

PACSCL Strategic Plan 2003-2004

INTRODUCTION

History of PACSCL and the planning process

PACSCL is an organization of twenty-one member libraries in the Greater Philadelphia area. PACSCL and its member institutions work to expand knowledge of our cultural foundations, legacies, and issues by preserving essential documentation in their care and encouraging its use in education, lifelong learning, and advanced research. PACSCL was formed in the mid-1980s as a vehicle for collaborating on an exhibition of library treasures, *Legacies of Genius*, to share some of its documentary riches with a broader public. Its next project was a four-year collaborative effort to make member collections more accessible through projects such as a \$4 million cataloging initiative funded by The Pew Charitable Trusts.

When PACSCL was organized as a 501(c)(3) corporation in 1994, it described its mission as "to provide support to special collections libraries for educational, cultural and historic purposes." Projects undertaken since 1994 have included the creation of a consortial online public access catalog bringing all but one member online; a finding aids project; and an exhibition of medieval manuscripts, *Leaves of Gold*, at the Philadelphia Museum of Art, together with creation of a printed exhibition catalog, an interactive CD-ROM, and a comprehensive website. A particular concern of all of PACSCL's recent projects has been meeting the needs of member libraries and their several publics to make effective use of technological advances to increase access to special collections materials.

The strategic planning process has arisen out of a recognition that in order to continue to serve its members, and to strengthen support from its members and external stakeholders, PACSCL must have a clear mission, a vision flowing from that mission, an awareness of the challenges and opportunities facing it, and both long range goals and strategic objectives. To that end, members engaged in self-study through a questionnaire and series of discussions at quarterly meetings in 2001, and in a day-long retreat concentrating on PACSCL's future in January 2002. Preparations for this day were carried out by a consultant in conjunction with the Executive Committee. Subsequently the consultant worked with the Executive Committee and with the full Board to assess the organization's response to the ideas generated at the retreat and to prepare for the creation of a strategic plan.

This first plan is conceived as an interim two-year plan to allow PACSCL to test various initiatives in 2003 and 2004. During that period, PACSCL's Executive Committee will serve as the long-range planning group to continue assessing

important factors in the internal and external environment, and to evaluate the effectiveness in meeting the initial priorities on monthly basis and to report to the Board on a quarterly basis, with the goal of presenting a long-term plan at the December 2004 meeting based on the work outlined in this plan.

Important Factors in the Internal and External Environment

External Factors

Two important external trends underscore the importance of the materials in PACSCL collections to the city, the region, the nation, and an international community of scholars and suggest both long- and short-term priorities for the organization.

The first is the expansion of information technologies and in particular the Internet. The explosive growth of the Internet, the World Wide Web, and information technologies over the last ten years has transformed the research process, changing the way everyone from award-winning scholars to high school students, family historians and lifelong learners go about identifying relevant sources for their work. By now, nearly every academic library and large public library has replaced its traditional card catalog with a computerized system, searchable worldwide over the Internet. Moreover, the Internet has become the primary method of international scholarly communication, and is becoming increasingly common in schools, libraries, and homes throughout the world.

One result of this growth is an expanded appetite for information, together with an expectation that this information will be freely and immediately available. As technology grows increasingly more affordable, and as the public and private appetite for information continue to increase, PACSCL's member libraries have a growing opportunity to meet an important cultural need through projects that provide online access to cataloging data and through digitization of unique, significant, and rare collections.

The second trend is the Greater Philadelphia region's continuing emphasis on cultural and heritage tourism as an economic engine. The raw stuff from which tours, exhibits and programs -- and other "products" such as books and documentaries that stimulate a desire to visit the region -- are created is to be found in the collections of the region's museums and libraries. PACSCL members, in particular, are important information brokers for those who create the programs -- historians, scholars, filmmakers, educators, and interns. PACSCL collections provide both the information and in many cases the visual materials to help interpret the region's importance as the cradle of American government, as a philosophical, cultural and religious center, as an early leader in publishing, as an early industrial powerhouse known as "the workshop of the world," and as a first home for successive waves of immigrants over more than three centuries. Moreover, many PACSCL institutions are themselves current or potential tourism destinations. This is especially true for the kinds of high-end niche tours that, as Philadelphia Hospitality's Molly Espey puts it, convert tourists into goodwill ambassadors for the region.

In responding to both these trends, PACSCL is challenged by the need to secure external funding for collaborative projects. The funding base for such projects is almost exclusively from foundations and government sources, and funding priorities from these sources are changing.

Internal Factors

PACSCL comprises the single largest collaborative center of special collections libraries in the country; it and its member libraries are respected as repositories of history and culture in our region; PACSCL is respected for its accomplishments by area funders and by special collections libraries throughout the world. PACSCL institutions have excellent staff members, many with national reputations. Many of the institutions are parts of internationally-recognized museums, cultural institutions, and colleges and universities, which means that PACSCL can draw upon a wide range of expertise and facilities beyond the special collections libraries themselves.

The diversity of the collections held by its member libraries allows PACSCL to pursue a broad range of initiatives, with no individual member obligated to participate in those projects not of interest to that organization, as demonstrated by PACSCL's online public access catalog, finding aids, and *Leaves of Gold* projects. This diversity of collections and organizational capacities creates a challenge insofar as it makes it difficult to structure an array of programs to meet all member needs. It also makes it difficult to create programs that showcase all members at the same time, as with the inaugural *Legacies of Genius* exhibition.

From this diversity come other challenges to the organization's successful operations. PACSCL and special collections libraries have a low profile among the general public in the Greater Philadelphia area and among some important influencers; this hampers PACSCL's ability to gain funding for its projects. Among larger PACSCL institutions in particular, the PACSCL board representative may not be that institution's decision-maker, which can slow down the speed with which the organization can take action. A survey of area funders undertaken as part of the self-study, revealed that PACSCL is perceived as lacking in follow-through. PACSCL also is challenged by current constraints on funding for day-to-day operations, its need for infrastructure improvement, and its imprecise guidelines for decision-making.

Despite some of its internal and external challenges, PACSCL members see clear present value and future potential in the organization. PACSCL's record of success has created a sense of commitment to PACSCL among most of the member institutions.

FOCUS FOR THE FUTURE

Working collaboratively to share, preserve and add to one of the world's greatest collections of libraries, PACSCL will continue to focus on helping members to improve access and collections care for the material in their collections and to educate our several publics. It must

help our elected officials and the funding community to understand the meaning and importance of the materials held in member libraries. It must explain the role these collections can play in supporting the research of an international community of scholars, in developing among students an appreciation of our cultural and historical heritage, in increasing cultural tourism to our region, and in encouraging our own area residents to make better use of regional special collections resources. It must be creative and persuasive in seeking funding for access, outreach, and staff development projects and in advocating for public policies that support the cataloguing, study, exhibition and preservation of member holdings. And it must focus on helping members to improve the quality of service delivery, including the incorporation of new initiatives in technology.

To meet these challenges, PACSCL will

- continue to articulate the contributions of member collections to international scholarship and public cultural life
- focus on helping members improve services to meet the needs of their core constituencies, the international scholarly community and the general public;
- heighten PACSCL's visibility while engaging with an expanded group of policy makers and stakeholders, particularly in the foundation and corporate grant-making communities;
- work to increase the public support and money available for access and collections care;
- work to help strengthen members' organizational capacity through staff development and communications.

MISSION STATEMENT

The Philadelphia Area Consortium of Special Collections Libraries (PACSCL) is a nonprofit collaboration among libraries and archives whose collections, in their depth and variety, comprise an internationally important body of unique materials for students, scholars and life-long learners.

PACSCL provides a forum for the identification and discussion of matters of mutual interest and collaborative programs to:

- strengthen collections
- improve preservation of and access to collections
- facilitate professional development and communication
- mount public programs and otherwise engage with their several publics.

As stewards of this documentary heritage, PACSCL members seek to share their resources with the broadest possible audience.

OUR VISION

- The Philadelphia area generally and the group of PACSCL member libraries in particular will be known regionally, nationally, and internationally as one of the country's leading repositories of rare books, manuscripts, photographs, prints, architectural drawings, and works of art on paper.
- All materials in the collections of PACSCL libraries will have web-mounted catalog records or encoded finding aids accessible to every potential user. These data records will include or be linked to digital images of books, manuscripts, graphics or other objects where appropriate, allowing users full access to collections from outside the library.
- PACSCL will be strongly linked with the Greater Philadelphia educational establishment, K-12 through postdoctoral studies, as well as with community groups to provide resources and programs for curricula, including lifelong learning, for residents of the region.
- Information on PACSCL member collections and programs will be readily available in the tourism and leisure travel community, and PACSCL members will be active participants as information brokers in the creation of specialty tours and information campaigns to increase leisure travel to the Philadelphia area.
- PACSCL will be recognized as providing a national model for regional collaboration among special collections libraries, including utilization of technology in program delivery.
- PACSCL member library staff will be trained to the highest level in their disciplines and will also be fully aware of collections, resources, and available expertise at other member libraries.

KEY LONG RANGE GOALS AND STRATEGIC OBJECTIVES

I. Strengthen the role of PACSCL as a model for regional collaboration.

- Strengthen access to collections through innovative uses of technology, with the goal of allowing PACSCL's many publics easy electronic access to resources of all member libraries
- Provide for cooperative collection development as appropriate
- Raise skill and knowledge level of member staff

- Continue to develop opportunities for networking and becoming familiar with other member institutions among member staff
- Publicize PACSCL successes within professional organizations

II. Link PACSCL and its member libraries more firmly to the educational community, including lifelong learners.

- Increase partnerships between groups of PACSCL member libraries and educational institutions to develop curriculum support materials for use in elementary and secondary education (public, parochial, other private)
- Encourage lifelong learning opportunities that involve use of PACSCL member collections and programs

III. Strengthen the role of PACSCL as advocate for professional issues, educator, and marketer so that a wide range of stakeholders are aware of the importance of PACSCL member collections and mobilized to help to improve access and collection care.

- Develop innovative programs that tie community needs with access and preservation and make the case with funders
- Heighten the visibility of special collections libraries (tourism liaison, etc.)
- Educate the various publics about resources available to them through member libraries
- Expand advocacy role of PACSCL on behalf of its member libraries
- Keep the focus on the member libraries and the collections, with PACSCL itself taking more of a background role.

INITIAL PRIORITIES.

This plan has a two- to three-year timeline and will form the basis for a five-year plan to be developed in late 2004.

I. Strengthen the role of PACSCL as a model for regional collaboration: Develop compelling new initiatives for access and collections care, ones which will also share collections more broadly, meet important social needs, raise member library visibility and build new constituencies.

- Develop cataloging initiatives.
Year 1: Survey members to assess cataloging backlog for their printed collections; develop funding proposal to address the backlog.
Year 2: Evaluate and assess
- Identify topical subcategories that will among them embrace all PACSCL members and develop full-scope preservation and access projects, with public component, for each.
Year 1: Develop a digitization project focused on Greater Philadelphia and seek funding. Identify other topical areas
Year 2: Evaluate and assess. Develop projects for other topical areas and seek funding. (See Note 1 for some models)
- Explore a PACSCL institutional membership in ALA, ACRL, SAA (*Year 1 goal*) and publicize PACSCL successes within these institutions.

II. Create educational programs to increase visibility among public officials, other funding entities, and to build constituencies

- Build relationships with educational institutions
Year 1: Survey PACSCL members for existing relationships and best practices; find ways to broaden these relationships to involve groups of PACSCL member
- Develop curriculum support materials
Year 1: Identify potential partners, topics, participating libraries; seek funding
Year 2: Produce product; begin using in fall term.
Year 3: Query users, assess
- Publicize member fellowship programs; develop a PACSCL fellowship program
Year 1: Consolidate information on member fellowship programs in one place on PACSCL website. Survey members for interest in funding for a PACSCL fellowship; seek funding.
Year 2: Implement PACSCL fellowship(s)
Year 3: Evaluate and assess

- Create a PACSCL library internship program
Year 1: Assess member interest in having library interns. Discuss with Drexel University.
Years 1/2: Begin pilot program with small number of interns. Evaluate; decide whether to proceed.

III. Advocate, educate, market

- Support cultural, heritage, and niche tourism
Year 1. Member participation in cooperative online calendars; create new PACSCL brochure; liaison with Philadelphia Hospitality; strengthen relationship with Greater Philadelphia Tourism & Marketing Corporation, Mayor's Office of Arts & Culture, Greater Philadelphia Cultural Alliance; explore the idea of a special collections library Trolley Tour as suggested by GPTMC.
Year 2. Evaluate and adjust as needed
- Implement additional cost-free or low-cost short-term projects as generated by the outreach committee.
Year 1: Provide a PACSCL lecturer at the Philadelphia Flower Show. Identify other opportunities to have PACSCL speakers gain visibility. Develop self-guided book lovers' walking tour of the Historic District as model for other areas and other topics. Consider other projects.
Year 2: Evaluate and adjust as needed.
- Revive the PACSCL newsletter as an occasional electronic publication.
Year 1. Plan an achievable publication, with a target first issue in September 2003. Set plan for contents (e.g., showcase four libraries per issue, include calendar and news briefs). Recruit an editorial board among PACSCL member staff (with an obligation to "give or get" one article per issue). Develop a plan to publicize the project and develop an electronic mailing list.
Year 2. Produce two to four issues, depending on interest. Conduct reader survey in October.
- Seek a PACSCL member or members willing to make some PR staff time. available for development of a longer range outreach and communications plan
Year 1. Recruit PR staff (Jan - Mar); develop plan (Apr-Jun); seek funding (July-Dec)
Year 2. Implement, evaluate, assess.

IV. Assure that the broadest possible number of PACSCL staffers are kept informed of PACSCL activities and participate in programs

- Invite broader range of staff members to quarterly meetings.
Year 1 and 2. Ongoing. Continue; evaluate and assess, ongoing.

- Encourage the use of PACSCL-L listserv to share information on member library programs and PACSCL policies and initiatives.
Year 1 and 2. Ongoing. Continue; evaluate and assess, ongoing. Consider circulating PACSCL quarterly minutes to broader range of staff.

V. Increase opportunities for networking and sharing expertise among member institutions' staff

- Have at least one purely social PACSCL event each year to allow mingling among staff members
Year 1 and 2. Hold events; evaluate and assess.
- Create a member expertise directory and place it on the PACSCL website
Ongoing. Survey members in fall 2003 to determine usefulness of this feature.

VI. Create formal programs for staff development

- Year 1. Expand on survey results to suggest staff development programs. (Note: One program, XSL stylesheet training to help members put manuscript finding aids on their websites, is already scheduled for February 2003). Select and implement an additional training program.
Year 2. Evaluate and assess; continue training development as appropriate.

VII. Build an organizational structure to support vision and long term goals:

(These are all Year 1 priorities and will be evaluated and adjusted in Year 2).

- **Increase working hours of part-time executive director to 20 hours/week effective January 1, 2003 and provide office space and equipment at a member library.** Support this level of organizational expense for 2004 and beyond by seeking a capacity-building grant to provide funding for salaries, equipment, stationery, office, promotional materials, etc. Develop policies for decision making by convening ad-hoc committees on outreach, access, and professional development and creating guidelines for evaluating proposals (see note 2)
- Improve Board meetings by empowering Executive Committee as primary decision-making body.
Year 1. Appoint a small committee to review and revise the by-laws by the June 2003 quarterly meeting.
- Create a mechanism, such as an annual meeting that includes approval of goals and programs for the coming year, to involve decision-makers at member institutions with setting PACSCL's direction.
Year 1. Charge the Executive Committee with recommending a mechanism by

June 1; implement.

Year 2. Assess and adjust as necessary.

- Recruit a small task force to be responsible for ongoing strategic and long-range planning. For at least the first half of 2003, this will be the executive committee; the task force may be adjusted as appropriate.

Years 1 and 2. Ongoing, with goal of developing a five-year strategic plan in Fall 2004.