PACSCL Strategic Plan
Approved by the Board of Directors, February 26, 2015
(for mission/vision and environmental analysis, see page 5)

Long-range goals, strategic objectives, and initial priorities

1) **PRESERVATION AND ACCESS**

- Assure completion / sustainability of existing programs (consortial survey migration; hidden collections; extension of finding aids database to newly processed collections etc)
    - **YEAR 1:** Begin migration of Consortial Survey database to Finding Aids database
    - **YEAR 1:** Identify issues for the maintenance and improvement of the Finding Aids database, including encouraging members to contribute new finding aids, and establish a task force to work on these issues -- including creating a testbed for working out issues of contributing other finding aids
    - **YEAR 2:** Complete migration of consortial survey records; assess relative strengths of AT and AS and monitor needs for migration of finding aids database; continue to encourage members to add finding aids to database

- Develop new and sustainable projects in the areas of cataloging/surveying, digitization, preservation (of both physical and digital objects)
    - **YEAR 1:** Begin implementation of a shared digital repository via a project focusing on diaries; develop plan for project sustainability
    - **YEAR 1:** Plan next steps, such as training, workshops, information and resource sharing, for digital asset management and preservation/storage capabilities, based on the 2014 survey
    - **YEAR 1:** Write a 2015 CLIR or other nationally- or state-funded grant application(s) if appropriate
    - YEAR **2 and ongoing:** Implement CLIR or other grants if funded; assess and revise programs for digital asset management and shared digital repository; consider new programs if and as warranted

- Provide increased access to collections by collaborative physical or online exhibitions and related activities, including projects that draw on work done in existing cataloging and processing projects
    - **YEAR 1:** Convene a group of PACSCL members to plan a major collaborative exhibition; select a topic and identify a venue or venues.
    - **YEAR 1:** Advocate among members for adding PACSCL "branding" in acknowledgements when 3 or more PACSCL members loan materials to an exhibition
    - **YEAR 2 and ongoing:** Continue planning and seek funding for major exhibition
    - **YEAR 2:** Assess success of efforts to add PACSCL "branding"

- Maintain an ongoing environmental scan of available and emerging technologies to facilitate presentation, search, and discovery for member institutions and the consortium as a whole
    - **YEAR 1:** Assign responsibilities at the Board level and in committees and working groups to assure sustainability of existing PACSCL assets [e.g., consortial survey database, PACSCL finding aids database, adding new assets to this list as they are created] in the face of technological change
    - **YEAR 2 and ongoing:** Evaluate, assess

- Facilitate cost-effective access to technological support for individual members involved in PACSCL projects in order to increase access and preservation capacity for PACSCL as a whole
  - **YEAR 1:** Provide another AT bootcamp for institutions wanting to contribute to the shared Finding Aids database
  - **YEAR 1 and ongoing:** Maintain ongoing scan for training opportunities in the Greater Philadelphia and mid-Atlantic region and share information via listserv and social media
  - **YEAR 1 and ongoing:** set up a "hotline" program and a roster of PACSCL experts willing to provide advice and assistance in setting up and troubleshooting equipment and software related to PACSCL projects for members without robust technical infrastructure
  - **YEAR 2 and ongoing:** Continue to provide AT bootcamp(s) and imaging assistance as needed; add programs to support new and ongoing PACSCL initiatives as they arise

2) STRENGTHEN THE PACSCL COMMUNITY

- Improve communication of PACSCL activities and initiatives to the full membership
  - **YEAR 1 and ongoing:** Review the pacscl-l google group subscriptions with member reps; add subscribers as necessary.
  - **YEAR 1 and ongoing:** Remind PACSCL members that they can post to pacscl-l. Encourage members to follow PACSCL on Facebook and Twitter and to amplify postings using the hashtag #pacscl through periodic messages on Google group(s) and at meetings.
  - **YEAR 1 and ongoing:** Share non-confidential information on upcoming board meetings with reps and encourage them to comment or suggest additional agenda items
  - **YEAR 1:** convene small group to explore interest in and ways of extending the reach of PACSCL meetings by podcasting, slidesharing, or livestreaming
  - **YEAR 2 and ongoing:** Evaluate, assess, refine or revise as appropriate

- Build ways to solicit input/have ideas about projects and member needs trickle up
  - **YEAR 1:** Encourage feedback when announcing committee/working group meetings, e.g., "if you cannot attend the meeting but want to make a suggestion, please leave a comment on the Doodle poll"
  - **YEAR 2 and ongoing**: Assess and adjust, adding feedback mechanisms as necessary.

- Facilitate sharing of information on member activities and programs with the PACSCL membership via a PACSCL calender of member events

  - **YEAR 1:** Survey the members to determine the degree of interest in PACSCL providing this service, if it means an expenditure for part-time staff or an intern. Depending on PACSCL member interest, hire an intern or provide a subvention to a member library for a portion of an intern's time to gather information from member libraries and post on website and social media.
  - **YEAR 2 and 3:** Assess and adjust.

- Create content-rich and robust programmatic meetings as well as meetings with abundant opportunities for member interaction and information sharing
  - **YEAR 1:** Form a program committee to make recommendations and establish a working method for three programs a year. Begin to hold three meetings, with budget support for

refreshments and occasional speaker honoraria and travel funds.
- **YEARS 2 and 3:** Evaluate and, if necessary, adjust

- Provide training programs, alone or in partnership with other organizations, based on member needs and interests; gather information and resources on best practices and provide programs or training on these topics as appropriate
  - **YEAR 1:** hold an Archivist Toolkit bootcamp; update the links on the best practices web page to include the standards used for PACSCL's Hidden Collections project and the new diaries initiative (as it progresses).
  - **YEAR 2 and 3:** reassess and expand as necessary.

- Foster diversity of gender and race/ethnicity at all levels of special collections work, and within PACSCL governing structures
  - **YEAR 1:** Maintain or improve the gender balance on the PACSCL board and expanded representation of race/ethnicities as opportunity presents itself.
  - **YEAR 1 and ongoing:** Explore ways of connecting with diverse communities
  - **YEARS 2 and ongoing**: assess and adjust as necessary

- Develop ready reference / orientation material for new members and member staff
  - **YEARS 1 and ongoing:** Convene a group to identify the information needs of new members; produce orientation materials and develop programs or social events to meet these needs.
  - **YEARS 2 and ongoing**: Assess and adjust as necessary

3) REACH OUT TO SCHOLARS/USERS AND OTHER STAKEHOLDERS

- Make an ongoing case for the value of PACSCL, its members, their projects, and holdings to stakeholders of every kind
  - **YEAR 1:** Identify and prioritize the key audiences, internal and external, to be reached and map PACSCL's value to each
  - **YEAR 1:** Identify communications channels for reaching these audiences
  - **YEAR 2:** Refine the case documents for the audiences and share with them
  - **YEARS 2 and ongoing:** Assess, adjust

- Reconceptualize web site and the role of members in contributing content
  - **YEAR 1:** Call for comments on ways to improve the website (via SurveyMonkey or focus group) and/or seek PACSCL members to advise on a new structure and platform and to aid in collecting content
  - **YEAR 1:** Begin to develop new site structure and content
  - **YEAR 2 and ongoing:** continue to develop new site while assessing and adjusting

- Increase PACSCL activity on social media and professional mailing lists
  - **YEAR 1:** increase frequency of FB and Twitter posting to at least daily
  - **YEAR 1:** identify volunteers to post on PACSCL's behalf to relevant lists / google groups
  - **YEAR 1 and ongoing:** Encourage PACSCL members "like" and follow PACSCL on FB and Twitter, and to tweet and RT with #pacscl hashtag
  - **YEAR 2 and ongoing:** Assess; consider new social media; adjust as necessary

- Strengthen relationships with other consortia (in both the special collections community and the broader regional cultural/scholarly community) to share information on PACSCL member collections and programs, as well as PACSCL's own programs
    - **YEAR 1 and ongoing:** Identify those consortia and leaders of those consortia; in addition to sharing info via lists, explore opportunities for co-branding programs.

- Support K-12 education by the maintenance of a web portal to PACSCL collections and by support of National History Day and similar programs
    - **YEAR 1:** Identify a group of institutions with high interest in K-12 education and convene a meeting to brainstorm and recommend programs, including improvement of phillyresearch.net
    - **YEAR 2 and ongoing:** Implement and assess/adjust

4) STRENGTHEN THE PACSCL ORGANIZATION

General observation: Since the Board is the committee of the whole for this item, perhaps we could institutionalize the practice of reviewing our progress in this area, possibly in a less formal and more social setting, every summer. This could be combined with a "welcome new board members" agenda item.

- Assure sustainability of assets
    - **YEAR 1:** Identify the assets to be tracked and develop appropriate timetables and mechanisms for periodic review of these assets. Current assets include but are not limited to PACSCL's reserve funds; the consortial survey database; the finding aids database; the OPAC for six members; the web site and social media accounts; and the Google groups.
    - **YEAR 2 and 3:** Assess and revise as necessary, taking steps to assure the sustainability of the assets.

- Periodically review dues structure
    - **YEAR 1:** Convene a representative task force to review this over the summer and make a recommendation to the Board; open discussion with the PACSCL representatives
    - **YEAR 2:** Based on member input, strategic aims and budget needs, implement new dues structure. Review and assess every two years.

- Create a long- and short-range budget and review annually
    - **YEAR 1:** Create a two-year budget based on strategic aims
    - **YEARS 2 and 3:** Implement budget; review and assess; prepare longer-range budget (e.g., 3 to 5 years) as warranted.

- Periodically review organizational structure (board, committees, task forces, etc.) and its effectiveness in meeting goals and objectives
    - **YEAR 1 and ongoing**: include this review in an annual review of the strategic plan

- Develop new funding sources
    - **YEAR 1 and ongoing:** Survey the organization's programmatic funding needs and organize a working group or groups to seek funding sources to meet those needs.
        - **YEAR 2:** Examine the need for and feasibility of a campaign to build endowment.

Mission/Vision

Vision Statement
PACSCL will be a model for regional collaboration and will make known internationally the greater Philadelphia area as one of the nation's preeminent centers for research and study using rare books, manuscripts, graphics, and other special collections materials.

Mission Statement
The mission of PACSCL is to:
- Facilitate an environment that promotes both a supportive special collections community and opportunities for members to leverage the power of collaborative work;
- Encourage scholars, educators, and other diverse audiences to explore and engage with member institutions' uniquely rich holdings and to appreciate PACSCL collections as integral parts of an interconnected regional resource

Four key challenges / focus for the future

1. Through sustainable consortial initiatives, strengthen members' ability to preserve and provide access to an internationally-significant body of collections
2. Strengthen the PACSCL community and foster collegiality through improved member communication and access to information on member activities, training opportunities, best practices, etc.
3. Reach out to the worldwide community of scholars (in the broadest sense, from senior researchers through K-12 students, area residents, and lifelong learners) to provide increased awareness of PACSCL and PACSCL member collections and programs
4. Strengthen PACSCL's organizational structure and funding in order to sustain project outputs and provide appropriate technological infrastructure

SWOT ANALYSIS (strengths, weaknesses, opportunities, threats)

Strengths
- largest special collections consortium in U.S.
- scope and size of collections -- internationally significant body of material (in both senses of "internationally": collections span the globe and attract a worldwide audience of researchers)
- diversity of member institutions (size and types of institutions, collections, target audiences)
- high concentration of area collections
- wealth of staff expertise
- collegial atmosphere among institutions
- track record of successful projects
- financial stability for current operations

Weaknesses
- lack of active participation by many PACSCL staff and member institutions
- same small group of people tend to step up each time
- communication breakdowns, especially between board and members
- hard to craft initiatives that address all members' needs or priorities
- no active projects over past year
- difficulty sustaining project outcomes
- almost no paid staff
- lack of outreach and advocacy

- lack of stable funding base for expanded activities, given the current dues structure and absence of an endowment

Opportunities
- The region's emphasis on education, arts and culture, and history
- good relationship with several important funders
- funders like consortial collaboration
- always new researchers in Philadelphia
- recent and new developments in special collections field (e.g. open source, digitization, EAC-CPF)
- potential for collaboration with other special collections organizations and initiatives (e.g. Delaware Valley Digital Humanities Group, Archivists Being Awesome/DVAG)
- others looking to PACSCL as a leader and example (e.g. Chicago institutions)
- recruitment of new members from other Delaware area cultural heritage institutions

Threats
- effects of economic recession (e.g. hardships for member institutions, less grant money available)
- money spent on membership could be spent elsewhere within an organization
- if we don't do "it," whatever "it" may be, someone else might
- potential for new special collections groups to divert energy, ideas, and activity away from PACSCL
- potential loss of membership if perceived value isn't seen as being returned
- difficulties in addressing new developments in special collections field