Strategic Plan for the Freedom to Read Foundation

Approved by the FTRF Board of Trustees January 20, 2012

Assembled by Keith Michael Fiels, Barbara Jones, and Kent Oliver

I. STRATEGIC PLAN FOR THE FREEDOM TO READ FOUNDATION

A. FOUNDING PURPOSE AND MISSION OF FTRF:

According to its Constitution, the purposes of the Foundation are:

(a) To promote and protect freedom of speech and freedom of press as such freedoms are guaranteed by the Constitution and laws of the United States and as such freedoms necessarily involve the public right to hear what is spoken and to read what is written;

(b) To promote the recognition and acceptance of libraries as repositories of the world’s accumulated wisdom and knowledge and to protect the public right of access to such wisdom and knowledge;

(c) To support the right of libraries to include in their collections and to make available to the public any creative work which they may legally secure; and

(d) To supply legal counsel, which counsel may or may not be directly employed by the Foundation, and otherwise to provide support to such libraries and librarians as are suffering legal injustices by reasons of their defense of freedom of speech and freedom of the press as guaranteed by law against efforts to subvert such freedoms through suppression or censorship to the extent such libraries and librarians may request such aid and require it on account of poverty or inability to obtain legal counsel without assistance.

B. VISION

The Freedom to Read Foundation is recognized as a national leader in the defense of the freedom to read, the freedom of speech and the freedom of the press. Librarians are joined in membership and advocacy by authors, booksellers, publishers and all citizens who recognize the importance of First Amendment freedoms. FTRF initiates the defense of the First Amendment in our courts when necessary as well as joining other organizations in litigation. Collaborations
reflect a wide array of political affiliations with the defense of the First Amendment as the common goal.

Legal initiatives and awareness campaigns are supported through a growing funding base generated by member dues, grants and private contributions. Financial support allows for a well staffed and supported foundation business office. As the legal arm of the American Library Association, ALA members are engaged and aware of foundation activities. The FTRF membership base is expanding as a growing number of ALA members join and contribute. A well crafted marketing plan contributes to this expanding membership base while telling the Foundation’s story to the American public.

FTRF supports library based campaigns and celebrations that recognize and promote the right of access along with the diversity of information. First Amendment education campaigns are developed by foundation staff in collaboration with members and the Board. As does the membership, the makeup of the Foundation’s Board reflects a diversity of background and professions. The common bond is the defense against injustices by those who attempt to subvert freedoms through the suppression of information and censorship.

C. FTRF’S ORGANIZATIONAL VALUES:

• FTRF collaborates with individuals and organizations that share a commitment not only to intellectual freedom principles, but also to practical action to defend these principles.

• FTRF engages in and upholds the intellectual rigor of intellectual freedom and other legal and ethical issues.

• FTRF has successfully protected First Amendment principles in the U. S. Supreme Court and other “establishment” institutions. This is a source of great pride and professional satisfaction.

• While FTRF has successfully raised funds for important litigation, this work is not just about money. It is about protecting the freedom to read through advocacy but also through education and public awareness of these issues.

D. STRATEGIC ACTION AREAS:

1. Awareness

2. Litigation

3. Education

4. Engagement

5. Capacity Building
II. GOALS, OBJECTIVES, AND STRATEGIES

A. AWARENESS

Objective 1: Expand FTRF membership base, within the library world.

Strategy 1: Invest in expert assistance to develop marketing strategies.

Strategy 2: Increase awareness, value, and understanding of FTRF within ALA membership. This will be done by (a) revising the opt-in option on the ALA membership form; (b) formal display at ALA conferences; and (c) the FTRF President will appear on all major division board agendas.

Strategy 3: New membership materials for librarians and non-librarians will be developed for social networking and in print form, promoting the Foundation’s value

Objective 2: Expand FTRF membership base, outside the library world.

Strategy 1: Cultivate a stable of celebrities to speak for FTRF.

Strategy 2: Develop a marketing plan to clarify the uniqueness of FTRF.

Strategy 3: Continue to develop an optimistic, positive message that is pro-family and pro-freedom of speech.

Strategy 4: Develop a new newsletter design and a more distinct web presence.

Objective 3: Promote FTRF to ALA leadership.

Strategy 1: Provide an update of current activities.

Strategy 2: Provide information and professional camaraderie through social gatherings and other venues.

B. LITIGATION

Objective 1: Continue to be the premier center of excellence for litigation action and consultation on behalf of intellectual freedom in libraries.

Objective 2: Develop a proactive legal strategy and take the lead in appropriate litigation.

Strategy 1: Determine the budget needed to adopt a proactive legal strategy.

Strategy 2: Enhance information flow with an FTRF Action Network.

Strategy 3: Request Counsel to (a) monitor freedom to read controversies; (b) bring to the Board’s attention those potentially suitable for handling by the Foundation; (c) make a recommendation, based on, inter alia, the fact, the forum, the law, and
the potential impact, as to whether initiation of a lawsuit in connection with a particular dispute would be advisable; and (d) identify appropriate local counsel and possibly co-counsel.

Strategy 4: Continue to monitor anticipated growth in relevant privacy litigation, including e-books and other developing technology related to content delivery.

C. EDUCATION

Objective 1: Develop an FTRF web site as a platform for educational and other initiatives.

Objective 2: Work with ALISE on further integration and inclusion of intellectual freedom in the LIS curriculum.

Objective 3: Continue Lawyers for Libraries, now in a webinar format, and a webinar series for attorneys who are not First Amendment specialists.

Objective 4: Consider conference programs at ALA and state conventions.

Objective 5: Monitor opportunities for education in the new digital environment, especially in the area of reader privacy, e-books, and related issues. This work will be coordinated with the work of the IFC Privacy Subcommittee and the new ALA Subgroup on Privacy (part of the Digital Content Working Group).

D. ENGAGEMENT

Objective 1: Identify and mentor the next generation of FTRF leaders.

Objective 2: Increase Board involvement.

Strategy 1: Appoint FTRF liaisons to key association committees.

Strategy 2: Invite division and other unit liaisons to attend FTRF meetings.

Strategy 3: Expand Nominating Committee’s role to include nominating the slate for the FTRF Executive Committee.

Strategy 4: Continue the already successful “emerging issues” discussions and follow up and possibly refer such issues to the IFC for consideration.

Strategy 5: Identify activities for more active engagement of FTRF Board with the membership.

Objective 3: Evaluate collaborative opportunities with current and future organizations.

Strategy 1: Continue to re-evaluate FTRF’s relationships with collaborators.
Strategy 2: Establish new relationships with different organizations, specifically with ALA chapters, ALISE, and law school graduates.

Strategy 3: Continue our strong ties to the bookselling and publishing community.

E. CAPACITY BUILDING

Objective 1: Increase FTRF staffing in order to achieve key action areas. Consider such additional organizational positions as legal consultant, membership specialist; communications specialist; and program planner.

Objective 2: Upgrade office technology to keep track of membership and other office functions.

Objective 3: Double the FTRF endowment by 2015.

Strategy 1: Invest in expert assistance to analyze fundraising potential, in order to (a) determine feasible capacity to pursue grants and the realistic proportion of support that could be achieved through grants; (b) identify possible funders in order to prepare proposals.

Strategy 2: Establish Advisory Committee to jumpstart fundraising or capital campaign efforts.

Strategy 3: Develop sustainable operation for fundraising including ongoing donor stewardship and realistic expectations of support that is achievable.
A. Background and History of Strategic Plan Development

Background Information for Strategic Planning

On Monday, October 4, 2010, the Executive Committee of the Freedom to Read Foundation met before the Board Retreat to discuss some confidential personnel issues and some budget issues. Attending were: Kent Oliver (President), Judith Platt (Vice President), Susan Hildreth (Treasurer), Candace Morgan and Robert P. Doyle (Executive Committee), Barbara Jones (Executive Director), and Jonathan Kelley (Program Coordinator). In the morning we consulted with Lori Williamson, Associate Vice Chancellor for Institutional Advancement at the University of Illinois at Urbana-Champaign. The group sought Ms. Williamson’s perspectives from her experiences at UIUC’s Development Office and from her service on various boards.

In the afternoon the group analyzed FTRF budget and investment data from recent reports and discussed ways to present this data in the most meaningful and understandable format. We also discussed the agenda for Tuesday’s Board Retreat. The group adjourned for dinner with the entire FTRF Board that evening.

Then on Tuesday, October 5, 2010, the FTRF Board began formal strategic planning. They met with Dan Wiseman of Wiseman Consulting, Inc., of Chicago, who facilitated the one-day retreat. Attending were: Kent Oliver, Judith Platt, Susan Hildreth, Bernadine Abbott Hoduski, Jonathan Bloom, Robert P. Doyle, Keith Michael Fiels (ALA Executive Director), Julius Jefferson (ALA IFC Chair), Mary Minow (Trustee), Candace Morgan, Molly Raphael (ALA President-Elect), Roberta Stevens (ALA President), Barbara Jones (Executive Director), Theresa Chmara (General Counsel), and Jonathan Kelley (Program Coordinator).

The retreat group broke out into several groups to address issues to be included in the strategic plan. A draft was then presented and discussed in New Orleans (see below). As a result of that meeting Keith Michael Fiels, Barbara Jones, and Kent Oliver met in Chicago on November 11, 2011 to restructure the information (nothing was left out or added, but elements moved around). This draft is a result of the Nov. 11 deliberations.

B. SWOT Analysis

Strengths

- FTRF has forty years of stability with established bylaws, a continued positive investment record, strong coalition partners, and a passionate, talented Board, many of whom have served numerous terms.
- FTRF’s niche—the freedom to read—is unique among civil liberties institutions and attracts members and the public interest.
• FTRF’s relationship with the American Library Association does cause some overlap in the Office for Intellectual Freedom, but avoids duplication of effort.

**Weaknesses**

• FTRF is perceived as too “clubby” and closed to new generations of members.

• FTRF’s board lacks ethnic diversity, despite attempts to change this pattern.

• FTRF’s .6 FTE staff is inadequate to generate growth of the organization. It is barely sufficient to maintain the basic operational goals.

• FTRF’s limited financial resources resign FTRF to a “reactive” strategy, in which we are resigned to joining amicus briefs instead of actively seeking those cases that affect libraries directly. This can lead to unclear identity and diffuse activity.

• FTRF has not used its members’ talents and capacity as effectively as possible.

• FTRF’s relationship to ALA can be a strength but also a weakness.

**Opportunities**

• FTRF could anticipate issues and be more proactive and solve problems before litigation.

• FTRF could seek lots of potential members, including non-ALA people and library school students.

• FTRF could mobilize existing members.

**Threats**

• FTRF faces bitter and divisive political discourse in the U.S. currently, with public indifference or hostility toward the First Amendment.

• FTRF message therefore doesn’t resonate with the public and is sometimes perceived as “anti-family.” Lots of misinformation is perpetuated by the 24/7 media cycle.

• E-book and other library vendors ignore privacy issues—a symptom of the overall public, corporate, and often government indifference toward privacy.

• Librarians often view FTRF as an irritant and outside interference.

**C. Regularly Scheduled Review**

Per a vote at the 2012 Midwinter Meeting, the Board of Trustees agreed to review this document at regular intervals to determine progress made toward the goals contained herein.