Klingberg, Susan; And Others

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Association of Coll. and Research Libraries, Chicago, Ill.

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Academic Libraries; Higher Education; Library Associations; *Library Planning; Library Services; *Long Range Planning; Mission Statements; Needs Assessment; *Objectives; Professional Development; Public Relations; Recruitment; *Research Libraries; Research Opportunities; User Needs (Information)

ABSTRACT

The 5-year plan of the Association of College and Research Libraries (ACRL) is presented, and the four goals of the plan are summarized: (1) to contribute to the total professional development of academic and research librarians; (2) to enhance the capability of academic and research libraries to serve the needs of users; (3) to promote and speak for the interests of academic and research librarianship; and (4) to promote study, research, and publication relevant to academic librarianship. In addition, the following aspects of the plan, planning process, and implementation are discussed: working principles underlying the plan; the planning model; the planning process; executive summary of goals, objectives and their sources; mission statement; strategic management directions; and implementation (overview, timeline, recommended changes in financial policies, development of the annual operating plan, and dissemination). A Member Needs Report, Strategic Factors Report, Strategic Audit Report, Resources Report, and "A Proposed Planning Process for the Association of College and Research Libraries" are appended. (KM)
STRATEGIC PLANNING FOR ACRL

Final Report of the ACRL Strategic Planning Task Force
Susan Klingberg, Chair
David F. Bishop
Sharon A. Hogan
Donald Riggs
Keith W. Russell
Carla J. Stoffle
JoAn S. Segal

Presented to the ACRL Board
and approved, July 1, 1986
ALA Annual Conference, N. Y.
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MEMORANDUM

Date: May 13, 1986

To: ACRL Board of Directors

From: ACRL Strategic Planning Task Force

The Task Force is pleased to submit the attached report Strategic Planning for ACRL. It contains the five-year strategic plan the Task Force was charged with developing. Because the planning process relied on the preparation of analyses and reports on subjects such as members' needs and environmental factors, the key working papers have also been included.

In the course of its work, the Task Force has thoroughly examined ACRL's resources and its wide range of activities. We have received a great deal of assistance and support for our project from many levels within ACRL, including members, elected leaders, units, and staff. Given its resources and active membership, ACRL faces a bright future.

Susan Klingberg, Chair
David F. Bishop
Sharon A. Hogan, ACRL President
Donald Riggs
Keith W. Russell
Carla J. Stoffle
JoAn S. Segal, ACRL Executive Director (ex officio)

Note: Dr. Stevan Holmberg, Consultant and President of the Professional Management Research Group, presented a workshop on strategic planning for the Task Force at the outset of the project.
I. INTRODUCTION
A. Working Principles Underlying ACRL Strategic Plan

1. ACRL supports the professional development of academic and research librarians in a variety of ways:
   - opportunities for professional development should be made more accessible
   - through lowered fees
   - through regional offerings
   - members should help determine the content, and format, of such opportunities
   - cooperation with other associations should be supported in this area
   - awards are an effective way to promote a sense of professional identity

2. ACRL assists its members with career placement.

3. ACRL helps members to provide good service to users.
   - develops and promulgate standards and guidelines
   - helps librarians understand the accreditation process
   - plays some role in the provision of timely and accurate statistics
   - provides advisory services
   - encourages and evaluate innovation
   - helps libraries which serve minorities

4. ACRL works to increase understanding and appreciation of the role of libraries among members of the academic community (faculty, administrators, trustees, and friends).

5. ACRL works to increase understanding and appreciation of the key issues in higher education among librarians.

6. ACRL is the organization that is perceived as speaking for the academic library profession on issues of importance to higher education and academic and research libraries.

7. ACRL plays a role in influencing legislation and funding for academic and research libraries.

8. ACRL plays a role in recruitment and retention of academic and research librarians.

9. ACRL helps shape library education in accord with the needs of academic and research librarianship.

10. ACRL is committed to advancing knowledge and practice through the provision of a climate conducive to the conduct and dissemination of research.

11. ACRL serves the needs of segments of the academic and research library community even if such service cannot be made self-supporting.

12. ACRL is a strong, well-managed professional association capable of carrying out the substantive program contained in the Plan.

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<table>
<thead>
<tr>
<th>STEPS</th>
<th>PRODUCT</th>
<th>RESPONSIBILITY</th>
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<tbody>
<tr>
<td><strong>APPRAISAL</strong></td>
<td></td>
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<tr>
<td>(1) Analyze member needs</td>
<td>MEMBERS' NEEDS STATEMENT (based on existing membership data &amp; analysis of President's survey)</td>
<td>ACRL hq. staff, with assistance from Membership Committee and President's Research Team</td>
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<td>(2) Analyze external environment</td>
<td>EXTERNAL FACTORS ANALYSIS STATEMENT (including review &amp; update of activity model reports)</td>
<td>ACRL Planning Committee (Ball, McDonald, Klingberg, etc.)</td>
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<td>(3) Identify strategic factors</td>
<td>STRATEGIC FACTORS REPORT (based on steps 1 &amp; 2)</td>
<td>Task Force (Segal)</td>
</tr>
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<td>(4) Conduct a strategic audit</td>
<td>STRATEGIC AUDIT REPORT</td>
<td>ACRL hq. staff and Task Force (Segal &amp; Hogan)</td>
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<td>(5) Review &amp; revise ACRL mission, goals, &amp; objectives</td>
<td>Written revisions, if necessary</td>
<td>Task Force (Russell)</td>
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<td><strong>STRATEGY FORMULATION</strong></td>
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<tr>
<td>(6) Carry out activities planning</td>
<td>ACTIVITIES PLANNING REPORT (written recommendations, including ACRL publications)</td>
<td>Task Force (Bishop &amp; Riggs)</td>
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<td>(7) Carry out resources planning</td>
<td>RESOURCES PLANNING REPORT (including relationship of ACRL to ALA)</td>
<td>ACRL hq. staff and Hogan</td>
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<td>(8) Evaluate &amp; select best strategic alternatives</td>
<td>Working document, to be incorporated in five-year plan</td>
<td>Task Force</td>
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<td>(9) Prepare written five-year strategic plan</td>
<td>ACRL STRATEGIC PLAN, 1986-1990</td>
<td>Task Force</td>
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<td>STEPS</td>
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<td>STRATEGY IMPLEMENTATION</td>
<td>RESPONSIBILITY</td>
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<td>(10) Implement the strategy</td>
<td>ACRL Planning Committee</td>
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<td>EVALUATION</td>
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<td>(11) Evaluate and update the plan, update annually or biennially</td>
<td>ACRL Planning Committee</td>
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<td>ADDITIONAL RECOMMENDATIONS</td>
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<td>(12) Revise the charge of the ACRL Planning Committee to place more emphasis on planning</td>
<td>Revised charge ACRL Planning Committee</td>
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C. Executive Summary of Goals, Objectives, and their Sources

This plan was developed by the ACRL Strategic Planning Task Force, using a number of key sources. These included the following:

1. The Activity Model for the 1990's.

Developed by a Committee appointed by President David Weber in 1980, the Activity Model was published in May, 1982. It provided the mission statement, goals, and objectives under which ACRL has since operated, and served as the basis for the present plan.


President Sharon Rogers carried out a survey of a random sample of ACRL members in the winter of 1984-85. Results indicated ten major areas of agreement on desirable activities.


Over 500 ACRL members attended the President's Program. They were asked to rank possible activities. The five top-ranked activities were: publications, continuing education, standards, liaisons, and chapters. They then brainstormed ideas on implementing these activities. Staff summarized these comments for the Task Force's use.


About thirty persons attended an open forum to discuss the draft mission, goals, subgoals, and objectives published in the December C&RL News. Their comments were incorporated into this Plan.


The Academic and Research Library Personnel Study Group was appointed to assess the adequacy of current programs and committee activities in light of ACRL's goals. They were to look specifically at: professional education, counseling, career development, status and perquisites, and similar aspects of staffing, careers, and personnel administration in academic and research librarianship. The Group made its final report in September, 1985 and the Task Force undertook to integrate the recommendations into the Plan.

6. Other.

Individual members wrote to the staff or the Task Force with recommendations. Suggestions with planning implications coming from committees and other units were also considered.
II. THE PLAN
GOAL BY GOAL SUMMARIES:

These summaries indicate for each goal all subgoals and objectives. Key objectives (of highest priority) are starred. Sources for the goals, subgoals, and objectives are summarized briefly, and some of our current activities in these areas are also briefly identified, to indicate the continuity of the plan with present and past association activities. It should be emphasized that the strategic plan indicates certain priorities, but that many regularly-occurring activities - not mentioned in the strategic plan will continue.

GOAL I. TO CONTRIBUTE TO THE TOTAL PROFESSIONAL DEVELOPMENT OF ACADEMIC AND RESEARCH LIBRARIANS.

Subgoal A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.

* Objective A1. Lower the cost to participate in ACRL professional development activities, as compared to 1984-85 levels.
* Objective A2. Expand the number of opportunities for academic and research librarians to participate in professional development activities at regional locations.
Objective A3. Increase financial support for section programs and projects.
Objective A4. Create an ongoing process for assessing educational needs and evaluating the success of ACRL professional development activities.
Objective A5. Coordinate ACRL CE program with those of related organizations.

Subgoal B. To promote a sense of professional identity and peer reinforcement among academic and research librarians.

Objective B1. Review the policies for establishing awards within ACRL.
Objective B2. Review the procedure for administering awards to ensure they are effectively providing a sense of professional identity and peer reinforcement.

Subgoal C. To provide career counseling and placement information regarding academic and research librarianship.

Objective C1. Promote timely and comprehensive information about professional positions available.

SOURCES FOR GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:

Goal I has remained unchanged in wording.
Subgoal A is the same as objective A.
Subgoal B is the same as objective E.
Subgoal C is the same as objective F.
2. Membership Survey:

69% of the respondents, 175 people, found the statement: "Continuing education programs should be encouraged and expanded in order to allow academic and research librarians to learn new skills and update competencies," very desirable. This was question #1.

52%, or 134 people, ranked as very desirable, question #7: "ACRL chapters should encourage a sense of professional identity and peer reinforcement so that those members unable to attend separate national conferences are not alienated."

3. President's Program:

Number two priority was assigned to this statement. "ACRL continuing education programs should be expanded so that academic/research librarians may learn new skills and keep old skills current."

The following ranked fifth:
"ACRL should support state and regional chapters in order to encourage a sense of professional identity and peer reinforcement."

In the brainstorming session, members stressed the lowering of costs to participate, the offering of courses at a regional level, alternate delivery systems, linking with other associations for continuing education efforts, and specific ideas for course content. They also suggested programming assistance for chapters, asked for increased chapter funding, indicated need for help to new chapters, and recommended improving communication with chapters.

4. Personnel Study Group Report:
Recommended coordinating continuing education programs with other associations.

CURRENT ACTIVITIES:

Continuing Education courses are being offered at Midwinter, Annual Conference, and at ACRL National Conferences.

ACRL's National Conferences offer learning opportunities.

Sections offer programs at ALA Annual Conferences; receive some ALA funding.

Funded Projects allow ACRL to present workshops, such as the Humanities Programming Workshops funded by NEH.

Awards now given include:

Academic/Research Librarian of the Year
Miriam Dudley BI Librarian of the Year
Oberly Award
Lazerow Award
ISI Doctoral Dissertation Fellowship
RBMS
WEISS/Nijhoff

A Placement Service is provided at Division National Conferences
GOAL II. TO ENHANCE THE CAPABILITY OF ACADEMIC AND RESEARCH LIBRARIES TO SERVE THE NEEDS OF USERS.

Subgoal A. To develop standards and guidelines.

* Objective A1. Develop guidelines for evaluating the performance and output of academic libraries.
* Objective A2. Increase dissemination of ACRL standards and guidelines throughout the higher education community.
* Objective A3. Increase librarians' understanding of the accreditation process and the role of the library in institutional accreditation.
* Objective A4. Increase the understanding of the statistics gathering process and the role of ACRL and other organizations in identifying, collecting and disseminating academic library statistics.

Subgoal B. To provide advisory services concerning academic and research libraries and librarianship.

Objective B1. Publicize availability of advisory services.

Subgoal C. To identify, explore, and act on problems and issues facing academic and research libraries.

Subgoal D. To encourage and evaluate innovation in library operations and services.

* Objective D1. Increase publicity about innovative activities.

Subgoal E. To strengthen libraries in Traditionally Black Institutions.

Objective D1. Assess the most effective way ACRL can assist these libraries.
Objective D2. Implement a program based on above assessment.

SOURCES FOR GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:

   Goal II is conceptually the same as Goal 2.
   Subgoal A is conceptually the same as Objective A.
   Subgoal B is conceptually the same as Objective B.
   Subgoal D is conceptually the same as Objective C.

2. Membership Survey:

   The following statements were rated very desirable by over 50% of the respondents:

   "ACRL needs to vigorously promote standards and guidelines for personnel, collections, references, etc." 53% (133 people)
   "ACRL should strengthen and better publicize its advisory services that are provided to libraries and academic institutions." 53% (130)
3. President's Program:

Standards were ranked third; advisory services eighth.

Brainstorming highlights included: suggestion of closer work with accreditation agencies; request for more publicizing of standards; more coordination; identification of areas needing guidelines or standards; help in implementation.

4. Open Forum:

- Asked for aid to libraries in providing service to users
- Asked for more on improving access to information
- Asked for greater impact on the accreditation process
- Asked for the inclusion of statistics.

5. Personnel Study Group Report:

No specific recommendations.

6. Other:

No specific recommendations.

GOAL III. TO PROMOTE AND SPEAK FOR THE INTERESTS OF ACADEMIC AND RESEARCH LIBRARIANSHIP.

Subgoal A. To enhance awareness of the role of academic and research libraries among non-library professionals and organizations (e.g., accrediting bodies, higher education associations, scholarly and professional societies) and to develop effective working relationships with them.

* Objective A1. Create opportunities for academic librarians to interact with other professionals in the academic community.

Objective A2. Develop new alliances with other professional organizations.

Objective A3. Develop materials library staff can use to enhance administrators' understanding of academic libraries.

Subgoal B. To monitor and speak out on government and private sector activities likely to affect academic and research librarianship, including legislation, and fiscal and political support at all levels.

* Objective B1. Establish ACRL as the association with the authority to speak for the academic library profession on issues of importance to higher education and academic libraries.

* Objective B2. Strengthen membership efforts to affect and influence government and private sector activities, including legislation, funding, and quality higher education.

Objective B3. Provide assistance for librarians seeking additional fiscal support for their libraries.
Subgoal C. To support and participate in the recruitment of outstanding persons to the field of academic and research librarianship.

Objective C1. Develop mechanisms to attract high quality candidates.
Objective C2. Support the recruitment of members of underrepresented groups to academic librarianship.
Objective C3. Promote the adoption of personnel policies that enhance the status, professional development, and working conditions of academic librarians.

Subgoal D. To help shape library education programs in accord with the needs of academic and research librarianship.

Objective D1. Develop an action plan describing how library schools might address academic/research library needs.

SOURCES:

1. Activity Model:

   Goal statement is exactly the same.
   Subgoal A is similar to Objective B; Subgoal B is similar to Objective F;
   Subgoal C is similar to Objective C; Subgoal D is the same as Objective D.

2. Membership Survey:

   These statements were rated very desirable:

   "Fiscal and political support (including support of appropriate legislation) for academic and research librarians needs to be strengthened." 59% (146)

   "ACRL should strive to increase public awareness of the role of academic and research libraries." 60% (150 people)

   "Awareness of the role of academic and research libraries should be enhanced by ACRL among such groups as scholarly and professional organizations." 60% (150 people)

   "ACRL should monitor and help shape library needs of academic and research librarianship." 50% (123 people)

   "ACRL should take a more active role in speaking out on government activities of potential impact upon academic and research librarianship." 52% (130)

   "[ACRL should] strengthen alliances with other professional and scholarly organizations" (e.g., the AAAS, ACE, etc.) 53% (133 people)

   "[ACRL should] encourage ACRL members to attend meetings of other professional associations." 50% (126 people)
GOAL IV. TO PROMOTE STUDY, RESEARCH & PUBLICATION RELEVANT TO ACADEMIC AND
RESEARCH LIBRARIANSHIP.

Subgoal A. To identify study and research topics & to encourage improvement in research skills.

* Objective A1. Develop research priorities regarding academic libraries and their role in higher education.
Objective A2. Develop incentives or programs to encourage librarians to engage in research.

Subgoal B. To support research projects, report works in progress and disseminate research results.

* Objective B1. Seek grant funds for the creation of research awards and for carrying out research projects.

Subgoal C. To advance the professional knowledge of academic librarians through an effective publishing program.

Objective C1. Explore electronic publishing possibilities for ACRL publications.
* Objective C2. Review the ACRL publications program to ensure that it supports Association mission, goals, and objectives.

SOURCES OF GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:
   
   Goal IV is similar to Goal 4
   Subgoal A is similar to Objective C
   Subgoal D is similar to Objective A

2. Membership Survey:

   The following statements received high agreement on desirability:

   "Publications (e.g., C.E. syllabi, conference proceedings, books, journals) should continue to be sponsored by ACRL." 56% (142 people)

   "Research leaves for academic and research librarians should be encouraged." 63% (161 people)

3. President's Program:

   Ranking: Publications ranked #1.

   Brainstorming:

   Participants encouraged paid research leaves for librarians, suggested grant funding for research, suggested electronic publishing, and supported a review of the publishing program.

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4. Open Forum:

Suggested **Choice, BCL III** be here, rather than in Goal II.

5. Personnel Study Group Report:

No specific recommendations.

6. Other:

Members at Research Clinic and Research Development Committee recommended publishing a manual on research.
Goal: I. To contribute

Subgoal

A. To sponsor and encourage opportunities for academic and research
Goal: I. To contribute

Subgoal

A. To sponsor and encourage opportunities in academic and research
Goal: I. To contribute

Subgoal

A. To sponsor and encourage opportunities for academic and research librarians to update
Goal: I. To contribute

Subgoal

A. To sponsor and engage opportunities for academic and research
Goal: I. To contribute

Subgoal

B. To promote a sense of professional identity
Goal: II. To enhance

Subgoal

A. To develop standard and guidelines.
Goal: II. To enhance

Subgoal

A. To develop standard and guidelines.
Goal: II. To enhance

Subgoal

C. To identify, explore, and act on problems and issues facing academic and research librarians.

D. To encourage and ev...
Goal: III. To promote

Subgoal

A. To enhance awareness of the role of academic and research libraries among non-lib
Goal: III. To promote

Subgoal

B. To monitor and set aside on government/private sector activities likely to
### ACRL STRATEGIC PLAN

#### I. To promote and speak for the interests of academic and research librarianship.

<table>
<thead>
<tr>
<th>Subgoal</th>
<th>Objective</th>
<th>Strategies</th>
<th>Responsibility</th>
<th>Resources</th>
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<tr>
<td>B3.</td>
<td>Strengthen effective membership efforts to affect and influence government and private sector activities, including legislation, funding, and the quality of higher education.</td>
<td><em>A</em> Collect and publicize examples of grant applications and budget proposals from successful libraries.</td>
<td><em>Any member submit, staff collect and store, publicize</em></td>
<td><em>Volunteer time</em></td>
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<td><em>B</em> Cooperate with LAMA or another group in presenting a fundraising workshop.</td>
<td><em>ACRL and LAMA staff</em></td>
<td><em>Staff time</em></td>
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<td>C1.</td>
<td>Develop mechanisms to attract outstanding candidates to academic and research librarianship.</td>
<td><em>A</em> Prepare one recruitment brochure per year for a targeted audience such as library schools, undergraduates, paraprofessionals and high school and college counselors</td>
<td><em>Membership Comm. prepare brochures, staff produce and distribute</em></td>
<td><em>Volunteer time</em></td>
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*Highlighted objectives were identified as priority areas.*  

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III. To promote and speak for the interests of academic and research librarianship.

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<th>Subgoal</th>
<th>Objective</th>
<th>Strategies</th>
<th>Responsibility</th>
<th>Resources</th>
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<tr>
<td>C1.</td>
<td>Develop mechanisms to attract outstanding candidates to academic and research librarianship.</td>
<td>b. Encourage local chapters to develop recruiting programs aimed at high school and college students.</td>
<td>Chapters Council adopt</td>
<td>Volunteer time, Possible for development of model.</td>
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<td>c. Target research on the relationship of personnel standards to the recruitment, development, and retention of librarians.</td>
<td>Research Comm.</td>
<td>Volunteer time</td>
</tr>
<tr>
<td>C2.</td>
<td>Support the recruitment of members of underrepresented groups to academic librarianship.</td>
<td>a. Offer scholarships.</td>
<td>Staff investigate cost, Staff prepare and distribute publicity, Board create comm., Comm. select</td>
<td>$, Consultant, Staff time</td>
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<td>b. Identify and cooperate with other organization pursuing the recruitment of minorities.</td>
<td>Prof. Assoc. Liaison Comm., Personnel Officers Discussion Group, Staff identify others, Promote in C&amp;RL News</td>
<td>Staff time, Volunteer time</td>
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<td>c. Encourage libraries to hire minority student workers.</td>
<td>Promote in C&amp;RL News, etc.</td>
<td>Staff time</td>
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Submitted objectives were identified as priority areas.

10/24
Goal: III. To promote

Subgoal

C. To support and participate in the recruitment and retention of promising persons in the field of science.
Goal: III. To promote

Subgoal

D. To help shape 12 education programs accord with the
Goal: IV. To promote

Subgoal

A. To identify research topics and to encourage improvement in research skills.
Goal: IV. To promote

Subgoal

C. To advance the professional knowledge of academic librarians through an effective...
GOALS
Contribute to professional development 19-23
Enhance capability to serve needs of users 24-26

SUBGOALS
Advance professional knowledge through publishing 33, 34
Develop effective working relationships with non-library professionals, organizations 26, 27
Develop standards, guidelines 24, 25
Encourage, evaluate operations, services innovations 26
Enhance awareness among non-library professionals, organizations 26, 27
Help shape library education programs 32
Identify, explore, act on problems, issues 26
Identify research topics, encourage improvement in skills 32, 33

OBJECTIVES
Assess effective way to assist libraries serving minorities 26
Create opportunities for professional interaction 26, 27
Create process for assessing needs, evaluating professional development activities 22
Coordinate CE programs with related organizations 22
Develop action plan for library schools to address changing needs 32
Develop alliances with professional organizations 27
Develop guidelines for evaluating performance, output of libraries 24
Develop incentives, programs to encourage research 32, 33
Develop materials to enhance administrators' understanding of libraries 27
Develop mechanisms to attract high-quality candidates 29, 30
Develop research priorities 32
Establish ACRL's authority for academic library profession 28
Expand opportunities to participate 20
Explore electronic publishing possibilities 33, 34
Implement program to assist libraries serving minorities 26

STRATEGIES
Analyze economics of online positions-available database 23
Approach potential donors 33
Assess need to re-establish 50-state legislative network 28
Assist in preparing AAHE publication on searches for positions 27
Carry out cost/benefit study 34
Collect, publicize examples of grant applications, budget proposals 29
Collect, publish personnel policies 31

Monitor, speak out on government, private sector activities 28, 29
Promote professional identity, peer reinforcement 22, 23
Provide advisory services 25
Provide career counseling, placement information 23
Sponsor, encourage opportunities for updating, learning, gaining awareness 19-22
Strengthen libraries serving minorities 26
Support, participate in recruitment, retention 29-31
Support research 33

Increase dissemination of ACRL standards, guidelines 24
Increase financial support for section programs 21
Increase understanding of accreditation process 24, 25
Lower cost to participate 19
Promote adoption of personnel policies to enhance status, development, working conditions 31
Promote identification, collection, dissemination of statistics 25
Promote information about positions available 23
Provide assistance for librarians seeking additional fiscal support 29
Publicize Advisory Services 25
Publish Choice and CLC regularly 34
Review ACRL Publications Program 34
Review policies for awards 22
Review procedure for administering awards 22, 23
Seek grant funds for research 33
Strengthen efforts to affect, influence government, private sector activities 28, 29
Support recruitment of members of underrepresented groups 30, 31
Use programs, publications to identify issues, problems 26

Commission paper on topic from list of priorities 32
Compare ACRL, ALA awards 22
Consider establishing ACRL awards banquet 23
Contact outside funding sources 19
Continue reports in CRN News on successful innovations 26
Cooperate in presenting fund-raising workshop 29
Coordinate statistics efforts with outside agencies 25
Create advisory group from minority members 31
Create checklist of ongoing legislation 29
STRATEGIES (cont’d.)

Create packet of materials on how to influence legislators 28
Create Sections Programming Fund 21
Decide on implementation mechanism for awards 22
Develop accreditation package for regional accreditations 24
Develop, administer national needs assessment every five years 22
Develop, publish background paper on statistics gathering process 25
Develop, submit funding proposal 19
Disseminate personnel policies, practices 31
Distribute new ACRL standards 24
Encourage chapters to participate in activities emphasizing career choices 31
Encourage chapters to use Chapters’ Special Programming funds to support members’ research 33
Encourage hiring of minority student workers 30
Encourage local chapters to develop recruiting programs 30
Encourage paid research leaves 32
Encourage units to identify innovation in their areas 26
Establish links for cooperative professional development 22
Establish or create resource files 28
Get ALA approval for fundraising 33
Hold national conference every 3 years 20
Hold workshop to gather advice on libraries serving minorities 26
Identify appropriate technology for publication 33
Identify, cooperate in recruitment of minorities 30
Increase funding for Chapters’ Special Programming Fund 20
Investigate exchange programs among North African college librarians 23
Make, implement decision on electronic publishing 34
Monitor government activity in statistics 25
Offer CE course via alternative mode 20
Offer Research Clinic 33
Offer discounted conference fees to other associations 27
Offer discounts for CE courses 19
Offer new workshop, institute, symposium 19
Offer scholarships 19, 30
Partially subsidize one preconference for section which has not had one 21
Partially subsidize publication of bibliography unable to attract commercial publisher 21
Participate in national statistics decisions 25
Play role in defining commonly used data elements in academic library statistics 25
Prepare ACRL Publishing Plan 34
Prepare, present one new regional/local program 20
Prepare list of ACRL publications 34
Prepare packets of materials for work with deans, provosts, presidents, trustees 27
Prepare recruitment brochure 29
Present ACRL Publications List, Plan to Board 34
Provide financial support for presentations at non-library meetings 27
Provide forum for research in progress 33
Provide funds to implement recommendations of Task Force on Performance Measures 24
Provide material on evaluating academic library 25
Provide placement service at Division national conferences 23
Publicize ACRL Research Committee list of priorities 32
Publish article by non-librarian in ACRL journal 26
Report on Advisory questions, failures 25
Review report of Task Force on Library Education, adopt recommendations 32
Sponsor 2 forums with papers by non-librarians 27
Sponsor joint programs with other associations 26
Target STS, CJCLS, CLS for special development 21
Target research on relationship of personnel standards to recruitment 30
Target research on women, minorities in librarianship 31
Target six associations per year, set up joint activity 27
Work with ARL to improve library school curricula 32
Write articles, announcements on ACRL standards for non-library publications 24
Write proposals for research projects 33
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<tr>
<td>Symposium</td>
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<td>Task Force on Library Education Report</td>
<td>32(D1a)</td>
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<td>Task Force on Performance Measures</td>
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<td>30(C2), 31(C2)</td>
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ACRL Board
- (19) IA1a; IA1c; IA1d Choice staff
- (20) IA2a
- (21) IB1b
- (22) IB1b; IC1b; IC1c Committees
- (23) IB2b; IC1b; IC1c
- (24) IA1a; IA2a
- (25) IA3b
- (26) IE1a; IA1a
- (27) II1A1c; II1A3b
- (28) II1C2a
- (29) II1C2b
- (30) II1C2c
- (31) II1C2d
- (32) II1D1a
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ALA staff member
- (23) IC1a

ALA Washington Office
- (28) II1B2a; II1B2b
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Academic Library Statistics Committee
- (25) IA4a; IA4b; IA4c; IA4d; IA4e A1a; A1c; A1d

Academic Status Committee
- (31) II1C3a

Activity Sections Council
- (21) IA3a

Anderson, D. (consultant)
- (33) IV1A2c

Awards Committee
- (22) IB1b; IB2a
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BCL (Books for College Libraries) staff
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Budget and Finance Committee
- (19) IA1c
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- (20) IA2a
- (30) II1C1b
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- (20) IA2d
- (22) IA4a
- (23) IC1b; IC1c
- (24) II1A5a
- (25) II1A3b
- (28) II1B1a
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Editorial Board
- (31) II1C3b
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Education committees, sections
- (22) IA5a

Executive committees
- (21) IA3a; IA3b

Executive Director
- (27) II1A2a

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- (32) II1D1b

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- (26) II1A1b

LAMA staff
- (29) II1B3b

Legislation Committee (ALA)
- (28) II1B2a

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- (28) II1B2a; II1B2b

Members/member units
- (19) IA1b
- (29) II1A2b
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Professional Education Committee: (19) IA1aj, IA1b; IA1c
(20) IA2c
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Program Committee: (20) IA2b

Publications Committee: (21) IA3d
(34) IVC1c; IVC2b

Research Committee: (30) IIC1c
(31) IIC2f
(32) IVA1aj; IVA1bj; IVA2a
(33) IVA2bj; IVA2dj; IVB1a

STS (Science & Technology Section): (21) IA3b

Sections: (19) IA1d
(21) IA3c; IA3d
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(20) IA2aj; IA2bj; IA2cj; IA2d
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Standards and Accreditation Committee: (24) IIA1aj; IIA2aj; IIA3a

Task force: (25) IIA3b

(ULS) University Libraries Section: (27) IIA3a

Vendors: (33) IVC1a
C. STRATEGIC MANAGEMENT DIRECTIONS

The achievement of the goals, subgoals, and objectives included in this plan depends on the existence of a stable and well-managed association. ACRL's strategic directions over the five years encompassed by this strategic plan include:

1. Positioning ACRL as the most significant American association of academic and research libraries, librarians, and librarianship: the association which represents them, speaks for them, asserts their interests, and assists them in reaching their goals.

2. Managing the financial resources of ACRL by relying on sound budgeting and accounting principles; including the building and maintaining of a reserve fund equal to at least 50 percent of the average annual expenditures over the three most recently completed years.*

3. Maintaining a dedicated and competent staff by depending on sound personnel practices, including careful selection, adequate training, participative management techniques, and opportunities for professional development.

4. Seeking new members through a variety of recruitment techniques, while extending efforts to retain present members, including regular assessments of member needs.

5. Supporting all elected and appointed officers in fulfilling their leadership roles, through carefully prepared programs of orientation and staff personal attention.

6. Working collaboratively with other ALA units for the good of librarianship as a whole.

7. Providing a Headquarters office as a communications center, information resource, and central meeting and work place.

*The American Society of Association Executives recommends a reserve of one year's operating expenses. ALA is moving in this direction.
A. Implementation: An Overview

Implementation

Once the ACRL Board has approved the five-year plan, the Board will forward it to the Planning Committee and instruct the Committee to implement it. The charge of the Planning Committee was recently revised so that one of its primary responsibilities is now to implement, evaluate, and revise the Association's strategic plan. In the plan, the highest priority or critical objectives have been starred. This designation of high priority objectives will be helpful in the implementation process. The report also includes a timeline targeting a specific year for the implementation of each critical objective.

Evaluation and Revision

The Planning Committee is also responsible for the evaluation process, which means evaluating progress towards stated goals, objectives, and strategies in the plan. Within this hierarchy, the objectives and strategies are the levels which are the most specific and measurable. The Planning Committee will need to develop a schedule to evaluate, revise and extend the plan on a cyclical basis. The most desirable time frame for ACRL's plan is an important issue in terms of extension. This first plan covers five years, but because of the difficulties of projecting the future very far in advance, there are advantages to mid-range strategic plans which cover three years. The process of implementation will help to determine if five years is the most effective and manageable time frame for ACRL's plan.

Involvement of key units

There are other units and key individuals who play an important role in the planning process. The Executive Director participates in developing the strategic plan as an ex officio member of the Planning Committee. With her staff, she also drafts an annual operating plan which proposes an action plan for each strategy targeted for the year. These action plans identify needed resources and point out fiscal implications.

The Executive Director is also an ex officio member of the Budget and Finance Committee and serves as a link between the planning and budgeting processes. The Budget and Finance Committee deals with the fiscal implications of objectives and strategies. The budget is prepared based on the annual operating plan, which is reviewed in draft form by the Budget and Finance Committee. As a result of this process, the budget recommended by the Committee to the Board of Directors reflects the priorities identified in the strategic plan.

The Challenges Ahead

In summary, the success of a structured planning process depends upon the involvement and coordination of a number of ACRL units. During the development of the strategic plan, two issues were raised which are beyond the scope of the Task Force or any single unit and which the Board of Directors may wish to consider. The first issue is the ongoing need to coordinate ACRL planning with ALA planning and to explore how the implementation of ACRL's plan will mesh with ALA planning activities.
The second issue is how to evaluate the effectiveness of the strategic plan as a whole in terms of carrying out ACRL's mission. This evaluation issue is different from the Planning Committee's responsibility to measure progress towards individual goals and objectives. According to planner Wayne Lemburg the ideal strategic plan "...provides a unifying identity, sense of purpose, philosophy, and direction to an organization" (Wayne A. Lemburg, "Charting the Future through Strategic Planning," Association Management, October 1980, p. 152). As ACRL's plan is implemented, its leaders will want to find a means of evaluating it with this ideal in mind.
Objective

I.A.I.

Lower cost to participate in ACRL professional
Objective

I.B.2.

Review awards procedures
Objective

II. B. 1.
Publicize Advisory Services
Objective

III. B. 1.

Establish ACRL as the association with authority
Objective

III. D. I.
Develop action plan for library school assistance
C. Recommended changes to ACRL's Financial Policies Implicit in the Plan

It is important to note that the Plan implies certain financial policy changes, and that the Plan can only be adopted in full if these changes are made. The Task Force therefore calls these to the attention of the ACRL Board:

1. Reserve funds are used:
   - to increase support to sections
     * where targeted
     * through a special programming fund
     * through pre-Conferences
   - to increase support to chapters
     * through the special programming fund
   - to make continuing education more accessible
   - to publish certain items
   - to distribute standards free of charge
   - to recruit members of underrepresented groups (scholarships)
   - to develop incentive programs to encourage librarians to do research

2. Grant funds are used to:
   - help support desired programs
   - carry out special projects

3. Dues revenue supports services for all members, including:
   - recruitment and retention activities
   - committees
   - sections
   - chapters
   - discussion groups
   - advisory services
   - research and statistics projects
   - Jobline
   - some programs at Annual Conference

4. These are self-supporting:
   - serial publications
   - non-serial publications, with special exceptions
   - continuing education, with special exceptions
   - National Conferences
   - Pre-Conferences, with special exceptions
D. Development of the Annual Operating Plan

This is the proposed process for the development of an annual operating plan by staff and its approval by the Board. To add years to the Strategic Plan, another, separate process, dominated by member contributions, will be devised by the ACRL Planning Committee.

July
ACRL Budget & Finance, Planning, and Board of Directors approve mission, goals, and objectives for upcoming year.

August
Staff retreat - 1/2 day - to consider the following year (not the one beginning the next month, but the one after that) using the timelines in the Strategic Plan as a guide. Action planning takes place in broad terms.

September
During orientation of Vice-President/President Elect, planning process is described.

October
Executive Committee reviews draft action plan.

November
Staff drafts annual plan.

December
Staff drafts budget, based on annual plan draft. Budget distributed to Budget & Finance; annual plan draft goes to B&F, Planning, and Board.

January
At Midwinter, draft is discussed. Tie-in with budget is kept in mind.

Budget & Finance, Planning report to Board regarding their reactions, modifications of draft annual plan.

Staff works on modifications suggested at Midwinter, revises plan and budget.

February
Staff presents draft budget to ALA COPES.

April
Revised plan considered by ACRL Executive Committee.

May
Any additional revisions made.

June
Plan distributed

July
Approval by Board on recommendation of Executive Committee and Budget & Finance.
SUGGESTED FORMAT FOR ANNUAL PLAN

I. Mission Statement

II. Goals

III. Subgoals

IV. Objectives

V. Critical Objectives

VI. Strategies

VII. Action plan for each strategy targeted for the year
     Clearly indicates deadlines, person(s) responsible, resources needed

VIII. Budget as an expression of this plan
E. Dissemination

Decisions about disseminating this plan will be made by the ACRL Board of Directors. The Task Force would like to make the following suggestions.

1. A complete copy of the Plan, as here presented, be deposited in the ERIC system.

2. An eye-catching printed brochure be prepared for broad distribution. This would briefly describe the planning process; would include mission, goals, and objectives; summarize the background papers and identify strategic management directions.

3. An article be prepared for C&RL News.
APPENDIX A  MEMBER NEEDS REPORT

I. Membership Profile and Key Statistics

Table MNI contains some information about ACRL members and other academic librarians. Although there are more women than men among ACRL members, the proportion is lower than in the library profession as a whole. Members tend to have degrees in addition to their library masters; more typically a second masters degree, but --- in increasing numbers --- the Ph.D. Compared to other divisions of ALA, ACRL has a higher percentage of the total number of its target market in its membership. About 15% of the members attend national conferences of the Association. 69% of the members have belonged to ACRL for less than 10 years, 46% for less than 5. The typical member is in her thirties, works in public services in an ARL library, and has participated somewhat in ACRL activities. ACRL has about 8000 personal members and 1000 institutional members. This means that about 35% of all academic librarians belong to ACRL and about 32% of all academic libraries belong to ACRL.

Table MNI2 shows a five-year history of division membership. Table MN3, the most current division membership figures, with comparisons to last year; Figure MNI shows a bar graph of division membership history, and Table GN2, ACRL personal membership by state.

ACRL members are also good attenders at ALA Annual and Midwinter conferences. In every case, from the Philadelphia conference in 1982, through the Dallas conference in 1984, a greater percentage of the attendees were ACRL members than are represented in ALA as a whole. In Philadelphia, 28.9% of the attendees were ACRL members; at the time only 25.9% of ALA members were ACRL members. In Los Angeles, these figures were 30.6 and 20.6; in Dallas, 29.8 and 21.2, and in Chicago, 29.3 and 23.2.

II. Member Needs Survey and President's Program

In the fall of 1984, a survey was distributed to a random sample of 600 ACRL members. A copy of the survey, with all responses included, is appended. (Attachment MN1)

At the Chicago Conference, 1985, members had the opportunity to participate in the gathering of information for the needs survey. They were asked to rank the ten items of highest agreement from the survey results in priority order and to discuss the means of accomplishing these goals. Figure MNI shows the statements; Figure MN3 indicates the rankings. Table MNI6 is a content analysis of the discussion.

III. Personnel Study Group Report Summary

The ACRL Academic and Research Library Personnel Study Group, which had broadly representative membership, reviewed aspects of ACRL's mission, goals, and objectives, dealing with personnel. It concluded that ACRL was not in a strong position to address upcoming personnel issues, commissioned a paper by Alan Veaner, and presented a report with recommendations in the areas of External Relationships (intensify efforts to work academic constituencies); Professional Standards and Research (on personnel standards); Staff Development; Education (graduate and continuing); and Recruitment (in general, and of minorities). The recommendations have been included in the Plan.

JSS 86 0505
### Table MNI

**ACRL Membership Characteristics**

<table>
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<th>Rogers</th>
<th>King</th>
<th>Anderson</th>
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1. Sharon Rogers' Questionnaire for President's Program, 261 respondents.
2. King Research reported 1982
4. Back of ALA membership form.
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<th>ALA Membership Form</th>
<th>Other ACRL Stats.</th>
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<td>20.9%</td>
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<td>26.0%</td>
<td>26.0%</td>
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* of those who belong to chapters.
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### Personals - New

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### Personals - Renewals

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### Organization - New

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### Organization - Renewals

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### Grand Total

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**TOTAL # PARTICIPANTS** = 952
**TOTAL # COURSES PRESENTED** = 60
952 - 60 = 892
**AVG. # PARTICIPANTS/COURSES** = 16
Registration Figures, ACRL CE Courses
ALA Annual Conference 1981 Through ALA Annual Conference 1986

**Mid Winter 1986-Chicago**

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**ALA Nat'l Conf. 1986-Baltimore**

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**ALA Annual 1986-New York**

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**Total # Participants** = 1,202
**Total # Courses Presented** = 81
**Average of 15 Participants/Course**
51 tables each discussed the five top priority association activities. Ideas were grouped together to clarify trends.

### I. PUBLICATIONS

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### Liaison-related
- Piggyback on faculty associated publications
- Encourage ACRL members to publish in other journals and fields
- Recognize members' publications in C&RL News

### Maintain, continue publications
- Keep up the good work
- Keep all we have
- Continue the excellent job

### Monographs
- Publish more
- More small monographs on specific, narrow topics
- "Occasional papers" on specific issues
- Solicit scholarly publications in diverse areas
- Annotated bibliographies on specific topics
- Conference proceedings of small conferences
- Specific kits/manuals on workshops
- Operating manuals for cost accounting, performance measures, strategic planning
- ACRL handbook
- Too expensive
- Do a survey to further develop themes rising from C&RL
- Make something like specific kits for different size libraries

### Books for College Libraries
- Update more frequently
- Publish supplements
- Publish online

### Conference Proceedings
- Continue free to attendees, especially printed
- Publish as soon as possible
- Allow longer lead time for juried conference papers
- Improve quality
- Index them
- On microfiche with hard copy abstracts
1. PUBLICATIONS cont'd

<table>
<thead>
<tr>
<th>Prizes</th>
<th>Promotion &amp; Marketing</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>offer for excellence in publishing</td>
<td>emphasize quality</td>
<td>use qualified reviewers, referee</td>
</tr>
<tr>
<td>to attract better manuscripts</td>
<td>use qualified reviewers, referee</td>
<td>use outside readers for critique of methodology</td>
</tr>
<tr>
<td>to authors</td>
<td>make purchase simpler: accept purchase order vs. cash w/order</td>
<td>monitor calibre</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maintain high standards</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maintain good educational staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>improve editing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>edit statistics articles better (tables)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>attract better manuscripts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>offer better manuscripts</td>
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<tr>
<td></td>
<td></td>
<td>improve quality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>increase quality of screening process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>improve quality of conference proceedings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>continue to upgrade quality of existing publications</td>
</tr>
</tbody>
</table>

Encourage Research & Publication

| awards                                                      | recognition in CAR NEWS even if not library-related        | encourage first time authors                                            |
|                                                            |                                                            | promote adequate research leave                                          |
|                                                            |                                                            | support                                                                  |
|                                                            |                                                            | grants-in-aid                                                            |
I. PUBLICATIONS cont'd

Encourage Research & Publication (cont'd)

encourage publication by ACRL members
in collegial journals
funding for
research funds for writing
special column for new researchers
tie in with continuing education
assist librarians to produce better
articles, research, etc.

Serials

do not proliferate
don't change titles
do not need RBML
mix of research, how-to & how-not-to;
practical & research
less emphasis on statistics
more opinion - philosophy
cross - divisional news & publications
use caution in establishing new ones
give jobs top support even when $ tight
tie in with continuing education
book reviews late
online publication of FJLS, Choice

C&RL

increase size or frequency	heme issues
give authors feedback
include collection on CJCL's
greater currency
too many articles by Library school
faculty - they're not on front line
more practical articles to even it up
analyze value: do a qualitative survey
is there a sufficient number of pro-
spect articles?
most important publication, with Choice
bigger print

C&RL News

expand
disseminate preliminary results of
ongoing research
use for surveys
column on grant availability
continue and strengthen research notes
abstract section newsletter highlights here
<table>
<thead>
<tr>
<th>Publication</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>C&amp;RL News (cont'd)</td>
<td>Consider the expanding role of C&amp;RLN, report chapter activities</td>
</tr>
<tr>
<td>Choice</td>
<td>Improve timeliness—especially science, run full-fledged reviews of non-print materials, foreign language coverage, signed reviews good, editorial control improved, with C&amp;RL, most important of our pubs.</td>
</tr>
<tr>
<td>Newsletters</td>
<td>Continue, encourage, so they keep on, do in clusters of sections w/overlap in interest for discussion groups, enlarge to allow publication of substantial articles, section &quot;jobs&quot; should have more support, abstract highlights in C&amp;RL News, review funding priorities</td>
</tr>
<tr>
<td>RBML</td>
<td>Don't need, good, avoid proliferation of narrow subject specialties like rare books</td>
</tr>
<tr>
<td>FJLS</td>
<td>Have online via ALANET</td>
</tr>
<tr>
<td>Timeliness</td>
<td>Improve—especially Choice, speed up production, make C&amp;RL more current, evaluate publication dates routinely, book reviews late</td>
</tr>
</tbody>
</table>
I. PUBLICATION cont'd

Miscellaneous/specific ideas
develop publications for faculty 1
use to develop awareness regarding advisory services 2
solicit more articles 1
use electronic publication 3
current contents service 1
use to let members know what services are available & guidelines 1
expand ALANET 1

II. STANDARDS

Accrediting agencies
promote cooperation among 1
link with them 8
spend money on this? 1
librarians on teams 5
lobby more aggressively 2
promote to them 4
develop cooperatively with 1
get them to incorporate ours in theirs 6
get them to take us seriously 1
input from them 1
endorsement by 1
do papers at their meetings? 1
maintain & make available a list of "excellent libraries" for 1

Coordination
coordination of standards 3
with other ALA units 2
with other schools & professional organizations; 4
ARL especially 1
with groups that carry weight with administration 1
endorsement by others 1

Develop standards/Guidelines for:
2 year colleges 1
library education for academic librarians 3
units establish in their areas of expertise 3
continuing education 2
cost accounting standards 1
research leave (prof. devel.) 1
Machine Readable Files 1
### II. STANDARDS cont'd

#### Member input

- hearings: seek broadly
- committees
- needs survey
- representatives of sections

#### Miscellaneous

- mention library standards in university catalogs
- make more specific
- make stronger and supportive
- "atmosphere & secondary use be evaluated"
- be sure all ACRL interests represented
- "academic" (preferred) vs. "faculty" status
- locate standards for members
- need quantitative standards

#### Promotion

- publicize successes
- publicize with administrators
- publicize outside library community
- article in Chronicle of Higher Education
- give speeches regarding standards
- publicize with legislators
- publicize availability
- course on importance of

#### Publication of

- put all together and disseminate as a group
- on floppies, microfiche
- free
- more frequently in C&RL News

#### Purposes of

- upgrade quality of service for all libraries
- give everybody a goal
- should be achievable; not impossibly high
- useful

#### Research

- to establish norms:
- base standards on these
- explore different approaches to measurement
- to define what's minimal and what is optimal
Develop Standards/Guidelines for: (cont'd)

- planning process 2
- needs assessment tools 1
- priority setting 1
- A/V & software 1
- performance evaluation 3
- for these five priority items 1
- extended campus services 1
- output measures 3
- Bibliographic Instruction 1
- collection development (incorporate new technology)
  - salaries
  - volume counts
  - service
  - terminology
  - educational requirements 3
  - new technology 1
  - professional: non-professional ratio 1
  - staffing criteria 2
  - university level: quantitative standards
  - specific disciplines
  - branch campuses
  - comparable worth 2
  
Enforcement

- concentrate on areas not now covered 1
- there are too many; take care in choosing new areas 1
- present activities fine 1
- more would be counter-productive 1

Implementation

- publicize where successful
- program at a conference on how standards are implemented
- encourage ARL directors to apply them
- offer consultant/facilitators to help instructors revise & discuss
- course on how to use with administration
- “tip sheet how to use”
- guidelines on strategies for
- survey present status
- find out how librarians use

46
3

1
1
1
1
1
1
4

1
2
1
1
5
2
2

17
III. LIASIONS cont'd

"Infiltrate" other organizations (cont'd)

more communication with faculty members' associations
1
encourage our members to give papers at other meetings
1
reach out to others
1
send our publications, brochures, etc. to others
1
offer workshops at others' conferences to explain library importance to field
1

Financial Assistance

courage academic libraries to support staff travel to other meetings
3
provide money for staff to attend and work with other associations
1
encourage ACRL members (thru funding) to join other professional associations
2
provide money for members to attend other conferences
2
stipend for best paper in non-library journal
1
seek joint grant support
1
subsidize joint membership
1
re-fund BI Liaison
1
fund having experts in targeted organizations participate in ACRL programs
2

Cooperative activities with other organizations

negotiate for reduced and special joint membership fees
3
publish bibliographies in others' publications
1
form coalitions on specific topics
1
hold meetings back to back
1
seek joint goals
1
have ACRL President make overture to other presidents regarding working together - common interest
1
approach others for joint workshops and conferences
1
formal liaisons
1
(multi-year)
1
joint liaisons
1
discipline - based liaison
2
offer assistance with computerization and index production
1
negotiate regarding institutional pricing of journals - or exchange of journals at member prices
1
joint C.E., instructors, pre-conferences
3
II. STANDARDS cont'd

Updating

<table>
<thead>
<tr>
<th>Task</th>
<th>Frequency</th>
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<tbody>
<tr>
<td>reassess regularly</td>
<td>1</td>
</tr>
<tr>
<td>schedule revisions</td>
<td>9</td>
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<tr>
<td>evaluate</td>
<td>2</td>
</tr>
<tr>
<td>more frequently</td>
<td>1</td>
</tr>
</tbody>
</table>

III. LIAISONS

Government Liaisons

- Lobbying for academic library needs
- Fund travel of ACRL members to professional meetings to discuss financial/political impact of federal legislation on libraries
- More diplomatic contacts

Open ACRL to others

- Encourage faculty to publish in library journals; solicit papers
- Invite faculty to speak at ACRL conferences
- Invite reps from other disciplines and organizations to ACRL conferences as speakers, discussion leaders
- Sell ourselves
- More communication with faculty
- Encourage organizational memberships by other organizations
- Develop "affiliate organizational" membership

"Infiltrate" other organizations

- Encourage poster sessions by librarians at other meetings
- Exhibit at other meetings
- Send formal ACRL reps to other meetings
- Get institutional membership in other organizations
- Encourage our members to join and be active in other organizations
- Encourage our members to publish in other journals
- Make high level initial contacts
- Identify their goals and give better service
- Identify appropriate committees there, or help establish
- Supply speakers and consultants to other organizations, especially officers
Cooperative activities with other organizations (cont'd)

- joint committees
- joint articles and publications
- joint conferences

Specific organizations for liaisons

- AAUP
- ARLIS
- College Art Association
- MLA
- AACJC
- AAC
- AAHE
- AALL
- American Association of Historians
- other library organizations too
- accrediting bodies (regional)
- and subject-based
- disciplinary groups
- administrative groups
- database groups

draw up a list of target organizations
"mutually-beneficial"

Information

- report on others' activities
- in Chronicle of Higher Education
- educate other groups in mutual concerns, e.g., control of science publications
- require liaisons to report back via ACRL publications
- outreach thru publications
- publicize scholarly activities and publications of ACRL members

Program activity

- develop programs that can be presented at other professional conferences
- repeat successful and appropriate programs
- co-sponsor CE activities and institutes
- identify common concerns
- work on legislative concerns in common
- exchange visits by ACRL leaders and other associations
- joint activities at regional level

Local activity

- provide help to local libraries to link at their level
III. LIAISONS  cont'd

Local activity (cont'd)

local campuses should encourage and fund section chairs to go to subject professional associations conferences
crossover meetings by local chapters and local academic organizations

Identify and strengthen existing links

find out what organizations our members belong to; use these links
use ALA membership form to do this
identify goals of other organizations so as to give better service
use activity sections as liaisons with disciplines (develop guidelines to help)
start with associations where ACRL has been successful, publish conference schedules, encourage librarians to submit papers and attend

Other

courage recruitment of scientists be careful not to duplicate work of other liaison committees
increase visibility
encourage recognition of bibliographies by other associations
publish a directory of librarians with interdisciplinary grant-writing experience
use library technology to link into professional groups and their interests
librarians should take courses in discipline areas broaden and deepen range of contacts mix with booksellers...

IV. CONTINUING EDUCATION

Subject or content

more variety 7
more in-depth (practical) 5
career development 1
fee-based services 1
preservation 1
solicit member ideas 9
role of faculty member 1
program for paraprofessionals 1
up-to-date library development 3
### Subject or content (cont'd)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>interdisciplinary programming</td>
<td>1</td>
</tr>
<tr>
<td>automation (hardware &amp; software)</td>
<td>1</td>
</tr>
<tr>
<td>procedures for online library services</td>
<td>1</td>
</tr>
<tr>
<td>strategic planning (in &amp; outside library field)</td>
<td>1</td>
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<tr>
<td>not have same workshops year after year</td>
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<td>selecting integrated systems</td>
<td>1</td>
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<tr>
<td>expand present programs</td>
<td>5</td>
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<tr>
<td>how to influence legislatures</td>
<td>2</td>
</tr>
<tr>
<td>how to terminate non-productive staff</td>
<td>1</td>
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<tr>
<td>how to deal with problem employees</td>
<td>1</td>
</tr>
<tr>
<td>salary and contract negotiation</td>
<td>1</td>
</tr>
<tr>
<td>cost accounting</td>
<td>1</td>
</tr>
<tr>
<td>teach politics of academic life to newcomers</td>
<td>1</td>
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<tr>
<td>clarify levels</td>
<td>1</td>
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<tr>
<td>training in research methodology</td>
<td>3</td>
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<tr>
<td>encourage mentoring</td>
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<tr>
<td>online catalog &amp; reference</td>
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<td>governance and management patterns in libraries</td>
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<td>preparing staff for automation</td>
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<td>leadership</td>
<td>1</td>
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<td>library reorganization</td>
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<td>emphasis problems and procedures</td>
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<td>repeat research conference offered</td>
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<tr>
<td>at annual in as many locations as possible</td>
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<td>oral panel presentations</td>
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<td>quality for regional</td>
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<tr>
<td>allow state people to give workshops</td>
<td>1</td>
</tr>
<tr>
<td>train at Mid-winter</td>
<td>1</td>
</tr>
<tr>
<td>train trainer for regional workshops</td>
<td>5</td>
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<tr>
<td>greater variety</td>
<td>1</td>
</tr>
<tr>
<td>develop apprentice program</td>
<td>1</td>
</tr>
<tr>
<td>library faculty for evening and weekends</td>
<td>1</td>
</tr>
<tr>
<td>national bank of talent to offer CE</td>
<td>1</td>
</tr>
<tr>
<td>develop regional roster of trainers/CE</td>
<td>1</td>
</tr>
<tr>
<td>knowledgeable ones please</td>
<td>1</td>
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<td></td>
<td>60</td>
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### Instructors

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<td>quality for regional</td>
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<td>allow state people to give workshops</td>
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<tr>
<td>train at Mid-winter</td>
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</tr>
<tr>
<td>train trainer for regional workshops</td>
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<tr>
<td>greater variety</td>
<td>1</td>
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<tr>
<td>develop apprentice program</td>
<td>1</td>
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<td>library faculty for evening and weekends</td>
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</tr>
<tr>
<td>national bank of talent to offer CE</td>
<td>1</td>
</tr>
<tr>
<td>develop regional roster of trainers/CE</td>
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<td>knowledgeable ones please</td>
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### Alternative Delivery Systems

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<td>video courses</td>
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<tr>
<td>satellites</td>
<td>7</td>
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<tr>
<td>correspondence courses</td>
<td>2</td>
</tr>
<tr>
<td>literature review for informal CE of each</td>
<td>1</td>
</tr>
<tr>
<td>self-directed instruction for home use</td>
<td>2</td>
</tr>
<tr>
<td>explore formats</td>
<td>1</td>
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<tr>
<td>explore cheaper formats</td>
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<tr>
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<tr>
<td><strong>Alternative Delivery Systems</strong> (cont'd)</td>
<td>televise (live across country)</td>
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<tr>
<td></td>
<td>use C&amp;RL News to share information</td>
</tr>
<tr>
<td></td>
<td>video cassette</td>
</tr>
<tr>
<td><strong>Links with other organizations or academia</strong></td>
<td>schedule concurrently with other organizations</td>
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<tr>
<td></td>
<td>join with other ALA divisions</td>
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<tr>
<td></td>
<td>library schools</td>
</tr>
<tr>
<td></td>
<td>state library associations</td>
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<td></td>
<td>avoid competition with other divisions</td>
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<tr>
<td></td>
<td>with professors to let them know what state of the art is</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>regional</td>
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<tr>
<td></td>
<td>increase accessibility local resources for state chapters</td>
</tr>
<tr>
<td></td>
<td>less emphasis on national smaller cities</td>
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<td></td>
<td>designate certain people as regional resource people</td>
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<td></td>
<td>pre-conference state association mtgs.</td>
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<td></td>
<td>hold in less expensive locations</td>
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<td></td>
<td>sponsor sessions that would involve entire staff at library site</td>
</tr>
<tr>
<td></td>
<td>transportable CE</td>
</tr>
<tr>
<td></td>
<td>state chapters should be encouraged to develop programs</td>
</tr>
<tr>
<td><strong>Financial and Marketing or Other Resources</strong></td>
<td>more subsidy--give scholarships</td>
</tr>
<tr>
<td></td>
<td>control costs</td>
</tr>
<tr>
<td></td>
<td>seek 3rd party support</td>
</tr>
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<td></td>
<td>1-day workshops at reasonable prices</td>
</tr>
<tr>
<td></td>
<td>approach commercial vendors for money time staff</td>
</tr>
<tr>
<td></td>
<td>lower prices</td>
</tr>
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<td></td>
<td>group prices</td>
</tr>
<tr>
<td></td>
<td>cost recovery for members</td>
</tr>
<tr>
<td></td>
<td>co-fund with chapters</td>
</tr>
<tr>
<td></td>
<td>chapters promote CE</td>
</tr>
<tr>
<td></td>
<td>share slush fund for local programming</td>
</tr>
<tr>
<td></td>
<td>incentives or assistance for further graduate work</td>
</tr>
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<td></td>
<td>source of funds information</td>
</tr>
<tr>
<td></td>
<td>promote with publications</td>
</tr>
<tr>
<td></td>
<td>fund travel of ACRL staff to chapter meetings</td>
</tr>
<tr>
<td></td>
<td>keep costs at break even (no profit)</td>
</tr>
<tr>
<td></td>
<td>reduced rate for local chapters</td>
</tr>
</tbody>
</table>
IV. CONTINUING EDUCATION cont'd

Financial and Marketing or Other Resources (cont'd)

- subsidize costs
- use fewer people for program -- bring down cost
- provide grants for CE courses
- ACRL set aside fund to offer national programs locally (possibly use dues)
- increase stipend to chapters for local CE

Miscellaneous

- protect poster sessions for broad participation
- accreditation and standards for CE
- abolish minimum of 12 participants
- increase information on CE resources
- act as a clearinghouse
- designate people as resource people in region
- promote publications list
- limit enrollment to small groups
- "package" programs presented at annual conference by ACRL committees and take on road
- evening programs
- credit for CE thru library schools
- monitor programs
- hold other than at conference
- national database resource guide
- send out cassettes with tasks to accomplish before CE courses

V. CHAPTERS

Awards

- establish an award for chapters

Financial aspects

- joint dues for chapter and national as a package deal
- increase amounts allocated to chapters be-equitable-regarding-number-of members in a state
- get grant funding
- give chapters money to give out to individuals to do research and projects
- maintain support
- shared "slush" fund for regional programs
# V. CHAPTERS

## Financial aspects (cont'd)

- How will support at state/local level affect national support? 1
- Increase dues for incorporated services 1
- Shorten time for grant request 1
- Find a sponsor to help establish a support system 1
- Fund a regional meeting 1
- Underwrite program development 1
- Don't spend all on newsletters 1
- Give chapters money for their officers to travel to conferences for selves and junior members 1
- Participate in CE 1
- Get leadership training 1
- Fund publications 1
- Support chapter programs 1
- Help support chapter programs 1
- Consider a salary-related dues schedule 1
- Explore problems of differing fiscal years 1

## Programming

- Staff assist chapters more 1
- Exchange program ideas among chapters; encourage this; set up a network 4
- Establish a programs "clearinghouse" for chapters 2
- Let chapters influence national programming more 3
- Bring more CE (co-sponsor?) programs to local levels 16
- Encourage variety in programs including technical services, publication services 1
- Expand speakers program 6
- Encourage timely programs 1
- Videotape and duplicate programs, e.g., on candidates for national offices 1
- Emphasize programs 1
- Regional and state conferences should be promoted 1
- Prepare-conference-planning-kits with suggestions for topics, lists of speakers 1
- Assist small chapters with good programs thru speakers bureau, etc. 1
- Be sure chapters are involved in regional CE programs 1
### Promotion
- More in C&RL News: publicize, report meetings
- Advertise and promote local chapters
- Put out newsletters for chapters
- Publicize benefits of having a local chapter
- Get more visibility at the local level
- Exchange communications
- Publish a list of chapters
- Do more for chapters, then publicize it

### Recruitment
- Make available lists of national members for recruitment at local level
- Staff help extend chapter participation
- Get new people in

### State/Regional Association relations
- Clarify relationship of chapters and state/regional associations
- Should not be necessary to belong to state association to be an ACRL chapter member
- ACRL should work better with state chapter
- Help chapters organize regional coalitions
- Don't compete with them

### New chapters
- Establish more
- Help (guidelines, etc.) in establishment of new ones
- A conference on how to establish a chapter
- A kit on how to establish a chapter for states that don't have them
- "Seed" individuals as a way to encourage more chapters
- Stimulate development of chapters in areas where none exist

### Improve relations with national organizations
- Improve structure of representation at national level
- Clarify relationship between national ACRL and non-ACRL members who are chapter members
- Make national more visible at local level
V. CHAPTERS cont'd

Improve relations with national organizations (cont'd)

- encourage chapter people to join national
- important to have good communication between ACRL staff and chapter officers
- increase support from ACRL staff and officers

Miscellaneous

- encourage special interest groups at local level
- leadership training for chapter leaders
- use chapters as training ground for ACRL officers
- stress local purpose
- provide assistance to help upgrade chapter local talent
- joint chapter activity should be encouraged
- focus efforts here
- have student chapters
- have JMRT at local level
- very important, especially in remote parts of U.S.
- chapters should reach out to new members
- staff and/or officers do a brainstorming tour around country
- create Task Force to investigate ways to give chapters a higher priority
- have meetings at ALA conferences for chapter officers
- help states too small to have chapters
- use chapters to recruit members for national
- survey chapter members on needs
- establish means for providing consultative assistance and financial assistance for worldwide chapter activities
1. ACRL continuing education programs should be expanded so that academic/research librarians may learn new skills and keep old skills current.

2. ACRL should support state and regional chapters in order to encourage a sense of professional identity and peer reinforcement.

3. ACRL should develop and promote vigorously standards and guidelines for academic libraries (such as personnel, collections, faculty status).

4. ACRL should strengthen and better publicize the advisory services that it provides to libraries and academic institutions (e.g., recommendations for consultants, information on what other libraries are doing).

5. ACRL should take a more active role in speaking out on government activities including legislation having a potential impact on academic and research librarianship.

6. ACRL should monitor and help shape library education programs in accordance with the needs of academic and research librarianship.

7. ACRL should strengthen its alliances with other professional and scholarly organizations, thus increasing public awareness of the role of academic and research libraries in the higher education community (e.g., American Council on Education; American Association for the Advancement of Science; American Historical Association).

8. ACRL should continue to sponsor publications (e.g., continuing education syllabi, conference proceedings, books, journals).

9. ACRL should encourage research leave for academic librarians.

10. ACRL should sample member opinion quickly and reliably for such things as program evaluation, planning, setting priorities.
TO: 600 Selected ACRL Members

FROM: Sharon J. Rogers, ACRL President, 1984-85

SUBJ: Priorities for ACRL

ACRL is a dynamic, growing professional organization. ACRL can provide many services for its members — but it can't do everything. ACRL needs your help to determine what its priorities should be.

You are one of the 600 ACRL members who has been asked to contribute about one hour of your time to assess activities that are or could be supported by ACRL. The statements in the enclosed questionnaire are taken from the “Activity Model for 1990” which was adopted by the Board in 1982. (You may read the complete Activity Model in the May 1982 CARL News, pp. 164-169). For each possible ACRL initiative, you are asked to respond to two questions:

1. Is this something ACRL can do?
2. Is this something you want ACRL to do?

ACRL members and their ideas about supporting academic librarianship will be the 1985 ACRL President’s Program at the annual meeting in Chicago as we present the summary and analysis of your responses to this survey. Participants in the 1985 President’s Program then will take your opinions, discuss and debate alternatives, and build a consensus on future priorities for ACRL. The final results will be presented to the assembled participants (if our computers collate it all properly and immediately) and to the second Board meeting for action by the ACRL Board. The results will also be published in CARL News next summer.

Continuing information about the 1985 President’s Program will appear in CARL News. The September, 1984 issue outlines the basic plan on pp. 401-402.

Please accept my sincere thanks for making this contribution to ACRL and the 1985 President’s Program. The questionnaire should be returned immediately, but no later than November 2.
The following rankings are to be used when answering questions. Each question will be ranked on two dimensions:

- **Feasibility/Practicality:** can ACRL do this (or continue to do this, if applicable)?

- **Preference for implementation** (i.e., **Desirability**): do I want ACRL to undertake (or continue) this task?

Within each dimension are 5 possible response categories. On the right-hand side of each question, please circle the number in each category (i.e., Feasibility and Desirability) which reflects your opinion.

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<tr>
<th>Feasibility/Practicality</th>
<th>Preference for Implementation (Desirability)</th>
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<tr>
<td>Definitely Feasible</td>
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<td>Possibly Feasible</td>
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<td>Possibly Not Feasible</td>
<td>Undesirable</td>
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<tr>
<td>Definitely Not Feasible</td>
<td>Very Undesirable</td>
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<tr>
<td>No Opinion/ Don't Know</td>
<td>No Opinion/Don't Know</td>
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The following set of questions pertains to ACRL's goal of contributing to the total professional development of academic and research librarians.

**Continuing education programs** should be encouraged and expanded in order to allow academic and research librarians to learn new skills and update competencies.

In place of Continuing Education programs, and/or in addition to them, the number of articles appearing in the News which deal with the state of the art of academic librarianship should be expanded.

ACRL should increase and expand the publication of reports which advance professional knowledge. Examples of such publications include: Conference proceedings, Evaluation Bibliographic Instruction and Online Bibliographic Databases Searching in College Libraries.

The News should summarize articles from journals like the Chronicle and the Journal of Higher Education so that academic and research librarians can remain informed of developments in the profession, and in higher education.

In place of educational journal abstracts, or in addition to them, College and Research Libraries should include a current awareness column.
• Academic and research librarians should have more opportunities (i.e., beyond the establishment of professional standards) to participate in determining the future of the profession.

• ACRIL chapters should encourage a sense of professional identity and peer reinforcement so that those members unable to attend separate national conferences are not alienated.

• Public relations mechanisms which promote professional and peer identity, such as the Bibliographic Instruction Liaison Project, should be encouraged.

• Career counseling and placement for academic and research librarianship should be strengthened by the following (please answer each entry):

  a. increasing the information available on international job exchanges.

  b. offering more career counseling courses within the Continuing Education program.

  c. providing chapter level career counseling.

The following set of questions pertain to ACRIL's goal of improving service capabilities of academic and research libraries.

• ACRIL needs to vigorously promote standards and guidelines for personnel, collections, references, etc.

    | FEASIBILITY | DESIRABILITY |
    |-------------|--------------|
    | 1 2 3 4 5   | 1 2 3 4 5    | (14-15) |
    | 41 98 33 64 11 101 94 29 20 7 |
    | 17 40 13 26 4 40 37 12 8 3 |
    | (16-17) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 76 97 22 50 6 134 81 23 21 6 |
    | 30 39 9 20 2 52 32 9 5 2 |
    | (10-19) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 71 112 37 24 5 83 96 37 26 10 |
    | 28 45 15 10 2 33 35 15 10 4 |
    | (20-21) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 73 113 25 34 6 72 104 31 37 9 |
    | 29 45 10 14 2 28 41 12 15 4 |
    | (22-23) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 58 120 26 39 8 56 111 30 41 16 |
    | 23 48 10 16 3 22 44 12 16 6 |
    | (24-25) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 39 97 32 69 11 59 98 34 47 13 |
    | 16 39 13 18 4 24 39 14 19 5 |
    | (26-27) |
    | 1 2 3 4 5   | 1 2 3 4 5    |
    | 131 80 17 21 3 133 79 15 19 7 |
    | 52 32 7 8 1 53 31 6 8 3 |
ACRL should strengthen and better publicize its advisory services that are provided to libraries and academic institutions.

Innovation in academic and research library services should continue to be rewarded through such vehicles as new workshops and special awards.

Fiscal and political support (including support of appropriate legislation) for academic and research libraries needs to be strengthened.

ACRL should develop a stronger working relationship with the ALA Washington Office to help strengthen fiscal and political support.

The following set of questions refers to ACRL's goal of promoting and speaking for the interests of academic and research librarianship.

- Projects that further the recognition of librarians as full academic partners (e.g., the Bibliographic Instructional Liaison Project) should be undertaken more frequently and vigorously.

- ACRL should strive to increase public awareness of the role of academic and research libraries.

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<td>97 91 32 20 7 122 66 34 19 8</td>
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<tr>
<td>116 92 12 22 4 150 67 11 16 4</td>
<td>%: 47 37 5 9 2 60 27 4 6 2</td>
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The following activities should be a part of an ACRL comprehensive strategy study aimed at increasing visibility, spokesmanship and representation:

a. strengthen alliances with other professional and scholarly organizations (e.g., the American Association for the Advancement of Science, American Council on Education, etc.)

b. establish joint committees with other professional organizations.

c. encourage ACRL members to attend meetings of other professional associations.

The following set of questions refer to ACRL's goal of promoting study and research relevant to academic and research librarianship.

- Publications (e.g., Continuing Education syllabi, conference proceedings, books, journals) should continue to be sponsored by ACRL.

- National conferences provide an acceptable forum for the discussion and dissemination of research results.

- Vehicles other than the National Conferences are needed in order to discuss and disseminate research results.
Awareness of the role of academic and research libraries should be enhanced by ACRL among such groups as:

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- a. regional accrediting agencies.
  - 86 103 18 31 6 123 82 19 20 3
  - %: 35 42 7 13 2 50 33 8 8 1
  - (40-41)

- b. government agencies.
  - 71 102 20 37 14 111 85 19 16 15
  - %: 45 35 8 7 6
  - (42-43)

- c. scholarly and professional organizations.
  - 117 98 7 17 7 150 78 8 8 4
  - %: 29 40 3 7 3
  - (44-45)

- d. other segments of the library profession.
  - 1 2 3 4 5
  - (46-47)

In an effort to support and participate in the recruitment of promising persons to the library field, ACRL should:

- a. develop and disseminate its own literature on academic librarianship.
  - 83 104 13 35 7 80 95 16 41 13
  - %: 34 43 5 14 3 33 39 7 17 5
  - (48-49)

- b. work locally on recruitment of graduate students.
  - 35 94 25 76 11 56 85 36 50 20
  - 15 39 10 31 5 23 34 15 20 8
  - %: 12 3 4 5
  - (50-51)

- c. sponsor graduate school fellowships.
  - 56 102 25 44 14 88 90 25 25 17
  - %: 23 42 10 18 6 36 37 10 10 7
  - (52-53)

- ACRL should monitor and help shape library education programs in accordance with the needs of academic and research librarianship.
  - 70 102 16 46 11 123 77 18 18 10
  - %: 29 42 6 19 4 50 31 7 7 4
  - (54-55)

- ACRL should take a more active role in speaking out on government activities of potential impact upon academic and research librarianship.
  - 106 98 5 29 8 130 76 11 23 9
  - %: 43 40 2 12 3 52 31 4 9 4
  - (56-57)
The need for research should be more strongly publicized and promoted. ACRL needs to encourage improvements in research skills. Continuing Education courses in research skills should be offered more often to improve research skills. ACM should enhance its efforts at identifying and publicizing issues and topics requiring study and research. ACRL should strengthen its efforts at securing funding for and commissioning of research projects through such means as the Institute for Scientific Information ACM Fellowships or the Statistics Task Force. Research leaves for academic and research librarians should be encouraged. ACRL should actively encourage, endorse and disseminate (through special editorial columns in its journals) the results of relevant research undertaken outside the library profession. A clearinghouse for relevant research in progress should be established.

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The following set of questions pertain to some additional ACRL activities in the areas of membership and administration.

- The format of National conferences (e.g., structure, frequency, length, and location) should be studied for possible modifications.
- Alternative modes of conference and workshop delivery (e.g., videotapes, recordings, decentralization) should be studied.
- ACRL should encourage the establishment of more discussion groups, encompassing a wider range of topics.
- Market analyses of the needs of conferences and workshops should be undertaken.
- ACRL should consider new formats for College and Research Libraries, such as:
  a. more pages
     \%: 17 32 17 27 6
     12345 12345
  b. increased frequency
     \%: 12 25 16 35 11
     12345 12345
  c. monographic supplements
     44 90 42 46 15
     12345 12345
     \%: 19 38 18 19 6
     12345 12345
  d. sections for discussion and research reports
     58 121 23 26 10
     12345 12345
     \%: 24 51 10 11 4
     12345 12345
- Consideration should be given to alternate modes for supplementary publishing (e.g., microfilm, single copy/on demand, online, etc.).
ACRL should consider a newsletter or column in an existing journal addressed to the higher education community (e.g., colleges and universities, accrediting bodies, government agencies, etc.).

ACRL should continue to design Continuing Education courses in the format of a coordinated and integrated curriculum of presentations at progressive grade levels.

ACRL should seek to relate its Continuing Education program to useful parallel offerings of other agencies or associations.

CE course packages should be offered by:

- mail: 35 37 14 10 4
- television: 14 37 22 21 5
- teleconferencing: 13 42 20 20 5
- Computer Assisted Instruction: 17 42 20 14 6

Continuing Education course packages should be available for individual or group use.

ACRL should continue to increase its commitment to the establishment of new local chapters.

ACRL should continue efforts aimed at rationalizing ACRL/chapter relationships, such as the recent revision in ACRL funding of chapters.
In lieu of some funding, ACRL should deliver more services to chapters, such as counseling and programming.

Career counseling and placement activities, such as the existing Job exchange roster for international exchanges, should be enlarged.

ACRL's advisory/referral capability should be broadened to include a consulting roster and/or skills directory.

A Board member should be assigned to meet with and act as liaison, but also advocate, for each ACRL standing committee.

A Public Information Committee composed of ACRL's Past President, the ACRL councilor, and the Executive Director, should be established to coordinate the communication of ACRL views and positions to the larger library community and higher education (e.g., press releases).

The Planning Committee should remain responsible for:

a. short range planning
   %: 46 30 17 7 1
   1 2 3 4 5 1 2 3 4 5
   104 71 40 17 3 88 82 45 19 6
   %: 37 34 19 8 3
   1 2 3 4 5 1 2 3 4 5

b. periodic review of long-range goals and objectives.
   112 73 40 9 0 107 82 44 7 2
   48 31 17 4 0 44 34 18 3 1

The Board should be encouraged to become more conscious of the full costs (dollars and staff time) of programs.

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There should be an upgrading of executive staff salaries to be equivalent with a strong academic library directorate.

Greater permanence in headquarters personnel should be sought.

ACRL should commission the design of an improved Management Information System program to aid in decision making.

ACRL leadership should increase its voice in and support of ACRL objectives in all forums (such as government agencies, professional circles, scholarly circles, etc.).

ACRL should re-commission a study of the feasibility of utilizing teleconferencing techniques to:

- extend programs delivery capability to local, regional and national audiences.
- facilitate conduct of Board, section and committee business.

The feasibility of development of future files for online remote terminal access, such as:

- committee rosters
- research-in-progress files
- skills directories
- placement listings
- committee histories

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<td>47 104 72 19 11</td>
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<td>19 41 28 8 4</td>
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Workshops and orientation sessions should be held for all new committee appointees.

Leadership/group dynamics workshops for newly elected officers and committee chairs should be sponsored.

Ad hoc committees should continue to function promptly, and to be discharged on a timely basis.

ACRL should encourage measures, such as by relieving staff of committee paperwork, to enhance the economical operation of committees.

ACRL leadership should continue to develop its ability to sample membership opinion reliably and quickly for such things as program evaluation, planning, setting priorities, etc.

ACRL should continue to study the comparative costs of in house versus contracted services for Management Information Systems, conference planning, publishing, telecommunications, etc.

The electronic mail system between headquarters and members, ACRL committees, officers, etc. should be continued.

ACRL should commission a study of the work load and work flow in the main office.

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Funding should be strengthened and increased for a program of incentive rewards for:

a. best research
   - 1 2 3 4 5
   - 64 108 19 39 11 80 91 20 41 15 %: 27 45 8 16 5 32 37 8 17 6
   - (32-33)

b. innovative ideas
   - 1 2 3 4 5
   - 62 109 21 39 11 93 84 19 37 13 %: 26 45 9 16 5 38 34 8 15 5
   - (34-35)

c. most active chapter
   - 1 2 3 4 5
   - 35 95 40 51 18 31 60 44 76 34
   - %: 15 40 17 21 8 13 24 18 31 14

The following questions are included in this survey so that necessary demographic and attitudinal data may be collected. It will be used to determine if different groups within ACRL's membership have different priorities for ACRL:

- What is your age group?
  - 5 M: 21 20-30 93 31-40 51 41-50 15 65 60-60 20 61+
  - 8
  - %: 36 20 25 10

- What is your sex?
  - 5 M: 96 Male 160 Female
  - %: 37.5 62.5

- What academic degrees have you completed? (Check all that apply)
  - N
  - %
  - 15 2-year college degree
  - 175 4-year college degree
  - 225 M. L. O.
  - 101 Master's degree
  - 38 Ph.D.
  - 23 Other (please specify)

- Which type of institution best describes your place of employment?
  - 15 Community College
  - 38 Four-year Liberal Arts College
  - 39 Comprehensive Four-year College
  - 42 Research/Doctoral Granting Institution (non ARL member)
  - 89 Research/Doctoral Granting Institution (ARL member)
  - 43 Other (please specify)
Which of the following best describes the type of work you do? (47)

<table>
<thead>
<tr>
<th>Public Services (Reference, Interlibrary loan, Bibliographic Instruction, Government Publications, Media, etc.)</th>
<th>29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Services (Acquisitions, Cataloging, Serials, etc.)</td>
<td>11</td>
</tr>
<tr>
<td>Collection Development</td>
<td>3</td>
</tr>
<tr>
<td>Systems and Automation</td>
<td>2</td>
</tr>
<tr>
<td>Administration</td>
<td>28</td>
</tr>
<tr>
<td>Library Education</td>
<td>2</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>9</td>
</tr>
</tbody>
</table>

Are you eligible for tenure identical to the teaching faculty at your institution? (48)

| Yes | 48 |
| No | 48 |

Is your position ranking identical to the ranking used for teaching faculty (e.g., assistant professor, associate professor, professor)? (49)

| Yes | 54 |
| No | 2 |

Does your institution provide financial support for professional travel? (50)

| Yes | 22 |
| No | 22 |

If you answered yes to the above question, have you used such financial support? (51)

| Yes | 15 |
| No | 7 |

Are you eligible for sabbatical or research leaves? (52)

| Yes | 31 |
| No | 91 |

How many years have you been a member of ACRL? (53)

| 0-5 | 58 |
| 6-10 | 27 |
| 11-15 | 22 |
| 16-20 | 30 |
| More than 20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |

| 0-5 | 23 |
| 6-10 | 11 |
| 11-15 | 9 |
| 16-20 | 12 |
Do you belong to an ACRL regional chapter? (34)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Don't Know</th>
<th>Regional Chapter Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>111</td>
<td>103</td>
<td>23</td>
<td>15</td>
</tr>
</tbody>
</table>

% 44 41 9 6

If you answered yes to the above question, to which chapter do you belong? (35)

Are you a member of any ACRL Committee(s)? (56)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>216</td>
<td>9</td>
</tr>
</tbody>
</table>

% 11 85 4

If Yes, what committee(s)? (37-62)

If you do not hold an ACRL committee appointment, would you be interested in having one? (63)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>42</td>
<td>27</td>
<td>11</td>
</tr>
</tbody>
</table>

% 43 19 34 5

If you answered Yes or Unsure to the above question, do you feel you could get an ACRL committee appointment? (64)

% 28 23 47 51 41 85 4

% 2

Have you ever served on the ACRL Board? (65)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>243</td>
</tr>
</tbody>
</table>

% 4 .96

Did you vote in the last election for ACRL officers? (66)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>175</td>
<td>47</td>
<td>31</td>
</tr>
</tbody>
</table>

% 69 19 12

Have you attended an ACRL regional chapter meeting within the past three years? (67)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>103</td>
<td>150</td>
</tr>
</tbody>
</table>

% 41 59

124
107
• Have you attended an ACRL national conference?
  
  1978 (Boston): 36 Yes 206 No 3 Unsure
  1981 (Minneapolis): 32 Yes 209 No 2 Unsure
  1984 (Seattle): 37 Yes 209 No 2 Unsure
  % 15 84 1

• Have you attended an ALA Midwinter Conference within the past three years?
  
  95 Yes 164 No
  % 37 63

• Have you attended an ALA Annual meeting within the past three years?
  
  171 Yes 88 No
  % 66 34

• How frequently do you read the College & Research Libraries News?
  
  % 66 Always 26 Frequently 3 Betimes 6 Seldom 2 Never

• What amount of the College & Research Libraries News do you read?
  
  % 54 All 112 Most 55 About Half 37 Some 1 None

• How frequently do you read College and Research Libraries?
  
  % 149 Always 73 Frequently 27 Sometimes 10 Seldom 4 Never

• What amount of College and Research Libraries do you read?
  
  % 34 All 94 Most 74 About Half 56 Some 1 None

PLEASE USE THE ENCLOSED POSTAGE PAID ENVELOPE AND RETURN BY NOVEMBER 2

THANK YOU AND LOOK FOR THE RESULTS OF YOUR CONTRIBUTION.

FOR OFFICE USE ONLY
Coder I.D. □□□□□□□□ Date □□□□□□□□
A

125 108
I. External Factors Analysis Statement

The first draft of this statement was prepared by the ACRL Planning Committee. It was then revised by the ACRL Strategic Planning Task Force and incorporated into their planning process, which will culminate in a written five-year plan for the Association. The statement is essentially an updating of the environmental considerations portion of the original ACRL activity model (College & Research Libraries News, May 1982, p.16)

A. Economic Considerations

1. The concept of information as a commodity will increasingly influence decisions relating to libraries.

2. Steady-state or declining purchase power will be available to academic/research libraries.

3. Costs of computing hardware will decline; the costs of software and telecommunications will increase.

4. Competition between libraries and other organizations, both on campus and in the for-profit sector, will increase.

5. Libraries will be expected to increase productivity.

B. Political Considerations

1. Information will be an increasingly important strategic factor in domestic and international markets and in world politics.

2. Conflict will escalate among government, business and academia over the ownership, value, and control of information.

3. Federal government attitude toward academic/research libraries will be increasingly laissez-faire.

4. State governments will increase efforts to centralize authority/control over tax-supported higher education, including academic libraries.

5. The distribution of computing power will diminish the political impact of national consortia.

6. Local, state, & regional computer-based networks will continue to develop.

7. There will be continuing international pressure for bibliographical standardization.
C. Social Considerations

1. Equality of opportunity for women and minorities will continue to be an elusive goal.

2. Illiteracy will continue to be a problem in spite of the efforts of schools, libraries, and the educational reform movement.

3. Well-organized political and religious groups will continue to mount challenges to intellectual freedom.

4. The development of massive databases may threaten individual privacy.

5. Academy-based research activity will advance slowly.

6. The demographic profile and educational needs/expectations of college students will continue to change.

7. The use of non-print and micro-based materials in research and college teaching will increase.

8. Society will continue to press for dollar accountability.

D. Technical Considerations

1. Word processing/communication/computer technology will improve and proliferate.

2. Advances in storage technology will alter the way in which information is published and distributed.

3. Changes in technology will change the kinds of information services provided.

4. Libraries and the for-profit sector will be in competition to meet the demand for speedier delivery of information/documents.

5. Personal ownership of word processing/computing/telecommunications hardware and software will continue to increase.

6. As the use of terminals and microcomputers grows, access to information will become more decentralized.

7. Preservation methods for disintegrating library book stocks will become more effective and more widely used.

E. Human Resources

1. The rigorous competency standards of the educational reform movement will improve the performance of both teachers and students in public schools.
2. Scholarly communication will continue in its present state of relative good health; researchers, scholarly publishers, and librarians will continue to be the major links in the process.

3. Libraries will not become less labor intensive but will require a new mix of staff and skills.

4. Libraries will remain in competition with other organizations for staff.

5. Society will require training and the help of intermediaries to use proliferating online information sources.

6. Information management and data processing staff will be increasingly costly to hire and retain.

rev. 7/6/85

II. Opportunities and Threats

Opportunities and Threats Facing ACRL

Opportunities

Increase membership base, minorities.

Use new communications technology to offer programs, conferences.

Seek new members now in other divisions & associations; especially attract members with special interest in science.

Develop more effective MIS to aid in planning and programming.

Use strategic planning process to better communicate what ACRL is and does.

Facilitate research and scholarship.

Fund raising: for associations; for libraries.

Joint activities with other associations and divisions.

Threats

Loss of members due to weak programming.

Other associations: SLA, MLA, ASIS, state associations.

Other divisions: LITA, LAMA, RTSD.

Increased association dues.

Public relations image of academic libraries and librarians.

Negative image of ACRL within ALA.
III. Market Analysis

Market Analysis of the Association of College and Research Libraries
(Historical, Present, and Future)

- Overall markets and consumers.

Professional librarians
Nonprofessionals?

Working in

- college libraries
- university libraries
- libraries in large research institutions
- libraries in non-academic research institutions
- community college libraries
- preparatory school libraries
- research institutes
- businesses catering to academic and research libraries

ACRL now has as members 8,000 of the est. 22,000 professional librarians working in academic and research libraries in the US.

- Economics.

Librarians' salaries are relatively low among professionals. In non-ARL university libraries, the average professional salary is $24,100. Few libraries pay their employees' professional association dues. Many academic libraries provide at least partial reimbursement for their employees to attend one professional meeting per year.

- Competitive trends.

Many librarians are seeking alternative careers. The movement between libraries and vendors as a career path is increasingly common.

Special libraries are often perceived as offering better salaries and more opportunity for advancement than academic libraries.

Careers in information brokering often become attractive to academic and research librarians

Association competition.

-- Several other associations are in direct competition with ACRL for members: ASIS, SLA, MLA, AALL

-- Some associations are not in competition for members, but do compete effectively for our members' time and commitment: ARL, RLG, OCLC
Several associations attract members of part of the ACRL community; archivists — SAA; historians — AHA, others — Soc. for Scholarly Publishing, e.g.

- Technological.

Library technology is involving many more academic and research librarians.

Also, use of technology by librarians for personal and association business is on the increase.

Some librarians resist technology and do not wish to use it.

Many jobs in academic libraries require use of online systems for reference, circulation, and technical services.

- Government/Political/Legal.

State government intervention in public universities internal budgeting and accounting is on the increase; libraries are experiencing a great need to justify expenditures; are learning to behave in a similar way vis-a-vis their professional association

Tax policies under consideration may jeopardize gift and contributions revenue to libraries in academic institutions.

Public institutions experience frustration with government regulations made without understanding of library constraints.

Copyright issues involving computer hardware and software mean librarians must learn about the law and implement it carefully.

ACRL is affected by government regulations regarding its non-profit status as an "educational" organization.

- Social.

The overall trend toward decentralization is of significance to ACRL. Encouragement and support of chapters caters to this trend. A movement toward regional offerings of courses, institutes, and other learning experiences can also address this.

Within the library community, academic librarians are sometimes perceived as elitist. ACRL is the largest and most financially stable division of ALA — sometimes perceived negatively by other divisions.

- History.

A brief history of the Association is at Appendix A
I. Programs and Activities

ACRL's major activities fall into the following categories:

Publications: ACRL publishes College and Research Libraries, a journal of serious articles on academic librarianship; College and Research Libraries News, a news magazine including reports on library projects! Rare Books and Manuscripts Librarianship, a journal concerning librarianship as practiced in special collections; newsletters of its sections; Choice Magazine, a magazine of reviews for academic libraries; and non-serial publications including reports of committee and section projects, the series Publications in Librarianship, and statistics reports.

Membership Activities: ACRL provides membership services, recruits new members and seeks to maintain present members; supports the activities of its Board and Executive Committee and its Budget and Finance Committee; allocates funds for the support of its sections, chapters, and committees and staff support for discussion groups; provides advisory services; carries on statistical and minor research activities; and operates a Jobline.

Conferences and Professional Development: ACRL holds a national conference every three years; offers continuing education courses at ALA Midwinter and Annual Conferences and at the ACRL National Conferences; makes courses and other activities available at the regional level; & holds an annual preconference of its RBMS Section.

Judith L. Hegg's recent article in the Journal of Library Administration presents an excellent analysis of some aspects of the participation of academic librarians in continuing education activities. Ms. Hegg derives a profile of academic librarians who do and do not participate in such activities. ACRL participation can now be measured against some national figures, and some marketing initiatives are now underway using this data.

Table SA 1 presents registration figures for ACRL courses from ALA Annual Conference, 1981, through the division national conference, 1986. A total of 1130 participants took part in 76 courses during this time. In general, evaluations tend to fall in the excellent and good categories.

Funded Projects: ACRL seeks funding for projects which serve its members but which it cannot fully support. Recently the major such project has been a series of workshops offered jointly by PLA and ACRL on humanities programming and was funded by NEH.

Research: While remaining one of ACRL's goals, this had not been effectively addressed until the 1984-5 year, when the Committee on Research Development, ad hoc, developed a plan for Research Clinics and implemented the first such clinic at the 1985 Annual Conference of ALA. Plans for extending this activity are now underway. The impact on the quality of papers presented at the National Conferences is expected to be felt by the 1989 Conference in Cincinnati.

A summary of ACRL programs and activities, with approximate figures showing input and output measures is attached as Table SA 2.
II. Policies

ACRL is a mature association, although it has undergone constant growth and reorganization in order to remain a viable organization for its members. Its activities are based in a firm foundation of policies and procedures which give direction to its programs and activities, allow for consistent decisions to be made, and permit continuity of operation. Among the foundations documents are the Constitution and Bylaws and guidelines regarding chapters, responsibilities of officers, the Budget and Finance Committee, other Committees, elections and appointments, meetings and conferences, publications, copyright, ethics, free materials, legislation, and standards.

III. Present Strategies

ACRL is in need of strategic planning because its strategies are rather haphazard. For the past several years our strategy for budgeting conservatively in anticipating revenues and generously in anticipating expenses, has been successful. Stringent fiscal controls have been exercised, at least partly because ALA policies have kept salaries down and have constrained expenditures. In addition, a strategy of developing non-dues sources of revenue has been successful in bringing ACRL publishing and conference/continuing education programs to a point where they return all their direct costs, and most of their salary and other indirect expenses. Funded projects have been sought and carried out as a way of supplementing dues revenue to accomplish member goals.

The success of these strategies has resulted in the growth of a reserve fund, now amounting to about six months' expenses. Future planning must give direction to the programs and activities of the association, helping its leaders maintain a safe financial reserve, while effecting the desired goals.

ACRL has an active policy of pursuing new members and retaining existing members. Work with library schools, letters to academic appointees, follow-up letters to those who drop their membership, and mailings to certain targeted groups have been used to solicit members.

In the area of publications, ACRL has a policy of publishing short works of somewhat limited distribution. With the exception of its four serials and the Publications in Librarianship series, ACRL does not aspire to being a major publisher. For the most part, works published grow out of ACRL unit activities.

In its effort to encourage research and publication, as well as making professional development opportunities available to its members, ACRL uses national conferences, held every three years according to ALA policy. The general strategy of professional development and continuing education is in transition, from a program heavily based on courses offered at ALA Annual and Midwinter conferences and at ACRL National Conferences, to one which provides learning opportunities in a variety of formats, locations, and times.
Alone among divisions, ACRL has pursued a strategy of chapter development. ACRL chapters bring association activities to the member, supporting program activities at the local level and offering another opportunity for member participation.

ACRL is also committed to a member-driven Association-wide planning process, exemplified by the work of the Task Force. In addition, ACRL is consciously and by choice operating as a division of the American Library Association and has a commitment to supporting the concept of one library association for all types of libraries and all library functions, with divisions enhancing the value of ALA membership in general, and ACRL in particular serving the needs of academic and research librarians.

IV. Structure

ACRL and its sub-units have 182 committees. Of these, 89 are "housekeeping committees," serving such functions as nominating, budgeting, membership, planning, and conference programming. Most fit into the present set of goals and objectives; some 35 do not; they serve specific goals of sub-units. Committees are appointed by the President to carry out a specific charge. There are 26 standing committees and Editorial Boards which are charged with ongoing functions of the association. Task Forces and ad hoc committees are used to serve time-limited purposes.

Sections are membership units selected by members at the time they join or renew their membership in ACRL. There are three type-of-library sections: University Library Section (ULS), College Library Section (CLS), and Community and Junior College Library Section (CJCLS.) 10 type-of-library sections are based on the kind of work their members do. These include: Anthropology and Sociology (ANSS), Art (ARTS), Asian and African Studies, Bibliographic Instruction (BIS), Education and Behavioral Sciences (EBSS), Law and Political Science (LPSS), Rare Books and Manuscripts (RBMS), Science and Technology (STS), Slavic and East European (SEES), and Western European Specialists (WESS); and Women's Studies (WSS).

Discussion Groups afford a less formal structure, permitting members to discuss matters of common interest, without electing officers, holding committee meetings, or dealing with budget and administrative affairs.

Chapters are important organizations related to ACRL. Not all chapter members are ACRL members, and most chapters are actually sub-units of state library associations. The Chapter structure allows academic and research librarians to meet close to home for purposes of professional development and networking. There are 36 chapters at the end of Midwinter, 1986.
V. **Strengths and Weaknesses**

The Task Force identified these major strengths and weaknesses of the Association at its April 1985 meeting:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Largest division</td>
<td>Not addressing needs of science and technology librarians; systems people; tech. services people; museum libraries</td>
</tr>
<tr>
<td>Most money</td>
<td>Perception of being &quot;elite&quot;</td>
</tr>
<tr>
<td>Publications program</td>
<td>Fragmentation</td>
</tr>
<tr>
<td>Broader perspective than just information and technicians</td>
<td>People don't know what ACRL is</td>
</tr>
<tr>
<td>ACRL members serve on ALA committees</td>
<td>Not enough links with other association</td>
</tr>
<tr>
<td>Strong staff</td>
<td>Not enough research done on librarian</td>
</tr>
<tr>
<td>Standards basis; good evaluation of programs by members</td>
<td>Poor image of librarians in academic community</td>
</tr>
<tr>
<td>Good officers</td>
<td>Too many meetings in a year</td>
</tr>
<tr>
<td>National conferences</td>
<td></td>
</tr>
<tr>
<td>Programs and Activities</td>
<td></td>
</tr>
<tr>
<td>--------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>ACRL UNITS INVOLVED</strong></td>
<td><strong># PEOPLE INVOLVED</strong></td>
</tr>
<tr>
<td><strong>Conf.</strong></td>
<td>Conf. Committ.: Staff: Segal, Bourdon, Eberhart, Davis, Donnelly, et. al.</td>
</tr>
<tr>
<td><strong>Editing</strong></td>
<td>Choice C&amp;RL C&amp;RL News RBML Sect. Nsltrs. In House pubs.</td>
</tr>
<tr>
<td><strong>Up Edu</strong></td>
<td>2 Committees staff: Donnelly.</td>
</tr>
<tr>
<td><strong>Up activities:</strong></td>
<td>Staff: Miller, Bourdon, Segal</td>
</tr>
<tr>
<td><strong>Projects</strong></td>
<td>Staff: Donnelly, Segal. Members: min. involvement</td>
</tr>
</tbody>
</table>
I. Financial History Summary

Table RR 1, ACRL Financial History 1980-1985, includes the actual revenues and expenses for the years 1980-81 through 1984-85. Also shown are the percentages of revenue or expense represented by each of the major categories.

Table RR 2, 1986-87 Preliminary Budget Executive Summary compares the budget for 1986-87 with the budgeted and actual revenues and expenses for the past two fiscal years. This version includes actual revenues and expenses for 1984-85.

II. Facilities

The ACRL staff occupies space on the fourth floor of the Huron Plaza office building at 40 East Huron Street, Chicago. We are on the southwest corner of the building. We have six individual offices and additional internal workstations to accommodate the present staff and equipment. There is also a supplies closet which includes a clothes closet, a small Ricoh copier, and office supplies. Other office equipment includes two CPT word processing stations, a DESK Optical scanner, a TI terminal for transmitting messages, and a Compaq Plus microcomputer with telecommunications, spreadsheet, and database software.

ACRL also has the use of ALA equipment and facilities, including an IBM copier, the ALA membership system on its own terminal adjacent to ACRL office space, and an ALA subscription system terminal, also on the fourth floor. ALA makes available machines to produce transparencies, Kroy lettering tape, and reduced copies.

The ALA headquarters library is equipped to provide most of the necessary monographic and serial requirements of the staff and is well-staffed so as to provide reference, circulation, and audio-visual services.

The Choice office in Middletown is also fully equipped.

III. Information Resources

The major management information reports used by ACRL are listed in Table RR 3, below. Staff is building files on the Compaq Plus. For instance, a growing database of membership files is in the database and searchable online, as well as being usable to generate reports and mailing labels. Financial reports are also on the Compaq. Monthly time sheets are calculated using this tool as well. The Budget database is now on the CPT word processor and available for look-up; we will probably move it to the Compaq. ALA's data processing department now produces many of the reports referred to on Table RR 3, and the new automation system is supposed to allow the tailoring of many more reports and access by divisions using their own microcomputers.
IV. Human Resources

ACRL's human resources fall into two main categories: staff and members.

The largest part of the work of the Association is carried out by its members. Working in sections, chapters, and committees, the members plan and carry out programs involving their members and others. They present programs at local and national meetings, hold discussion group meetings, edit and publish monographic and serial works, teach courses, develop and issue standards and guidelines, put on national conferences, and oversee the financial activities.

Staff members support such activities through the monitoring of administrative aspects, such as actual production of journals and monographs, overseeing meeting details, such as designing, printing, and mailing brochures about programs and activities, registering participants, arranging for meetings, workshops, and courses, and controlling the office procedures engendered by this activity. Staff also takes major responsibility for coordinating activities among units; preparing background documentation for the Board of Directors, Executive Committee, Budget and Finance Committee, and other units upon demand; building and maintaining the budget for the upcoming year; monitoring the financial situation on a day to day basis; answering advisory questions; keeping up liaisons with units as designated; and maintaining membership records, including the roster of all units.

The 8000 personal members work in 14 sections, 36 chapters, and 34 committees and task forces. There are 11 staff members: 6 exempt (professionals) and 5 non-exempt.

The development of leadership among members, particularly the Board of Directors, is of serious concern. The outcome of the ACRL-led Division Leadership Enhancement Program will be an ongoing program to ensure that Division officers have an opportunity to visit headquarters, learn about ALA and division operations, and meet with officers of other divisions.

V. ALA as a Resource

The Policies of the American Library Association in Relation to its Membership Divisions are currently under revision. These policies set forth the framework within which the Divisions operate, including the respective responsibilities of ALA, Divisions, and other ALA units. Division Boards play an important role in developing such policies.

Highly significant as a resource to ACRL are the facilities and services provided by ALA. Without them, ACRL's financial condition would be very different. An organization of the size of ACRL would require its own receptionist, a personnel officer, an accountant, a mailing facility of some kind, a good copy machine, a more fully developed computer system to accommodate subscription and membership functions, and would have to pay its own rent, telephone, and furniture expenses. Staff estimates that
these items would cost ACRL approximately $95,000 in initial expenses for
the first year (furniture, equipment) and about $65,000 annually in rent,
$10,000 annually in telephone costs, and an additional $145,500 annually
in salaries and equipment.

Divisions also serve as a resource for ALA. Division staff provide ser-
vice to ALA members, both Division members and non-Division members. The
Executive Directors in particular spend considerable amounts of time in
ALA management activities, such as strategic planning, data processing
design, budget design work, and interdivisional relations. The ACRL
Executive Director spent approximately 15.5% of her time in such a activ-
ity in 1984-85. The dollar value of that time, including benefits, is
$9,271. Division activities also generate revenue for ALA through
overhead charges on preconferences, continuing education courses, funded
projects, and division national conferences.
Table RR1

ACRL FINANCIAL HISTORY 1980 - 1985

Sources of Revenue

1980-19
<table>
<thead>
<tr>
<th>Membership Activities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Svc.</td>
<td>$6,025</td>
</tr>
<tr>
<td>Exec. Comm. &amp; Board</td>
<td>$6,166</td>
</tr>
<tr>
<td>Budget &amp; Finance Comm.</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Sections</td>
<td>$1,821</td>
</tr>
<tr>
<td>Chapters</td>
<td>$5,067</td>
</tr>
<tr>
<td>Committees</td>
<td>$5,933</td>
</tr>
<tr>
<td>Discussion Groups</td>
<td></td>
</tr>
<tr>
<td>Advisory</td>
<td></td>
</tr>
<tr>
<td>Liaison</td>
<td>$6,691</td>
</tr>
<tr>
<td>Line 1</td>
<td>Membership dues</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Line 2</td>
<td>Publications</td>
</tr>
<tr>
<td>Line 3</td>
<td>Choice</td>
</tr>
<tr>
<td>Line 4</td>
<td>C&amp;RL</td>
</tr>
<tr>
<td>Line 5</td>
<td>C&amp;RL News</td>
</tr>
<tr>
<td>Line 6</td>
<td>In-house</td>
</tr>
<tr>
<td>Line 7</td>
<td></td>
</tr>
<tr>
<td>LINE</td>
<td>OBJECT OF EXPENSE</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td>20</td>
<td>Membership Activ.</td>
</tr>
<tr>
<td>21</td>
<td>Exec. Comm. &amp; Board</td>
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<tr>
<td>22</td>
<td>Budget &amp; Finance Comm.</td>
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<tr>
<td>23</td>
<td>Other Sections</td>
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<tr>
<td>24</td>
<td>Chapters</td>
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<tr>
<td>25</td>
<td>Committees</td>
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<tr>
<td>26</td>
<td>Discussion Groups</td>
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<td>27</td>
<td>Advisory</td>
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<td>28</td>
<td>Liaison</td>
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<td>29</td>
<td>ACRL-100</td>
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<tr>
<td>30</td>
<td>Research</td>
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<td>31</td>
<td>Statistics</td>
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<td>32</td>
<td>Jobline</td>
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<td>33</td>
<td>Standards distrib.</td>
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<td>34</td>
<td>Other</td>
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**Subtotal**: $733,005.00

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<tr>
<td>35</td>
<td>Publications</td>
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<tr>
<td>36</td>
<td>Choice</td>
<td>$1,224,781.00</td>
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<td>37</td>
<td>C&amp;RL</td>
<td>$1,498,739.00</td>
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<td>38</td>
<td>C&amp;RL News</td>
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<td>39</td>
<td>In-House</td>
<td>$1,627,279.00</td>
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<td>40</td>
<td>BCL</td>
<td>$1,394,250.00</td>
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**Subtotal**: $4,148,183.00

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<th>SUBTOTAL</th>
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<tbody>
<tr>
<td>41</td>
<td>Conferences &amp; Workshops</td>
<td>$1,148,183.00</td>
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<tr>
<td>42</td>
<td>National</td>
<td>$1,148,183.00</td>
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<tr>
<td>43</td>
<td>Pre- &amp; Post Conferences</td>
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<td>44</td>
<td>Continuing Ed.</td>
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**Subtotal**: $3,584,546.00

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<tr>
<td>45</td>
<td>Funded Projects</td>
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<td>46</td>
<td>NEH Project A</td>
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<td>47</td>
<td>NEH Project B</td>
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<td>ALA Goal: Award A</td>
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<tr>
<td>49</td>
<td>ALA Goal: Award B</td>
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**Subtotal**: $5,784,767.00

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<tr>
<td>50</td>
<td>UNALLOCATED</td>
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**TOTAL EXPENSES**: $9,025,816.00

**TOTAL EXP. W/O CHOICE**: $8,979,037.00

**ADJUSTMENTS**: $45,846.00

**TOTAL EXP**: $8,979,037.00

**NET**: $45,846.00

**NET**: $8,933,191.00
Line 10: 2 cons. closed out
Line 14: money retd. from LOEX Consulting rev.
Line 19: amts. deferred: Balto; BCL; NEH
Line 41: Seattle Balto, deferrals
Line 48: at year end, no unallocated expenses; all charged to programs.
Line 49: amts. deferred are Balto, BCL, NEH

Line 15: new NEH grant of $152,000 over 16 months.
Line 19: NEH Net deficit: BCL; equipment.
<table>
<thead>
<tr>
<th>Title</th>
<th>Frequency</th>
<th>Source</th>
<th>Use</th>
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<tbody>
<tr>
<td>Staff time reports</td>
<td>monthly, cumulative, annual</td>
<td>staff members</td>
<td>account for past budget for future</td>
</tr>
<tr>
<td>Staff activity reports</td>
<td>weekly</td>
<td>staff members</td>
<td>weekly staff mtg., monthly mgt.</td>
</tr>
<tr>
<td>Management memo</td>
<td>monthly</td>
<td>Segal</td>
<td>report to key members</td>
</tr>
<tr>
<td>Choice reports, subscriptions</td>
<td>monthly</td>
<td>Sabosik</td>
<td>Segal for monitoring, monthly mgt., memo</td>
</tr>
<tr>
<td>Choice Reviews on Cards</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Advertising sales</td>
<td></td>
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</tr>
<tr>
<td>Advertising calls</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>minutes of editorial meeting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>overview of monthly activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;RL News reports: editorial asst. report</td>
<td>monthly</td>
<td>Friedlander</td>
<td>Segal for monitoring, monthly mgt., memo</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>advertising report</td>
<td>monthly</td>
<td>Friedlander</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continuing ed. registrations</td>
<td>daily at peak registration time</td>
<td>Donnelly</td>
<td>monitor progress make go/no go decision</td>
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<tr>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Exhibitor registrations</td>
<td>daily at pre-conference times</td>
<td>Donnelly</td>
<td>monitor progress make promo decisions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publications inventory</td>
<td>monthly</td>
<td>Davis</td>
<td>monitor; make reprint decisions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership statistics</td>
<td>monthly</td>
<td>ALA; Miller</td>
<td>monitor; make promo. decisions; keep key members informed; monthly mgt. memos.</td>
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Table RR 3 (continued)

**ACRL & ALA Management Reports**

<table>
<thead>
<tr>
<th>Title</th>
<th>Frequency</th>
<th>Source</th>
<th>Use</th>
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</thead>
<tbody>
<tr>
<td>Chapter statistics</td>
<td>monthly,</td>
<td>Miller</td>
<td>monitor</td>
</tr>
<tr>
<td>Section statistics</td>
<td>monthly</td>
<td>Miller</td>
<td>monitor</td>
</tr>
<tr>
<td>Roster and update</td>
<td>quarterly</td>
<td>Opalka</td>
<td>keep mailing lists up to date</td>
</tr>
<tr>
<td>Warehouse stock report</td>
<td>monthly</td>
<td>ALA, Davis</td>
<td>monitor stock, make reprints decisions</td>
</tr>
<tr>
<td>C&amp;RL Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Editor's report</td>
<td>monthly</td>
<td>Editor</td>
<td>monitor</td>
</tr>
<tr>
<td>Advertising report</td>
<td>monthly</td>
<td>Choice</td>
<td>monitor mtg. meol</td>
</tr>
<tr>
<td>National conference reports registrations</td>
<td>weekly preceding ConfS.</td>
<td>ALA D.P.</td>
<td>monitor progress</td>
</tr>
<tr>
<td>Statement of goals &amp; objectives</td>
<td>monthly, quarterly</td>
<td>Segal and all staff reptg. to</td>
<td>monitor</td>
</tr>
<tr>
<td>Accomplishments report</td>
<td>monthly</td>
<td>&quot;</td>
<td>&quot;</td>
</tr>
<tr>
<td>Budget Performance reports</td>
<td>monthly</td>
<td>ALA Accounting</td>
<td>monitor</td>
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<tr>
<td>Expenditure Approvals</td>
<td>weekly</td>
<td>ALA Accounting</td>
<td>&quot;</td>
</tr>
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<td>Travel listing</td>
<td>monthly</td>
<td>ALA Executive offices</td>
<td>&quot;</td>
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<tr>
<td>Travel planner and reports</td>
<td>whenever trip taken</td>
<td>Staff member</td>
<td>calculate per-trip cost &amp; per-budget line cost.</td>
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An Operating Agreement between the American Library Association and Its Membership Divisions

I. Purpose

This agreement revises and expands the document entitled "ALA Dues Schedule Transition" which was adopted by the ALA Council in January, 1976. The principal intent of the agreement is to define the fiscal and administrative policies between ALA and its membership divisions. The agreement is based upon the following basic assumptions:

A. The operating agreement is restricted to ALA and its membership divisions. While ALA does have fiscal and administrative relationships with other organizational units, e.g., offices, roundtables, committees, etc., these are governed by other compilations of policy and procedure.

B. A primary purpose of the operating agreement is to define those services which divisions receive from ALA at no cost and those for which charges are made to divisions. In addition, the document seeks to establish a cooperative framework in which the inevitable questions of organizational relationship can be addressed and resolved.

C. While it is the policy of ALA to provide considerable autonomy and responsibility to the divisions, the corporate and legal entity is the American Library Association. The resulting requirements of sound audit, accounting procedures, tax and legal requirements are ALA's and must be maintained in all acts of divisions.

D. Divisions of the association are expected to assume financial responsibility for division staff and division program activities, including division publications, within the limitations set by division budgetary ceilings for the appropriate fiscal year, as approved by the ALA Executive Board.

E. This agreement shall be reviewed, periodically, by all appropriate persons and shall be revised no later than five years from its acceptance.

II. Definitions

A. Budgetary Ceiling

ALA By-Laws Article IX provides, "...annual estimates of income shall be based upon the unexpended balance remaining from the previous year plus anticipated revenues for the next budget year. In no case may expenditures be budgeted in excess of the estimates of income arrived at in this manner..." The figure resulting from this calculation is the maximum level of expenditure for any division and hence becomes the budgetary ceiling. The derivation of the budgetary ceiling is a process involving collaboration between ALA fiscal staff and division staff, review by the ALA Executive Board, and approval by the ALA Council, as specified in the Operating Agreement.

B. Balance

The amount remaining in a fund when debts have been subtracted from credits. Division balances are those sums remaining in a budget account at the end of a fiscal year after all expenditures are paid and constitute one element in the budgetary ceiling.

C. Basic Support

That array of services provided by ALA to all divisions at no charge as a result of the division's functioning as a membership unit of ALA. ALA will support the basic indirect costs of divisions up to the 1981 levels. Where higher levels result from the growth of division staff and/or program, additional indirect costs will be negotiated between ALA and the division. Basic support includes the following:

1. Administrative services—switchboard and receptionist services, telephone equipment, purchasing, shipping, receiving, mail distribution, and warehouse space and service.

2. Conference arrangements—Divisions will receive the support and assistance of the ALA Conference Arrangements Office. Support for annual conference and midwinter meetings will include such things as AV services, conference telephone services, staff travel and housing, postage, photocopying and duplication. Exhibit space and a parlor for division membership activities will be provided whenever space is available. Meal functions of divisions at conferences are expected to be self-supporting.

3. Fiscal services—routine fiscal services including accounting, payroll and related services, assistance with budget preparation, travel advances, and credit cards. Divisions will be provided budget reports at least monthly in such detail as the ALA accounting system permits. Charges to divisions for ALA services will be reviewed by Division Executive Directors.

4. Headquarters library services.

5. Membership record services.

6. Office space—Space and related costs (heat, light, janitorial services) in ALA-owned buildings will be provided on an equitable basis considering each division's personnel, equipment and non-warehouse storage needs at the level utilized in 1981.

7. Office supplies—standard office supplies such as pencils, pens, envelopes, etc. The list of standard office supplies maintained by ALA will be reviewed annually with representative participation from divisions.

8. Furnishings and equipment—ALA will purchase and own basic office equipment and furnishings such as desks, chairs, file cabinets, typewriters and office machines. Additionally, divisions may purchase from their own funds furnishings and equipment and shall have control over
III. Provisions

A. Dues

Divisions have the right to establish their own personal and organizational dues structures. (Adoption of this policy will require amendment to the ALA By-Laws Article I Membership Sec. 2A and 2C.) It is COPES' recommendation that the scale for organizational dues and the list of benefits for membership contained in Article 2C be reviewed from time to time and that the By-Laws simply reflect that organizational dues for ALA shall be established by the Executive Board and Council.

Further, the By-Laws should be amended to reflect the same principle for organizational dues and special divisional dues. i.e., division membership is separate from ALA membership, and all organizations must belong to ALA and must pay division dues in order to belong to a division.

The By-Laws should also empower divisions to establish personal and organizational dues by vote of their membership.

Discount and special promotion dues authorized by the ALA Executive Board will apply only to that portion of dues applying to ALA membership. Divisions will receive proportionate reimbursement for "free" division choices of continuing and life members.

B. Council Actions with Fiscal Implications

Council resolutions which would impose specific assignments on a division will be reviewed by COPES with the division board of directors to assess any financial impact. COPES will report back to Council with recommendations as to any budgetary adjustments necessary to implement that assignment prior to final Council action on that item.

C. Publishing Activities

A division may publish materials in three ways: through ALA Publishing Services; on its own; or through an outside publisher. Materials printed through ALA Publishing Services must be approved by the ALA Publishing Committee for first consideration.

The ALA Publishing Committee has the responsibility for control of the ALA imprint. ALA's publishing program is administered through ALA Publishing Services including obtaining copyright and rights and provisions for duplication or republication for ALA and its units.

Divisions exercise editorial and managerial control of their periodicals. The ALA Publishing Committee will be informed of plans for any new division periodicals prior to publication.

ALA Publishing Services will pay royalties to divisions for division-generated materials. Divisions may negotiate with ALA Publishing Services on other variables of publishing.

A division has the option of purchasing the production and distribution services of the Central Production Unit. A division may also purchase advertising services from the Publishing Services Department, in which case ALA Publishing Services guarantees the net revenue forecast. In addition, Copes has recommended that there be an annually reviewed Journal Advertising Plan.

ALA has the sole right to record and market programs at ALA conferences with the advance consent of the units and speakers. Royalties from the sale of recorded programs of division conference programs are credited to divisions. Divisions may arrange through the Publishing Services Department for recording at division pre-conferences, seminars, institutes, and workshops or they may arrange for the recording and marketing of these programs on their own.

D. Printing and Duplicating

Divisions will be charged for printing and duplicating services on an actual use basis.

E. Personnel

Each division shall be responsible for generating the income required for the salaries, wages, and fringe benefits of division employees. All employees of ALA operate under the general policies and procedures established by the ALA Executive Board and administered by the ALA Executive Director including the unified classification and pay plan.

ALA will annually review the need for staff cost of living adjustments which will be approved through normal ALA budgeting procedures. When approved, the cost of living adjustments are applicable to all ALA employees.

A uniform pay plan for ALA staff has also been established. In future revises of this plan, ALA will seek to establish levels consistent with the variations in size and scope of divisions. The assignment of the appropriate level for division staff will be negotiated by the Executive Director of ALA and the Board of Directors of each division.

The process of recruitment, employment, retention, evaluation, and termination of division Executive Directors shall be a participatory process involving the participation and concurrence of the division Board of Directors. The division's Board of Directors shall have the opportunity to annually review the performance of the division's Executive Director.

Division Executive Directors shall have the authority to select, evaluate, and recommend termination of all division employees consistent with ALA personnel policies and practices.

Cost of interview travel for final applicants for division Executive Director positions is paid by ALA General Funds. ALA General Funds also pay a fixed amount toward moving costs for professional personnel of divisions.

Division employees who retire or are terminated are paid for unused vacation from a central fund produced from an annual charge against unit salary budgets.

F. Division Conference, Pre-Conferences, and Related Programs

Divisions may conduct pre-conferences, workshops, institutes, seminars, and national division conferences. A division is responsible for all costs incurred in planning and carrying out such a conference. Indirect costs are paid to ALA based on the most recent indirect cost study made by the ALA fiscal staff and approved by the ALA Executive Board. Net balances (positive or negative) resulting from conferences are posted to the sponsoring division.

In the case of divisional national conferences, ALA will pay division income on net funds received in advance of such conferences. An agreement will be negotiated between ALA and each division holding a conference with respect to the rate of income to be paid, when funds begin to earn income, and the point at which the conference account will be closed and funds paid to the division. The agreement will also specify the conditions under which the division will pay income to ALA if funds are advanced. All funds generated by conferences will be under the control of the ALA Fiscal Services Department.

G. Annual Conferences

Annual conferences of the association are an association-wide activity attended by all members regardless of divisional affiliation.

Financial support from ALA to divisions and other units for annual conference programming will be the result of an explicit and equitable process in which the divisions participate.

H. Division Fund Balance

The Executive Board and Council endorse in principle the concept of income payments to divisions on their annual unbudgeted cash reserves. The reality is that the present ALA accounting system is not capable of producing the needed financial information. ALA will give a high priority to upgrading the accounting system in order to implement this principle.

During an interim period, the Executive Director shall begin the initial implementation of this policy with divisions having significant fund balances to establish procedures and recommend policies.

I. Special Projects of Divisions

All requests for external (non-ALA) funding for division projects must be approved by the division Board of Directors. Additionally, all proposals and contracts for such funds are signed by the Executive Director of ALA in the name of the association. All special projects are conducted in accordance with established ALA policies and procedures and the conditions of the grant or contract.
A proposed planning process for the Association of College and Research Libraries

Prepared by the Ad Hoc Planning Process Subcommittee
Susan Klingberg, Chair
Keith Russell, Member

ACRL’s strategy for planning over the coming years.

At the January 1983 ALA Midwinter Meeting, the ACRL Planning Committee appointed a subcommittee to develop a planning process for the Association. The Subcommittee first outlined the elements which the process or model should include. It should: a) produce a written plan to guide ACRL for at least five years; b) have a built-in mechanism for evaluation and feedback; c) accommodate periodic reviews and updating; and d) simplify (as well as codify) the work of the ACRL Planning Committee in carrying out its responsibilities.

The model proposed in this report is a strategic planning model. The strengths of strategic planning have been widely discussed in recent management literature. In his book Academic Strategy, George Keller discusses the advantages of this approach. He describes strategic planning as active rather than passive, responsive to changing conditions, competitive, decision-oriented, and participatory (Johns Hopkins, 1983, pp.143-148). Another distinctive characteristic of strategic planning is its emphasis on formulating and evaluating alternative strategies.

Together, this report and model constitute a “plan for planning” for ACRL. It should first be reviewed and revised by the Planning Committee before being more widely distributed within ACRL. Following review and revision, the Subcommittee recommends the appointment of an ACRL Strategic Planning Task Force. The Task Force would be responsible for coordinating the planning process and writing the resulting strategic plan. When this is accomplished, the ACRL Planning Committee would take over responsibility for implementation of the plan, as well as evaluation, periodic review, and updating.

The planning process

Accompanying this report is a schematic diagram or model of the proposed planning process (see p.397). This section provides additional information about the steps in the process. The purpose of each step is explained, and related issues to be considered are discussed. Wherever possible, an appropriate group or body is named to carry out
the step, and other stakeholders in the process are identified. An effort has been made to show the relationship of steps to one another. The diagram is meant to be a symbolic representation of the planning process. Aspects such as the sequence of steps should not be strictly interpreted. For example, some strategies may be approved and implemented while the plan is still being written.

The involvement of ALA, ACRL, and ACRL sections and committees is represented in steps 6 and 7 of the model, under "Strategy Formulation." Please note that these groups are involved at other steps of the process as well.

Appraisal

1. Analyze member needs. For this analysis, membership data is reviewed and trends are studied. Current members and potential members are profiled, as well as others who might make use of ACRL programs, e.g., non-ACRL members who attend ACRL continuing education programs. For these categories, both current and future needs that could be met by ACRL are identified. A formal survey of at least a sample of the membership is recommended. ACRL has not done a member needs assessment in recent years. President-elect Rogers has also expressed interest in a member survey. In addition to identifying member needs, this survey could provide feedback on the effectiveness of programs and services. Contracting with an outside consultant would be the most efficient way to conduct the survey.

Other sources of data should also be reviewed, such as membership files and evaluations from participants in ACRL continuing education programs. All of the data gathered on members and members' needs should be synthesized in a written members' needs statement. The analysis and resulting statement could be contracted out to a consulting firm experienced in member needs analyses. Another option is to assign responsibility to ACRL headquarters staff, who would work with the Membership Committee. It is expected that such an analysis could be completed in seven months. Provision should be made for updating the member needs data periodically.

2. Analyze the external environment. In this step, economic, political, technical, and social factors are reviewed which have an impact on the Association. The Activity Model Committee's final report (abbreviated AMFR; ACRL News, May 1982, pp.164-69) already does much of this, but it should be reviewed and updated to cover both current and anticipated environmental conditions.

The ACRL Planning Committee, since it has been heavily involved with the AMFR, should be given responsibility for this analysis and for the production of an external factors analysis statement. Work on this could begin at any time, and it could be completed in three months. A literature review of recent publications may be a good starting point.

3. Identify strategic factors. This step builds on the activities in the two preceding steps. The data collected is further analyzed and opportunities and threats facing the Association are identified and assessed. Much of this will be similar to a market analysis, where markets and competition are analyzed.

This analysis should be carried out by the ACRL Strategic Planning Task Force and should culminate in a working document which will guide subsequent planning activities. Suggested completion date is two months after step 1 is completed (i.e., the end of month 9).

4. Conduct a strategic audit. The strategic audit is a statement of ACRL's current situation and, to some extent, how it got there. It identifies the mission, activities, programs, services, policies, management information system, etc., of the Association, along with strategies it is pursuing. It also identifies and discusses the strengths and weaknesses of the Association. Much of the work for the strategic audit was done in preparing the AMFR; that work will only need updating. Another document to refer to as a model is the American Association of School Librarians' Future Structure Report (AASL, March 1984), which has elements of a strategic audit and of strategy formulation.

The ACRL Strategic Planning Task Force should work closely with ACRL headquarters staff to prepare this report. It should be completed three months after step 3 is completed (i.e., end of month 12). Step 3 should be completed before step 4, but a good deal of the work can proceed simultaneously.

5. Review and revise as needed the ACRL mission, goals, and objectives. This step should be done with the ACRL strategic audit in hand. While the mission, goals, and objectives were revised in the preparation of the AMFR, another careful review will be necessary in light of the information turned up in steps 1-4.

This review should be carried out by the ACRL Strategic Planning Task Force. It should be completed two months after step 4 is completed (i.e., the end of month 14).

Strategy formulation

6. Carry out activities planning. First, it is necessary to refer back to the strategic audit for an analysis of the current mix of programs, services, and research activities. Recommendations can then be made to alter the mix by modifying, dropping, or adding activities.

This step can be worked on at any time, but it cannot be successfully completed before the completion of step 5. The ACRL Strategic Planning Task Force should produce written recommendations on activities within one month of the end of step 5 (i.e., the end of month 15).

7. Carry out resources planning. This step involves reviewing ACRL resources currently available.
able and those needed in the future. It includes organizational resources, human resources (ACRL headquarters staff and the membership), office facilities and equipment available to ACRL, financial resources, and the ACRL management information system. For financial and organizational issues, the ALA Operating Agreement will be a useful document. The advantages and constraints of the present relationship between ALA and ACRL should be studied.

A resources planning report should be completed within one month of the end of step 6 (i.e., the end of month 16). It is recommended that headquarters staff prepare the resources planning report according to guidelines from the Task Force.

8. Evaluate and select best strategic alternatives. Essentially this step brings together the step 6 and 7 reports, and decisions are made concerning the mix of activities and the resources needed to support them. An important consideration is the feasibility of implementing the various alternatives.

The ACRL Strategic Planning Task Force will do this evaluation and will prepare the following report, within two months of the end of step 7 (i.e., end of month 18).

9. Prepare a written five-year ACRL strategic plan. A five-year period was selected for the plan to cover because it is a reasonable time span in terms of forecasting. It would be difficult to make predictions any further in advance for internal factors such as member needs and for external factors such as advances in technology. Also, a five-year plan would mesh well with the Activity Model, which looks ahead to the year 1990. The first five-year plan should be developed to cover from 1986 to 1990.

The plan should focus on the strategies selected in the preceding step. It should also draw on other key steps in the planning process by synthesizing work done in the strategic audit and in the activities and resources planning reports. The plan should demonstrate how activities and services relate to organizational goals. It should provide clear and specific direction to all of the elements within ACRL (governance bodies, headquarters staff, sections, etc.). Documents such as the mission and

president/president elect; and e) two additional members.

Recommendation 3. To kick off the planning process, a facilitator should be hired to work with the Task Force for one day to explain considerations in strategic planning, etc.

Recommendation 4. The ACRL Board of Directors should set aside appropriate funds to support the work of the Task Force. Such funding should allow additional meetings of the Task Force beyond those possible in conjunction with ALA conferences. Perhaps extra meetings could be scheduled to coincide with ACRL executive committee meetings, which some of the Task Force members would be attending.

Recommendation 5. The target date for the completion of this project should be no later than the annual ALA conference in the summer of 1986. Based on the time estimates in this document, it will take approximately 18 months to complete the planning process.

Recommendation 6. Finally, the charge of the

goals statements and possibly some of the previous planning reports could be included in the appendix. The ACRL Strategic Planning Task Force produces this report (at the end of month 18) as its last major activity.

Strategy implementation

10. Implement the strategy that has been developed. The ACRL Planning Committee will oversee and coordinate the implementation of the strategies described in the written plan.

Evaluation

11. Evaluate. Since the strategic plan is designed to cover a five-year period, it could be reviewed and updated either annually or biennially. During each review, one or two years could be added to the period covered so that the plan is self-perpetuating. This review and update would be conducted by the ACRL Planning Committee, which would also evaluate the effectiveness of the plan and progress in its implementation. On an ongoing basis, the Committee would also informally monitor factors which might affect Association plans and activities.

Recommendations for executing the planning process

The subcommittee recommends the following for executing the above described planning process:

Recommendation 1. This report describing the planning process should be disseminated as widely as possible within ACRL. It should be published in College and Research Libraries News, and in other ways brought to the attention of ACRL members.

Recommendation 2. Once a revised report is accepted, an ACRL Strategic Planning Task Force should be appointed immediately to begin coordinating the planning process.

The Task Force should have 7 members, including a) at least two regular members of the ACRL Planning Committee; b) one past ACRL president; c) the ACRL executive director; d) the ACRL vice-

Planning Committee should be revised to place more emphasis on planning as a primary responsibility. Within ACRL's governance structure, the committee should be responsible for developing plans and strategies which will help the Association achieve its goals and objectives. This responsibility is not adequately described in the current charge. In addition, the task of reviewing and revising the five-year plan should be added to the charge.

Editor's Note: The authors prepared this report as members of an ad hoc subcommittee of the ACRL Planning Committee. Susan Klingberg, chair, is from California State University, Sacramento, and Keith Russell is from the Council on Library Resources, Washington, D.C. On June 25, 1984, the full ACRL Planning Committee endorsed this report. At its meeting on June 26, 1984, the ACRL Board of Directors voted to endorse and support the planning process described in the report and to appoint a Strategic Planning Task Force.