focus groups and survey feedback. CASLIS is a volunteer-based organization and as such must find ways to show volunteers that they are valued. This objective is considered a high priority because the committee feels that the sooner such a plan is implemented the sooner the organization will see the benefits of such a plan.

CASLIS will leverage technology, partnerships and existing opportunities to enable access to continuing education, regardless of members' geographic location (Objective 2b).

Our membership feels very strongly that CASLIS should be an active partner in providing professional development. While the committee feels that CASLIS on its own is limited in its ability to provide programming, it is certainly in the position to assist in the delivery of professional development activities to its members. This objective seeks to lay the foundation on which CASLIS will be able to better serve its members' professional development needs.

CASLIS will develop programming guidelines (Objective 2c).

This objective comes out of the focus groups. It is included here because it works together with objective 2b and is considered important to the success of any programming initiatives.