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Strategic Planning for the Chinese American Library Association: From Process to Implementation

Wenli Gao, University of Houston, TX, USA

Raymond Pun, Stanford University, CA, USA

Lian Ruan, University of Illinois Urbana Champaign, IL, USA

ABSTRACT

This report explored the Chinese American Librarians Association (CALA)'s strategic planning process for 2020-2025 during COVID-19. The paper introduced CALA's mission statement, values, and discussed the importance of the strategic plan. A strategic planning task force was formed to create an opportunity for membership input in virtual town hall meetings and surveys. The authors presented a case study on the process of revising a strategic plan and discussed the implementation phases. The authors also shared the challenges and recommendations in organizing strategic planning for a library association.

Keywords
Strategic Plan, Library Association, Planning, Communication, Evaluation, Case Study

INTRODUCTION

In the spring of 2020, members of CALA (the Chinese American Librarians Association) devised a plan to organize the next set of strategic priorities for 2020-2025. To move CALA forward, then CALA President Fu Zhuo 2019-2020 appointed members to serve on a taskforce to research and update a strategic plan for CALA in January 2020. Led by the CALA President Elect and the Executive Director, the Taskforce consisted of 18 members of experienced and senior CALA members. Taskforce members met virtually to discuss ways in soliciting input from CALA membership and worked together on the Strategic Plan (2020-2025) that was approved by the CALA Board in June 2020 (see Appendix 1). In this report, we briefly share our experiences in developing a strategic plan for a library association and explore the process, implementation, challenges and recommendations for others considering designing a new strategic plan for their organizations.

What is a strategic plan and why is it important for associations such as CALA to be renewing one? McGuire notes that

"typically, strategic plans run from three to five years, incorporate conceptual foci that the library will be devoting time, resources, and attention to, and can be a range of length and

specificity. They may include the mission, values, guiding principles, and a list of goals that the library aims to strive for throughout this active period" (p. 3, 2020).

CALA is an international library association with over 500 members spanning across the United States, Canada and Asia since 1973. A new strategic plan was necessary to explore the areas of growth and opportunities for improvement within the association. As described by Parent (1988), "strategic planning is one way that [library] associations may use to provide more effective leadership" (p. 344). Strategic planning can support new leadership opportunities for its members, for those who are leading the taskforce and for general membership. Parent (1988) summarized the value of strategic planning using three points: 1. Strategic planning is a powerful tool. 2. Strategic planning is an opportunity to provide effective leadership. 3. Strategic planning is a responsibility. By aiming to update CALA's next goals, a strategic planning process was very much needed to facilitate these discussions.

As a global library association focused on professional development and opportunities for members across the world, it was important to review CALA's mission and vision statements as stated in the 2015-2020 Strategic Plan. CALA's mission statement is to

"support the professional development of CALA members and enhance the leadership development of Chinese American librarians through training, mentoring, networking, and collaboration with colleagues in the United States and abroad. CALA's work inspires Chinese American librarians to meet their professional goals and to make valuable contributions to the global library community" (CALA, 2016a, para. 5).

CALA's vision statement is that it is "an inclusive, diverse, and member-driven community which provides members with the opportunities to share knowledge and achieve their professional aspirations…members are key collaborators, contributors, and leaders advancing the field of librarianship globally" (CALA, 2016a, para 6).

On reviewing CALA's statements, its core organizational values remain important in guiding the direction of what CALA is committed to:

- Professionalism
- Collaborative leadership
- Positive, open, and inclusive environments
- Transparency and integrity
- Service to members
- Continuous learning
- Effective communications
- Stewardship of resources
- Global perspectives

These documents and values are important aspects of discussion in understanding CALA's past, present and future. Another important document was the 2015-2020 strategic plan. Approved by the CALA Board, November 5, 2015, the 2015-2020 strategic plan focused on building the

"strengths, capabilities, and diligence of [CALA] members … and to promote better communication among Chinese American librarians; to serve as a forum for discussion of mutual interests and professional concerns among Chinese American librarians and to promote the development of Chinese and American librarianship" (CALA, 2016b, para. 1).

The CALA 2020 Strategic Plan Taskforce (2014-2016) organized a series of online town hall meetings held from November 18, 2014 to January 14, 2015.

During this time, the taskforce met with over 65 CALA members and identified what CALA can do for its members. As a result of this work, they identified six strategic areas: "1. Membership Recruitment, Retention, and Engagement 2. Leadership Training and Development 3. Local Chapter Development 4. Professional Development Opportunities through Training and Mentoring 5. Professional Networking through Cutting-edge Technologies 6. CALA's Impact on Local, State, National, and International Levels" (CALA, 2016b).

Built on successful online town hall meetings of the 2015-2020 Strategic Plan, the 2020 task force also implemented online town hall meetings through spring 2020, and this will be explored in the major changes and implementation sections. It is important to acknowledge what has been accomplished and what needs to be examined further. To understand how strategic planning can be achieved effectively, we will provide a brief overview of the literature on strategic planning.

One of the main approaches to CALA's planning is to organize virtual town halls. The task force organized a series of virtual town halls on Zoom for all members to attend. In addition to the town halls, members can also submit their feedback on a google form survey. The town hall meetings provided an opportunity to discuss a series of questions posed about the 2015-2020 plan and the 2020-2025 plan. Gathering qualitative feedback for strategic planning is a common activity by academic organizations such as the University of Texas Southwestern Medical Center at Dallas Library (Higa-Moore, Bunnett, Mayo, & Olney, 2002; Nitecki, Livingston, Gorelick, Noll 2013). From CALA's perspective, the activity required effort from task force members to facilitate and take notes for each session, and analyze and compile the feedback from each session. In the following section, we explain the process more thoroughly.

PROCESS

Preparation

After the president appointed the taskforce of five members in January 2020, the co-chairs decided to have a more inclusive taskforce to hear voices from different levels. The co-chair reached out to board members, committee chairs, and chapter presidents for volunteers. The co-chair also contacted several stakeholders who were not on the initial list but were important for CALA to consider in the new strategic plan, such as a representative from the Asian/Pacific area. In the end, the taskforce of 18 members was formed. The co-chairs reviewed the key documents like town hall meeting questions and minutes from the 2015-2020 Strategic Planning sessions.

Taskforce meetings and questionnaire

The co-chairs organized two taskforce members meetings at the end of January and early February in 2020. During the first meeting, norms and expectations for members were discussed. The team also discussed the timeline and process for the strategic plan process, and established a target date of completion. Originally, it was planned that some events would happen virtually, and some would happen in person during the American Library Association (ALA) Annual Conference. However, due to the unexpected COVID-19 pandemic, all of the town hall meetings happened

virtually. As we agreed to conduct town hall meetings to collect feedback from members, it was important to have preset questions to guide our discussions during the town hall meetings. Initial questions were compiled at the first meeting, but there were some discrepancies to finalize the questions. As a result, the second meeting was scheduled. The meeting was mainly designated to finalize the questions. Most of the questions were used from the last strategic planning. The eight questions were asked in over five town hall meetings:

- What is your feedback on CALA's vision, mission and value statements?
- CALA has six strategic priorities. What do you think CALA has accomplished the most and the least so far?
- What has CALA done for you professionally?
- What has CALA done for you personally?
- Compared with other library associations (ALA, IFLA, CEAL, ALCTS, APALA, etc.), what do you think CALA can adopt?
- What improvement can CALA do to meet your expectations?
- What is your long term career goal, and how can CALA help you?
- What do you want CALA to be in the next five years?

Online Survey

The task force also created an online survey to collect more data from members not available to attend the town hall meetings. To document our progress, to reinforce transparency by informing members regularly about the progress and to have a centralized place for important information, the task force decided to create a webpage on CALA Website on the process of the strategic plan. Town hall meeting times and minutes were posted as the process moved on, and the link to the online survey was also posted on the website.

Timeline and Key Activities

After the initial preparation, the co-chair of the task force sent an announcement about the new strategic plan on the CALA listserv. The announcement talked about why we are doing this and the importance of getting involvement from members. In the announcement, the co-chair also listed CALA's achievements in the past five years to boost morale and encourage members to set up new goals and move CALA to a higher level. This initial announcement served as a foundation for future works. Starting late February to the end of April, there were five town hall meetings scheduled via Zoom. A "save the date" email was sent to CALA listserv about two weeks before the town hall meeting, and an email with discussion questions for people to think about ahead of time and the link to Zoom was sent one week before the town hall meeting. Reminder emails were sent one day before each meeting. Since there were eight questions, the first two town hall meetings focused on the first four questions, and the third and fourth town hall meetings focused on the last four questions. The last town hall meeting was designated for people to express their ideas for all of the questions, and voice any concerns and suggestions not covered by the questions. After each town hall meeting, minutes were cleaned and shared both on CALA listserv and the strategic plan process website. A total of 72 CALA members attended the five town hall meetings.

Meeting Minutes

After the town hall meetings, the strategic plan task force analyzed the minutes to identify recurring themes that would be incorporated to the new strategic plan (see Appendix 2). The draft plan received comments from the strategic plan task force members, the CALA Executive Committee of the Board, and the CALA Board. After each round of review, revisions were made based on comments. Since the new strategic plan has to be approved by the board before becoming official, it was sent to board members a week before the board meeting in June 2020 so that members could have time to read and digest the plan. To make it more transparent and understandable, the co-chair presented the strategic plan process, major changes from the past strategic plan, and plans for implementation during the board meeting. The new strategic plan was approved by the board during the board meeting on June 29, 2020. After the approval, the new plan was shared through the CALA listserv to all members, and a webpage was created to guide the organization for the next five years (CALA, 2020c).

MAJOR CHANGES IN THE NEW STRATEGIC PLAN

Compared with the 2015-2020 strategic plan, there were some major changes in the new plan. For the vision, mission, and value statement, there were three major changes. First, at the town hall meetings, many people expressed a need for research and scholarship, as a majority of CALA members were from academic libraries. Research and scholarship is an integral part for their tenure and promotion. Moreover, as we value diversity, inclusion, and equality, advocacy was added to our mission, vision, and value statements to highlight the importance of having our voice heard in the current environment to advocate these goals for librarians of color. Finally, there was confusion re: the "stewardship of resources" in the previous plan. After a discussion and clarification with the executive director, it was changed to the word "accountability" to avoid ambiguity.

For goals and objectives, one of the major changes was to add action verbs to all goals. It exemplifies CALA's action driven nature. The new goals are to:

1. Increase Membership Recruitment, Retention, and Engagement
2. Conduct Leadership Training and Career Development
3. Provide Professional Development Opportunities through Training and Mentoring
4. Support Local Chapter Development
5. Offer Professional Networking through Digital Technologies
6. Make CALA's Impact on Local, State, National, and International Levels

Another change to the goals included moving the goal *Provide Professional Development Opportunities through Training and Mentoring* to third place from fourth place. This change reflects the membership's expressed needs for professional development opportunities through training programs and professional mentoring. It also reflects CALA's priority and determination to systematically provide additional training for members' needs, especially in the current situations where funding from institutions has become scarce.

There were additional changes relating to specific goals and objectives. For membership recruitment and engagement, the new objective was to establish tangible goals and set target numbers for membership recruitment. It also emphasized publicizing local activities and engaging

members locally and online. As the pandemic set our new norms for working and engaging with people, there were opportunities to unite members more in the virtual environment. Another focus for the goals was to continue supporting CALA members' leadership and career development. To be specific, the new plan stated that CALA will provide support for CALA leaders to attend leadership training programs, such as the Leadership Institute for Academic Librarians and the ALA Leadership Institute. By aiming at certain programs, CALA can strategize and take actions on selecting candidates to support and set up funding for training. At the local chapter level, the new plan set up objectives to foster collaborations among chapters by providing opportunities to host joint training or online conferences. This came up because of the success that collaborations achieved in recent years. Furthermore, as chapter leaders evolve, there exists a need to coordinate training and succession planning. CALA leaders heard this concern from local chapters, and in the coming years, would work on coordinating efforts to develop robust programs for chapter leaders to transit to their new roles, and develop their leadership skills at the same time. For the objective in professional development, since research and scholarship were added to our vision and mission statement, they were also incorporated into one of the objectives. In the 2015-2020 strategic plan, there was also a goal for professional networking through cutting edge technologies. At that time, social media such as Facebook and WeChat were considered cutting edge. However, whatever cutting edge was then was not cutting edge at this moment. As professional networking was still a goal members wanted to retain, the wording was changed to digital technologies to include new channels of communication. Another wording change was to replace *ALA ethnic affiliates* with *National Associations of Librarians of Color affiliated with the ALA*. This was purely a new recommendation by the Joint Council of Librarians of Color (JCLC). Finally, as diversity, inclusion, and equality advocacy were added to mission, vision, and value statements, the new plan stressed CALA's impact on diversity, inclusion and social justice issues to reflect what we valued in our goals and objectives.

IMPLEMENTATION PLAN

Without an implementation plan in place, a strategic plan would not be guaranteed to achieve the goals/objectives as defined and expected. For this new 2020-2025 strategic plan, the implementation plan was added and accountability was emphasized. The plan states:

> "CALA president will select a theme each year based on the strategic plan, and CALA EC, board, and committees will focus their work to implement the plan. Attainable and measurable milestones will be established under the president's leadership. We will strive for making CALA a better and stronger organization in search of excellence."

In 2020, the CALA president has chosen the goals *Conduct Leadership Training and Career Development* and *Offer Professional Networking through Digital Technologies* as the focus. Each strategic goal/objective will be incorporated in the semi-annual and annual report template for CALA officers, committee chairs and chapter presidents. The reports will be reviewed by the President and CALA Board.

A few ideas came up when brainstorming the implementation of strategic plans among CALA leaders. For example, to strengthen the goal of increasing membership recruitment, retention, and engagement, a few actions could be taken, such as member kudos, which will call for members to submit their achievement, then announce on the listserv, and publish in CALA

newsletter. Another idea to fulfil this goal is to systematically announce recognitions and awards opportunities, and provide support for members to apply for those if needed. For the goal of conducting leadership training and career development, CALA plans to send leaders to leadership training such as the Harvard Leadership Institute for Academic Librarians and ALA Leadership Institute. A selection process will need to be in position before implementation. CALA also plans to host a series of webinars inviting library leaders with Asian heritage to talk about their paths to leadership, to identify barriers, mentor younger generations, and to create a leadership pipeline. Rome was not built in a day. It will take a few years and a few presidents to implement these ideas.

CHALLENGES AND RECOMMENDATIONS

Changing environments make the strategic planning face challenges (Germano, 2012). The potential benefits that the strategic plan may bring include clarifying the relationship between individuals and the organization, realizing the common vision, improving organizational communication, and more specifically, the overall improvement of management and services (McNicol, 2006). To determine specific goals is based on vision, shared values, and understanding of key issues, meanwhile incorporating monitoring and assessment as part of the strategic plan implementation (Dole, 2013). As a non-profit voluntary organization, CALA kept exploring how to develop a management approach to evaluate the implementation of the strategic plan and maximize outcomes to benefit the members and the library community.

Several recommendations to consider are listed as follows:

- Empowering and involving CALA leaders and members on planning are important.
- Keeping reaching out to members by hosting online activities especially during the Pandemic time, such as hosting the town hall meeting via Zoom platform is proven to be effective.
- Implementation plan is clearly built within the strategic plan.
- Developing and delivering effective leadership training will help ensure the successful implementation of the plan.
- Making good use of the president's theme, action plans from each committee as well as mid-year and annual reports to track and check the completion of goals is also critical.
- Making process transparency is critical.
- Keeping documentation on social media, web pages and archives and making them accessible will help accomplish the goals, identify issues, and make changes accordingly.

CONCLUSION

A well-developed strategic plan needs a careful plan and design. Through CALA experiences on strategic planning, we found it true. Collaboration among taskforce members, Board and CALA members is also crucial to a successful shared planning, shared vision and shared goals. As a result, members will be inspired and empowered to carry out the plan and all goals will be attained. It is important to note that changes are inevitable and that values, missions and goals must always be reviewed in the process to ensure that they are reflective of members' input.

This case study focused on how a library association can carry out a strategic planning process remotely even during the pandemic. Even if there was not a pandemic, the strategic planning process would have still been conducted remotely. Important considerations for library associations in planning strategic priorities are the challenges and recommendations that we highlighted. Member engagement in the process is crucial and transparent communication strategy is needed. By empowering the membership and leadership communities to participate, share ideas and feel included, this strategic plan is truly a reflection of their needs, visions and aspirations to consider for the next five years.

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APPENDIX 1

CALA 2020-2025 Strategic Plan

To continue moving CALA forward, Fu Zhuo, CALA president 2019-2020, appointed CALA 2020-2025 Strategic Plan task force at the beginning of 2020. Taskforce members met and set up timelines and questions for town hall meetings. The five online town hall meetings, held from February 20, 2020 to April 30, 2020, attracted 72 CALA members to attend online. The town hall meetings focused on eight questions regarding CALA's mission vision statement and what CALA can do for members. The draft strategic plan received comments from the strategic plan task force members, CALA Executive Committee, CALA Board, and was approved by the board during the board meeting on June 29, 2020.

The CALA 2020-2025 strategic plan will focus on six strategic areas that maximize strengths, utilize expertise, sharpen skills, deliver high value to members, and heighten the association's far-reaching impact on CALA and the LIS field:

1. Increase Membership Recruitment, Retention, and Engagement
2. Conduct Leadership Training and Career Development
3. Provide Professional Development Opportunities through Training and Mentoring
4. Support Local Chapter Development
5. Offer Professional Networking through Digital Technologies
6. Make CALA's Impact on Local, State, National, and International Levels

To effectively implement the strategic plan, CALA's financial and operational practices will prioritize and support these six strategic areas. These strategic areas will also guide CALA to develop and launch quality programs and services that aim at inclusive member recruitment and engagement, leadership training and development, local chapter development, professional development opportunities, professional networking and connections, and advocacy.

Mission Statement

To support the professional development and research scholarship of CALA members, advocate Chinese American librarians in professional organizations and enhance the leadership development of Chinese American librarians through training, mentoring, networking, and collaboration with colleagues in the United States and abroad. CALA's work inspires Chinese American librarians to meet their professional goals and to make valuable contributions to the global library community.

Vision Statement

CALA is an inclusive, diverse, and member-driven community which provides members with the opportunities to share knowledge and achieve their professional aspirations by providing support for research, leadership, and scholarship. CALA members are key collaborators, contributors, and leaders advancing the field of librarianship globally.

Core Organizational Values

CALA is committed to:

- professionalism
- advocacy
- collaborative leadership
- positive, open, and inclusive environments
- accountability, transparency and integrity
- service to members
- continuous learning
- global perspectives

Mandates

In order to maintain compliance and achieve success, as a registered non-profit organization in Illinois, CALA must adhere to mandates required by state (i.e., the Illinois Secretary of State and Attorney General) and federal laws (i.e., the IRS).

Five-Year Goals and Objectives

1. Increase Membership Recruitment, Retention, and Engagement

Goal: Identify and develop creative and innovative programs and services to recruit, retain, and engage members locally, nationally, and internationally.

Objectives:

1) Continue to be an inclusive librarians association that welcomes and values diversity, and opens its membership to all library professionals who are interested in the mission and vision of CALA.

2) Advocate CALA's strengths and highlight CALA's distinctiveness from other library associations in mission and membership recruitment.

3) Enhance communications among CALA members, using digital technologies to recognize member achievements and share member expertise and resources.

4) Set a specific target number for membership recruitment. Explore a variety of channels to bring in library professionals and supporters from all type of libraries, LIS schools, and library related business organizations.

5) Publicize local activities and engage members locally or through online presence.

6) Connect members to develop a sense of belonging in CALA, regardless of age, experience, and background; engage members and provide services to develop a community in which members can obtain guidance for various professional needs.

2. *Conduct Leadership Training and Career Development*

Goal: Develop and deliver effective leadership training and career development programs through CALA's program or other leadership programs to sharpen members' leadership skills in the 21st century.

Objectives:

1) Provide leadership development opportunities tailored to the needs of CALA members.

2) Provide support for CALA leaders to attend leadership training programs, such as Leadership Institute for Academic Librarians and ALA Leadership Institute.

3) Identify, cultivate, coach, and train CALA members to become future leaders in the Library and Information Science field in the 21st Century, including associations such as the ALA, IFLA, and Library Society of China.

4) Empower and encourage members to develop leadership skills in a diverse cultural environment by serving CALA members in leadership positions and working in different types of libraries and with a diverse team setting.

5) Assess, evaluate, and improve the efficiency and effectiveness of CALA committee operations and leadership management.

6) Increase the role that CALA plays as an advocate and model for leadership training and development of librarians of color in achieving, evaluating, and measuring CALA program/initiative outcomes; and influence ALA leadership policies and practices toward a more inclusive system.

3. *Provide Professional Development Opportunities through Training and Mentoring*

Goal: Serve as a significant professional development platform to meet its members' dynamic professional needs and nurture growth.

Objectives:

> 1) Leverage and expand existing professional training and mentoring programs within and beyond CALA.

> 2) Develop and deliver responsive professional development programs that build skills and aptitude based on members' specific needs, such as research and scholarship.

> 3) Continuously assess and improve all programs, including the mentoring program for new members and new leaders, as well as programs for returning members and leaders.

> 4) Develop a long term plan to provide and share resources on professional development for members.

4. *Support Local Chapter Development*

Goal: Enhance local chapter development through joint programming and funding, chapter leader training and support, and chapter member recognition.

Objectives:

1) Invest more financial resources at the chapter level and provide funding support through national membership rebate programs, joint initiatives, membership recruitment and retention, and fundraising.

2) Foster collaborations among chapters by providing opportunities to host joint training or online conferences.

3) Improve and maintain communication and training between the CALA national office and the chapter offices to improve chapter leadership skills, capacity, and accountability in order to lead and manage chapter business.

4) Provide professional development opportunities to help members establish networking and mentorships within each chapter. Coordinate training and succession planning for chapter leaders.

5) Strengthen connections between chapters and other associations at a national level.

5. *Offer Professional Networking through Digital Technologies*

Goal: Inspire CALA members to learn from each other, network, and connect on a large scale with a global perspective through digital technologies.

Objectives:

1) Promote CALA as a "hub" for members to meet virtually and/or in person.

2) Identify and support digital technologies and partnerships that will enhance the professional networking and connection opportunities of CALA members.

3) Connect CALA members with library colleagues in China and other regions.

6. *Make CALA's Impact on Local, State, National, and International Levels*

Goal: Collaborate with members, leaders and other partners/organizations to increase CALA's impact on local, state, national, and international levels to support equity, diversity and inclusion.

Objectives:

1) Preserve and promote Chinese and Chinese American culture and librarianship in collaboration with professionals in China and other regions.

2) Support research programs that demonstrate the value of Chinese American librarians and the role of CALA members in the LIS field.

3) Establish closer relationships and collaborations with other organizations, including National Associations of Librarians of Color affiliated with the ALA and IFLA, to advocate equity, diversity, inclusion and social justice issues, and to promote CALA locally, nationally and internationally.

4) Build a strong international profile and develop a global outreach strategy.

Implementation Plan

CALA president will select a theme each year based on the strategic plan, and CALA EC, board, and committees will focus their work to implement the plan. Attainable and measurable milestones will be established under the president's leadership. We will strive for making CALA a better and stronger organization in search of excellence.

The CALA 2025 Strategic Plan Task Force

- Wenli Gao (wgao5@uh.edu) Co-chair
- Lian Ruan (lruan@illinois.edu) Co-chair
- Qi Chen (qchen@ccsj.edu)
- Ping Fu (Ping.Fu@cwu.edu)
- Jianye He (jhe@library.berkeley.edu)
- Leping He (Leping.He@asu.edu)
- Michael Huang (michael.b.huang@stonybrook.edu)
- Grace Liu (gliu@uwindsor.ca)
- Katherina Lee (katherinalee@ntu.edu.sg)
- Weiling Liu (weiling4cala@gmail.com)
- Yuan Li (yl7@princeton.edu)u
- Wen Nie Ng (wenng@vt.edu)
- Ray Pun (raypun101@gmail.com)
- Min Tong (Min.Tong@ucf.edu)
- Lucy Wang (X4WANG@bridgew.edu)
- Daniel Xiao (danxiao@library.tamu.edu)
- Hong Yao (Hong.Yao@queenslibrary.org)
- Vincci Kwong (vkwong@iusb.edu)

APPENDIX 2

Compiled Responses from Town Hall Meeting Minutes

Question 1: What is your feedback on CALA's vision, mission and value statements?

- Add diversity and inclusion in our mission and vision statement because of our work with ethnic affiliates and JCLC.
- For values, keep track of documents for stewardship and we may need clarity on this.
- Include advocacy in our values.
- Need to be careful how we spend resources (money/people) and preserve these resources.
- Consider accountability, transparency with reason and be open.
- Support scholarships for members.
- Combine a few similar values to shorten the list.
- Service to members can be narrowed down as a value. For example, professionalism and scholarship are specific.

- Advocacy part for members is missing in the mission. What is our role in advocacy? Advocating Asian American librarians' presence such as ALA, and other professional associations, etc. Can it be a core value?
- Consider disaster preparedness as a core value to support each other during crisis times? It feels ad-hoc and not happening every time.
- We need to add more scholarship and research support (publishing, presenting) under value statement.
- They still look great.

Question 2: CALA has six strategic priorities. What do you think CALA has accomplished the most and the least so far?

- Chapter work is very important and CALA has been supportive of local activities.
- Collaboration is needed for different chapters. Zoom platform has been helpful.
- Membership recruitment (#1) is a priority and national impact (#6) too.
- A discussion for #5 Professional Networking through Cutting-edge Technologies or "State of the Art Technologies" -- Example: change this statement as "Professional networking including cloud based or digital technologies".
- Change "Cutting-edge" and replace with digital technologies or state of the art technology.
- A discussion on #6 CALA's Impact on Local, State, National, and International Levels: international has been very strong in CALA (IFLA membership).
- Local activities need to be shared. We may not know what others are doing locally. They can share and report activities in the newsletter, possibly?
- A discussion on #2 Leadership Training and Development - we should invest in more, focusing on research and publishing, and scholarship work, or providing funding for specific leadership programs (ARL, Harvard, etc.) for CALA leaders. We may want to consider using the word "career development" instead.
- What have we been doing well? ALA has been dropping its membership so CALA needs to focus on retention and recruitment.
- Not CALA membership fee issue, we may need to keep track the data of recruitment/retention of members (archiving the data).
- Can we add advocacy to be considered as the priorities?
- Membership data might show progress in member recruitment and engagement.
- Leadership Training and Development has been doing excellently well (series of successful workshops on leadership development; more CALA members are elected to national/international level library professional organizations).
- It is still hard to mobilize local chapter members.
- Collaboration between chapters is encouraging.
- CALA can do more in networking with other professional organizations.

Question 3: What has CALA done for you professionally?

- Create committee/leadership opportunities, not easy in ALA to serve in these roles.
- CALA has something for everyone: presentation opportunities, committee work and we need to let members know about them.
- Professional service opportunities, and members find a professional community to network through CALA.

- CALA has been identified as a home association for some members.
- Formal mentorship program and helpful for all members at all different levels who are new or seasoned.
- Consider opportunities to learn management skills that may not be readily available at our day jobs.
- Support tenure track librarians to meet tenure track criteria or promotion/tenure process.
- Committee service work, special projects that can involve more people.
- Providing opportunities to serve at the state or national level and connections with people.
- Professional development - should we consider another leadership training (back in 2016 with Maureen Sullivan)? We can consider something related to joint programming with APALA, or other organizations to develop together.
- A member stated that they benefit a lot from leadership development training.
- CALA provided an opportunity for me to co-write together and engage in scholarly work.
- CALA provided ways to engage with others and bring back to the home libraries and understand how others are doing it in home institutions including online presentations.
- Local chapter conferences are low key for new people, a good place to start their presentations.
- More structured training, strategic planning, organizational development - in some organizations, they hire professional consultants with facilitators to guide us through planning. Good idea to consider it if we have funds. We need guidance on what we need to ask or get done and what kind of people we should involve so we can have a bit more structure and professional/formal process in place for 5 years.
- Travel grant supports CALA members' crucial professional activities (such as IFLA fellows).
- Service experience helps with developing professional skills, library reviews and networking.
- CALA also provides publishing opportunities (CALA's peer-reviewed journal).
- Provided funding to travel and present and attend international and national conferences. Connected me to many more professionals.

Question 4: What has CALA done for you personally?

- CALA has helped members create new friendships and a sense of community.
- There is support that CALA has created including connections with home countries.
- CALA has WeChat and other resources that help connect CALA members.
- Consider personal stories about CALA to send to CALA newsletter.
- CALA membership dues have not increased over time.
- We need more collaboration.
- Run our own journal to provide a publishing platform for members.
- I have made new friends and we care for each other and check on each other, particularly now.
- In general, I think CALA is getting better and better, much more transparent and caring for its members. That's what I want to say in this meeting. Keep it up!
- Friendship.
- Networking.
- Learn from each other.
- Sense of belonging.

- Legacy transmitting.
- Established a global network.

Question 5: Compared with other library associations (ALA, IFLA, CEAL, ALCTS, APALA, etc.), what do you think CALA can adopt?

- Open to new trend, new change, and global perspectives; make CALA a dynamic, and progressive organization.
- Develop, promote and facilitate professional development & leadership.
- Connect and collaborate with other professional library associations.
- Advocate and committed to diversity, inclusiveness and social justice.
- Achieve organizational excellence, raise visibility.
- Preserve the history and legacy of CALA.
- Reach out to members, committed to service to members.
- Be more proactive, reach out to potential members, and cultivate younger generation leadership.
- Consolidate our efforts in areas that are most important and focus our energy on them; REFORMER is a good example to cultivate younger generation leadership. CALA has too many committees and task forces. CALA needs to be a "moving/flowing organization", always keeping up with what's going on in the field of librarianship; CALA is losing its voice among the ethnic library associations.
- Tend to social justice issues more; APALA is more upfront in social justice issues; local community involvement.
- More mentorship program, starting from library students.
- Expanding mentorship between types of library? Such as public library vs. academic library; or types of job responsibilities. Goal is to attract more people to enroll in the mentorship program.
- CALA is different from ALA but more comparable to APALA in terms of size and structure, for example chapters.
- APALA is more in front of social justice issues. CALA shall do more in this area.
- CALA can do more in connecting members with library professional expertise and service responsibilities (such as adding more break-out programs to CALA's Annual Meeting to encourage more members to attend).
- We have a few paths: we aim to be more inclusive and reflective (possibly changing its name to Chinese and Chinese American Librarians Association so. CCALA to include those who are overseas, outside of USA). The other path includes more engagement with diverse groups, partnering in joint sessions (besides JCLC), such as webinars, conferences, meetings, task-force, engaging with authors/scholars more, outside of librarianship.

Question 6: What improvement can CALA do to meet your expectations?

- CALA members are not very well connected with one another.
- Leadership training.
- Social justice issue involvement; more assertive and strong to defend our heritage.
- Mentor & mentee accountability.
- Take community needs into more consideration.
- Too many board meetings? Maybe simplify the org charts a little?

- Better transition between committees; better documentations; longer committee service terms; staggering committee terms (half new, half old members).
- Utilizing software to help better team work, like basecamp; online meeting between departing committee chairs/members and incoming chairs/members.
- CALA has too many committees? Need to help young members find leadership opportunities.
- Handbook updating.
- Committee procedures can be documented on CALA websites.
- FAQ page to encourage involvement.
- Chapter presidents take more active role.
- Does CALA have a business Zoom account to enable committees/chapters to communicate better? (Note: Just set up a zoom account for CALA).
- Add "Contact us" form to CALA homepage to allow members to express their opinion and make suggestions more easily.
- Develop more professional development program nationally and internationally; create more scholarship opportunities to junior members/library students; fundraising; archive CALA history.
- Other note: CALA Assessment committee is doing assessment survey for CALA webpage, please participate.
- Develop more resources for students and entry level librarians for their professional development and job hunting, especially in this challenging period.
- Promote current programs, such as one year free student membership, mentorship program to students and entry level librarians to support their career development and job searching as well as finding directions for future career.
- Continue to provide committee and other volunteer opportunities for members to gain work related experiences, build and stay connections in the profession.
- In this pandemic situation, many libraries may face budget cuts which would probably lead to cut training and other professional development opportunities for librarians. CALA is currently establishing a virtual space for members to hang out and support each other. CALA shall consider staying agile to support members in unexpected circumstances.
- Create more opportunities for members to share their research interest/projects.

Question 7: What is your long term career goal, and how can CALA help you?

- Promotion to full librarianship.
- Create a space/database of reviewers in different areas so members can find them to support their own promotion to full librarianship, especially in academic libraries.
- Connect professionals with specialized expertise or librarianship, such as business, systems, etc. for sharing and supporting each other.
- Provide archives of recordings or other resources from previous professional development or related programs for members to review whenever they need.
- Use repository as a knowledge base to support members for their professional development, promotion, and renewal and tenure process.
- Provide leadership development opportunities for members.
- Provide editorial, peer-reviewing opportunities using CALA own journal for members to gain academic experience in this area so they would be more prepared to take reviewer or editor roles in other journals in the field.

- Provides timely guide on library professional trends and professional development for how to work in this new environment.
- Continue providing travel grants to support members' professional activities.
- Share expertise among CALA members (membership database could include professional expertise/library job responsibilities).

Question 8: What do you want CALA to be in the next five years?

- Outreach to students in LIS schools to inform CALA resources to them.
- Promote CALA in different conferences to new generations.
- Include more students in committees for students to gain professional experiences and for committees to see students' perspectives.
- Build student chapter or student community to promote CALA to students.
- Provide and promote conference presentations and publications opportunities, especially in this pandemic situation, many members will not go out for professional developments probably in a long time.
- Encourage collaboration among chapters.
- Provide more online training, meetings or other activities - can start now.
- See more international impacts and collaboration with other organizations.
- Initiate professional training in specific areas, like developing programs, etc.
- Make a long term plan or task force for professional training.
- Coordinate and distribute training opportunities from other organizations.
- Compile a list of training opportunities for members.
- Try to balance between focusing on Chinese American librarians in North America and international influence.
- CALA should be the number one association that librarians and library staff should think of globally - when they think about Chinese/China/Chinese American/Chinese diaspora issues and libraries, and connecting our expertise and strengths, including translation work, training, cultural competency training, global networks and more.

About the authors

Wenli Gao is the Data Services Librarian at the University of Houston. She is the CALA president for 2021-2022 and co-chaired the CALA strategic plan task force.

Dr. Raymond Pun is the Education and Outreach Manager at the Hoover Institution, Stanford University. He is the CALA vice president for 2021-2022. He was a member of the CALA strategic plan task force.

Dr. Lian Ruan is the Head Librarian at the Illinois Fire Service Institute, University of Illinois Urbana Champaign and is currently CALA's Executive Director and co-chaired the CALA strategic plan task force.