

TO: ALA Executive Board

RE: Washington Office Strategic Plan 2018-2020

ACTION REQUESTED/INFORMATION/REPORT: Review by and guidance from the ALA Executive Board

ACTION REQUESTED BY: Kathi Kromer, Associate Executive Director, Washington Office

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DRAFT OF MOTION: None

DATE: September 18, 2017

BACKGROUND: This plan outlines the Washington Office's vision for the next three years (2018-2020) to best position the American Library Association and our members to achieve our public policy priorities in the future.

AVAILABILITY: No restrictions

ATTACHMENTS: DRAFT Washington Office Strategic Plan 2018-2020

WASHINGTON OFFICE STRATEGIC PLAN 2018-2020

This document outlines the Washington Office's three-year plan to best position the American Library Association and our members to achieve our public policy priorities.

**Prepared for the ALA Executive Board
by Kathi Kromer
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October 27, 2017**

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Executive Summary

To commemorate the 50th anniversary of the Washington Office, Lawrence Molumby, a lifelong American Library Association (ALA) member and former assistant director of the D.C. Public Library, compiled a 140-page chronological list of our legislative and policy accomplishments. In his introduction, he wrote: “Most librarians know in a general way that the Washington Office has served us, our institutions and our patrons very well. But I doubt that many of us have any inkling of the wide variety of issues—issues that affect us profoundly—that are monitored and acted on by the Washington Office.”

More than twenty years have passed, and I believe Molumby’s observation is still accurate.

Since 1996, ALA’s Washington Office has had many successes (see Appendix A). In 2003, we lobbied to reauthorize the Museum and Library Services Act, which doubled funding for the Library Services and Technology Act and created the Laura Bush 21st Century Librarian Program. In 2010, we pushed for an order by the Federal Communications Commission that enabled broader fiber options for libraries and provided automatic inflation adjustments for the E-Rate program. In 2014, in part thanks to the Washington Office’s efforts, the Google Books lawsuit case resolved favorably to strengthen fair use in digitization. And in 2016, the president signed a comprehensive Freedom of Information Act reform bill after 10 years of library advocacy. In addition, over the past 10 years the Washington Office has raised more than \$6 million dollars, including more than \$1 million that benefited other ALA divisions, from partners like Google, the Bill and Melinda Gates Foundation, and the John D. and Catherine T. MacArthur Foundation.

Today, however, many of these achievements are under immediate threat. We are in the middle of a historically challenging, unpredictable period in our nation’s history. As a result, the variety of issues that the Washington Office monitors and acts on continues to grow. Simultaneously, our relationships with legislators and other decision makers are in flux. These factors amplify one another, making the strength and clarity of ALA’s voice in Washington more crucial now than ever before.

We drafted this strategic plan because we are committed to defending our gains and creating new opportunities for libraries at the national level. The goals within this strategic plan are calibrated to position the Washington Office—and ALA—to build the relationships we need to ensure our future success. Likewise, the actions in this plan are aligned with elements of ALA’s larger strategic plan and directions and it complements the Advocacy Implementation Plan presented to the board in 2015.

Within this document, we have outlined four goals we need to focus on over the next three years:

Build a Stronger Advocacy Foundation

In this section, we outline how we will strengthen connections between ALA members and members of Congress as well as others who advocate on our behalf. Our vision is to focus on strategic relationship building.

Improve Reputation and Visibility of ALA in Washington

In this section, we outline how we will position ourselves as the public policy experts in Washington for library interests and resources. Our vision is that we are the first phone call any

member of Congress, regulatory agency, or member of the Administration makes when an issue involving libraries arises.

Modernize our Information Management and Communications

In this section, we outline how we will capture, create, and communicate knowledge. Our vision is that the Washington Office will proactively coordinate, manage, and distribute information as a strategic asset.

Focus our Policy Priorities

In this section, we outline how we will focus our position, defend our gains, and create new opportunities. Our vision is to develop policies and programs that create the social, economic, and environmental conditions in which libraries can thrive, while also aligning and mobilizing staff and advocates.

With your advice and approval, we want to focus these next three years on improving our position, leveraging change, and increasing the value we provide to: ALA's members; members of Congress; to regulatory agencies; and ALA affiliates, libraries, and library patrons across the nation. As you read this plan, please know that the strategy laid out is a living and breathing document—a work in progress that will guide us, help to marshal resources, and give us something to measure ourselves against.

I welcome your questions and guidance so we can refine the plan and act in a coordinated fashion to support and advance ALA's goals.

Approach to the Task

The ALA October board meeting arrives only a few days after the Washington Office's 71st birthday and marks my first four months with the Association. Since my arrival in June, I have conducted a "listening tour," soliciting feedback about the Washington Office from all corners of ALA. I have also connected with stakeholders on the Hill and our coalition partners to learn about their perceptions of ALA. Overall, the feedback from staff in D.C. and Chicago was consistent: the Washington Office needs a plan. And the comments from members of Congress, agencies, and others we work with echoed this feedback: the Washington Office—and the American Library Association as a whole—needs focus.

I bring to ALA more than 20 years' experience working with Congress as well as with state governments, and have been a key architect in creating and implementing policy at both the federal and state levels. Likewise, I have extensive experience expanding national grassroots advocacy programs and creating state advocacy programs that generate funding and impact policy. Hearing this feedback about the need for focus from internal and external sources was a red flag for me, and something I know we need to solve to be successful going forward.

The strategic planning conversations in the Washington Office began in early July. It had been some time since the Washington Office staff had inspected how we prioritize our work, marshal and deploy resources, and examine how our activities align with the rest of the Association. We identified the forces that affect our success and productivity. Our discussion covered how the political landscape is changing, what these changes suggest about the focusing of our work, and the Washington Office's broad challenges and opportunities.

The drafting of this document has been a valuable opportunity to inventory our portfolios of work and to articulate how our portfolios align with ALA's divisions, mission, and strategic directions. In addition, the construction of this document created an opening to check in with our partners across the organization. This strategic plan was reviewed by several key ALA stakeholders. We received feedback from the directors of the Association of College & Research Libraries (ACRL), the Public Library Association (PLA), and the Young Adult Library Services Association (YALSA) as well as directors of several cross functional offices: the Office for Diversity, Literacy, and Outreach Services (ODLOS), the Public Awareness Office (PAO), the Office for Library Advocacy (OLA), the Chapter Relations Office (CRO), and the Development Office. We also shared the document with the leadership of the Office for Intellectual Freedom (OIF) and United for Libraries.

Early in the deliberations, conversations with staff defined two key questions facing us: First, how can the Washington Office develop our advocacy efforts and influence in the context of limited or constrained resources? Second, what relationships do we need to build to achieve our goals?

In response to the first question, we are collaborating with the ALA Development Office to cultivate and increase sponsorships. We are also seeking opportunities to creatively partner with divisions and other offices to reduce areas of duplicative effort. Of course, there is always a tension between having ambitious aspirations and being realistic about the availability of resources to fund priorities identified in this plan.

The second question is the driving force behind this document. Each component of this plan has the same core purpose: developing high-quality relationships in strategically critical areas.

Four themes underpin the objectives and actions proposed in this plan:

1. Focus
2. Resilience
3. Coordination
4. Efficiency

To become more focused, we need to make difficult choices about which areas of work to emphasize and which to de-emphasize. To become more resilient, we need to improve our systems and habits to better manage and respond to change. To improve coordination, the Washington Office needs to focus on achieving strategic priorities in collaboration and coordination with our Chicago counterparts. To be more efficient, we need to examine our advocacy structures and strategies carefully, with an eye toward creating a tighter fit between our methods of accomplishing tasks and our goals.

This plan in its current form serves as a strategic overview laying out our four major goals and their corresponding objectives. Starting in 2018, we will introduce a second component: a portfolio scorecard, which will focus on results and provide a common framework for reporting on progress toward our objectives.

Goals, Objectives, Strategies, and Actions

Goal 1 | Build a Stronger Advocacy Foundation

ALA is an organization with a culture of advocacy. We need to better apply this commitment through new and more sustained relationship-building. Successful relationships with targeted members of Congress are only possible through robust grassroots and grassstops networks. To be effective in influencing Congress, ALA needs to develop persuasive, compelling, dependable local-level advocates and connect them directly to their elected officials and policy makers to tell their library story. We need more champions from both sides of the aisle and in both chambers. Libraries are vying for a piece of an ever-shrinking budget and our competition is well-organized, well-funded, and emotionally compelling. Finally, we need to refocus on how the Washington Office serves the organization as a centralized public policy department and leader on government relations.

Goal 2 | Improve the Reputation and Visibility of ALA in Washington

National decision makers need to know who we are, what we care about, and how we can be a resource for them in a way that can advance our public policy priorities. The competition for resources is significant and likely to increase. While ALA and libraries have an excellent brand, we do not have the millions or billions of dollars of influence commanded by telecommunication companies or content providers. As a result, it is vital that ALA leverage our brand and the Washington Office's knowledge to stay at the table. In addition, we must reinvigorate our relationships with the Committee on Legislation and the Office for Information Technology Policy's Advisory Committee so they can serve as a leading voice on federal policy issues within the library community.

Goal 3 | Modernize our Information Management and Communications

The Washington Office needs to manage information as a strategic asset. The knowledge and understanding created and held by the Washington Office needs to be captured to benefit all of ALA's staff, members, and communities. While there is no single application or project that will address and resolve all ALA's information management needs, we need to upgrade our ability to capture, organize, share, and retrieve information about our constituents and target policy makers. In addition, we need to be able to synthesize the information we are gathering with information we already have, with the end goal of *creating* new knowledge on which we can act. Getting clear and timely information and messages to ALA members, and other audiences—including Congress, policy makers, the media and other influencers—is essential to achieving the goals of this strategic plan.

Goal 4 | Focus Policy Outcomes

The current Congress and administration bring uncharted challenges and possibly new prospects, and the corporate and non-profit worlds present opportunities. In a time of demanding challenges to library resources, public policy objectives, and library values, we must maintain our position in the most critical areas. Our ambition above all is to influence decision makers to provide equitable access to information. Likewise, we are steadfast in our commitment to review and advocate for information policy positions and strategies through the lenses of equity, diversity, and inclusion. First and foremost, we need to focus on rebuilding our strength and reputation, infusing ourselves into the policy infrastructure and, candidly, preparing ourselves for a more favorable climate.

Appendix A: Selected Achievements from 2001-2017

Compiled to illustrate—not fully catalog—the scope and significance of the Washington Office’s work.

Year	Activity
2001	<ul style="list-style-type: none"> • Overbreadth of PATRIOT Act surveillance powers visibly publicized and protested.
2002	<ul style="list-style-type: none"> • DOE Improving Literacy Through School Libraries program authorized.
2003	<ul style="list-style-type: none"> • Library Business Alliance organized and marshalled to obtain federal funding • Reauthorization of Museum and Library Services Act, doubles funding for LSTA and creates new Laura Bush Program
2006	<ul style="list-style-type: none"> • Creation of library disaster fund through partnership with NEA & Dollar General Foundation
2007	<ul style="list-style-type: none"> • ALA Washington Office leads “Day on the Hill”
2008	<ul style="list-style-type: none"> • Loan forgiveness program adds inclusion of library students • Library eligibility included in American Recovery and Reinvestment Act (establishing the \$4.7 billion Broadband Technology Opportunities Program)
2009	<ul style="list-style-type: none"> • ALA Washington Office leads U.S. Senate rally for 2,000+ ALA members
2010	<ul style="list-style-type: none"> • Libraries included in substantive way in National Broadband Plan • Reauthorization of Museum and Library Services Act • Adoption of 6th Report and Order by FCC that enables broader fiber options for libraries and provides automatic inflation adjustments for E-rate program
2011	<ul style="list-style-type: none"> • FCC announces Connect America Fund to serve libraries and other community anchor institution • OITP launches Digital Literacy Task Force at Midwinter meeting • ALA launches program: Education Reform and the SKILLS Act
2012	<ul style="list-style-type: none"> • Innovative Approaches to Literacy (IAL) created in Elementary and Secondary Education Act (ESEA) (Replacing Improving Literacy Through School Libraries)
2013	<ul style="list-style-type: none"> • ALA members deliver to Congress thousands of Declaration for the Right to Libraries
2014	<ul style="list-style-type: none"> • Washington office produces webinar: Libraries & E-Government • Google Books lawsuit case resolved favorably to strengthen fair use in digitization • Big Five publishers provide access to library ebook lending thanks to efforts of ALA Digital Content Working Group • Policy Revolution! launched to re-envision library advocacy towards decision maker perspective, enabled by \$1 million grant from Gates Foundation • Libraries included in authorization of Workforce Innovation and Opportunity Act (WIOA)
2015	<ul style="list-style-type: none"> • Creation of library National Public Policy Agenda • E-rate funding increased from \$2.4 to \$3.9 billion, rules modernized • ALA work on NSA reform recognized by <i>The Hill</i> • FCC issues Open Internet Order

2016	<ul style="list-style-type: none"> • Congress passes Every Student Succeeds Act (ESSA) expanding eligibility of libraries and librarians to participate in various Title programs • DC Circuit Court decision upholding FCC Open Internet Order • IMLS funding increased \$2 million • IAL funding increased \$2 million • For first time, ALA engages in Republican and Democratic National Conventions and submits input for the party platforms • ALA establishes Public Policy Advisory Council to institutionalize engagement with technology industry and NGOs • Spark advocacy videos • Carla Hayden confirmed at Librarian of Congress, Hayden was a former ALA President • ALA Washington Office work on FOIA Reform recognized for “Top Lobbying Victory” by <i>The Hill</i> • Congress provides \$400 million funding for Title IV (Part A); role of libraries to participate in Title enhanced by 2015 ESSA
2017	<ul style="list-style-type: none"> • National Library Legislative Day attendance topped 500 attendees • ALA Washington Office worked to create Corporate Committee for Library Infrastructure (CCLI) • Libraries Ready to Code launches third phase, grant program for libraries across the nation • Launch of inaugural ALA Policy Corps initiative