

CRL Strategic Directions: 2027-2030

Framework and Mindset

Contents

Contents	2
Executive Summary.....	3
Introduction	5
Strategic Framework	7
1. Increasing Resilience.....	7
2. Coordinating Collections and Content	7
3. Unifying Services and Stewardship	7
4. Taking Practical Action Together	8
Strategy Notes.....	8
On increasing resilience	8
On coordinating collections and content	8
On unifying services and stewardship.....	9
On taking practical action together.....	9
Strategic Mindset.....	10
CRL's Value Model	10
Assessing Value	11
Persistent Value: Grow and Shape	11
Annual Value: Use, Improve, Engage, Save	11
Looking Ahead	12
Insights that Shape This Plan	13
Acknowledgements	15

Executive Summary

CRL Strategic Directions 2027–2030 compiles a set of concise overviews of each element of our strategy work to date. These include a framework approved by the Board and implementation notes on that framework; the evaluative mindset guiding our choices; and a review of the evidence that shaped this plan. Together, these create a foundation for working with members and experts to define concrete initiatives that will round out the strategic plan presented for approval at the 2026 Annual Business Meeting.

CRL is building a responsive strategic plan at a moment when research libraries face growing costs, rising expectations, and pressure on both local and shared infrastructure. Members have been clear about what they need from CRL: thoughtful coordination of collections and content, a stronger position in a challenging information marketplace, clearer alignment among services, and practical ways to work together across roles and institutions.

The strategic framework answers those needs through four areas of focus that begin with the keystone concept of increasing resilience and achieve that through strategic development of CRL’s core strengths and capabilities:

- 1. Increasing Resilience:** countering resource strains by pooling leverage, insight, and infrastructure. Through shared services, market intelligence, and coordinated action with members and across consortia, CRL will work to level the playing field for all.
- 2. Coordinating Collections and Content:** strengthening CRL’s role as a steward of global research materials and a broker in the information marketplace. This includes improving discovery and use of content, advancing shared print as a collections and access architecture, and support for collective collection efforts.
- 3. Unifying Services and Stewardship:** CRL will integrate its long-term commitments to preservation with the present-tense services that make a difference. Investments in services, metadata, and infrastructure will ensure that collections and services reinforce one another and remain sustainable.
- 4. Taking Practical Action Together:** CRL will expand opportunities for library staff to build skills, connect with peers, and deliver visible results with practical impact. This includes clearer

structures for participation and stronger storytelling about the impact of shared action.

The strategic mindset paired with this framework guides how CRL will select and shape initiatives. It focuses on delivering both persistent value—growing and shaping the shared scholarly record and the marketplace we operate in—and delivering measurable value each and every year, through services that help members use resources, improve conditions in our sector, engage with peers, and save time or money.

Over the coming months, CRL will work with members to develop a set of time-bound initiatives that put this framework into practice. Those initiatives will form the core of the strategic plan for FY2027–2030 and will be presented alongside the FY2027 budget, giving members a clear view of how collective investments become concrete action and measurable progress.

Introduction

This document—*CRL Strategic Directions 2027–2030*—brings together the strategic framework approved by the CRL Board of Directors in November 2025, strategy notes to guide its implementation, and the strategic mindset CRL staff will use to evaluate and shape potential initiatives.

With this in place, CRL will begin gathering and reviewing ideas for concrete activities in the next planning period. Together, the framework, mindset, and selected initiatives will form CRL’s strategic plan. The goal is to give members a clear understanding of where their investment will make a difference and how that impact will be achieved and assessed.

The materials in this document draw on a wide base of information:

- CRL’s new mission, vision, and values
- Strategy forums at the 2025 Annual Business Meeting
- Listening sessions and site visits with roughly 50 member libraries
- Conversations with non-member partners, including consortia, scholarly societies, government, and prospective members.
- A member and stakeholder survey that reached 249 respondents, about half of the CRL membership, more than doubling the previous response rate.

Throughout this work, the CRL Board and its committees have offered essential guidance, and our members have offered crucial insights.

The strategic framework describes areas where CRL intends to make a difference over the next several years and the approaches required to make progress. A strong framework focuses on issues that can be meaningfully shaped through coordinated effort, so that each successive plan shows visible progress as CRL addresses challenges, resolves them, and identifies those that should come next.

The strategic mindset provides the criteria for evaluating CRL’s choices. It guards against mission drift and grounds CRL’s value proposition. Using this mindset to test proposed initiatives for the strategic plan—and the opportunities and challenges that will arise in the years ahead—ensures that our plans stay aligned with member priorities.

With the framework and mindset drafted, CRL will now turn to developing a set of time-bound initiatives for FY2027–2030. These initiatives will outline the investments CRL plans to make, and the specific actions members can expect. As we develop those initiatives, we expect to further refine the strategic framework and assessment criteria presented here, to ensure that CRL leadership is aligned with our members on how we direct and evaluate this organization. The completed plan will accompany the proposed FY2027 budget at the next business meeting, giving members a clear, connected view of how dues translate into a program of work with real impact.

Strategic Framework

The following four principles reflect the key themes emerging from CRL's strategic planning assessments. They describe the characteristics CRL will strengthen in its next strategic plan, defining where we will focus our attention, resources, and partnerships to deliver results. Strategy notes for each element describe how CRL should take action in these areas.

The elements of this framework substantially reaffirm CRL's enduring purposes and priorities. CRL must respond to today's challenges and opportunities in ways that align with the present moment and deliver visible value to its members and ultimately make our community more resilient.

1. Increasing Resilience

CRL will help research libraries withstand financial and technological pressures by pooling leverage, insight, and infrastructure, using collective strength to hedge against market consolidation and digital disruption. Through shared investment and coordinated action, CRL will level the playing field and ensure that every member benefits from the tools, data, and partnerships shaping the next generation of research infrastructure.

2. Coordinating Collections and Content

CRL will evolve from primarily housing research materials to sustaining comprehensive access, through its global collections, coordinated collective stewardship, and equitable licensing in the content marketplace by integrating negotiation, preservation, and shared infrastructure with the content, metadata, and delivery systems research libraries rely on. CRL's resource sharing systems are core components of the collective collection, ensuring reliable access to materials regardless of location or format.

3. Unifying Services and Stewardship

CRL's services will grow from its long-term commitments to preservation, delivering the collections and services members value today while sustaining the infrastructure that supports research tomorrow. Through global partnerships and shared expertise, CRL will invest in the continuity, metadata, and preservation systems that anchor the scholarly record and ensure member investments endure.

4. Taking Practical Action Together

Across every part of the framework, CRL needs to be a place where library staff build skills, networks, and tangible achievements through collective work that advances the profession. Distinct from other associations, CRL offers members the chance to shape the solutions and make the investments that define research libraries in practice. By engaging staff across roles and career stages, CRL strengthens its community while preparing the next generation of library leaders. By partnering with other organizations, CRL helps rationalize collective investments and advance shared interests.

Strategy Notes

Strategy notes describe how CRL should translate the framework into day-to-day practice. They serve as decision-making criteria and as guidelines for judging the potential of any initiative to deliver meaningful results.

On increasing resilience

- Actively identify inefficiencies that can be solved through scale and shared services.
- Guide members in testing and adopting new, more sustainable operating models.
- Lead partnerships across consortia and allied organizations to improve coherence and value across the consortium landscape.
- Use and improve resource sharing systems to reduce the need for duplication, improve turnaround times, and ensure continuity of access during disruption.

On coordinating collections and content

- Invest in services, marketing and education, and infrastructure that help members discover and use content.
- Advance shared print towards a sustainable, continent-wide service model in partnership with other shared print programs.
- Improve the scope and quality of metadata that is available for collective decision-making and develop decision support services around these resources.
- Prioritize initiatives that strengthen global access to information and take on work that is valuable to scholarship but unsustainable for any institution to manage alone.

On unifying services and stewardship

- CRL is at risk if it only serves a long-term goal and needs to demonstrate present-tense value and relevance.
- Focus on opportunities that derive from and add value to long-term objectives, so new offerings strengthen rather than distract from CRL's mission.
- Maintain a distinct role and value proposition in a competitive landscape of membership organizations.

On taking practical action together

- Establish CRL as a dependable resource in members' day-to-day professional landscape across multiple roles and functions.
- Structure participation so members shape, guide, and evaluate while CRL staff carry through the work of build-out and execution.
- Use communication and storytelling to highlight the outcomes of engagement and show how collective effort delivers shared value.

Strategic Mindset

CRL's Value Model

To capitalize on CRL's potential, we need a clear strategy and a clear sense of how that strategy creates value. CRL delivers value in two dimensions:

- **Persistent value:** the long-term, cumulative benefit of the content we preserve and make available through collections and infrastructure.
- **Annual value:** the benefit realized each year through the resources, services, and collective action that extend the reach of every member.

Both matter, and both deserve to be visible. Some of that visibility comes through **quantitative measures** that track performance over time. Over the coming years, developing a robust culture of quantitative assessment is crucial for CRL to ensure this is an effective and sustainable enterprise, but those numbers do not always do a good job conveying value outside our operational context. Making our value visible and comprehensive comes through **illustrative examples**, stories that show CRL's impact in practice.

We find it useful to describe CRL's role in three ways:

- **Hub:** a central point where members connect, share knowledge, and set direction.
- **Broker:** enabling coordinated action to achieve things no one library could or should do alone.
- **Contributor:** putting our unique expertise and resources to work where there are gaps or challenges.

In that sense, CRL is how the research library community makes stewardship both fair and affordable. Our collective solutions take three main forms:

- **Collect:** taking on the full cost of stewardship for materials that have scholarly value but limited market or reputational value.
- **Coordinate:** helping members distribute the costs of stewardship, especially for materials too complex or diffuse for one institution to sustain, and obtain optimal contract terms.
- **Negotiate:** securing the best costs and terms for resources with active market value, including ensuring that stewardship obligations are met by those who profit from providing access.

Assessing Value

Members should not have to do complicated parts-worth assessment to understand CRL's value. Our expectation for this organization is that the return feels worthwhile for any dimension of our work—collections, licensing, infrastructure, collaboration. When CRL delivers that kind of value across multiple dimensions at once, membership becomes not just a good investment but also the best one a research library can make.

Persistent Value: Grow and Shape

Persistent value is the equity we build together over time. CRL **grows** value by acquiring and preserving collections, making them discoverable and usable, and ensuring they are put to work in research. We **shape** value by building coalitions around preservation, access, equity, and sustainability, and by influencing how the information marketplace evolves. There are two crucial factors for growing and shaping the persistent value of CRL:

1. CRL provides or enables access to more content than they could achieve on their own.
2. CRL ensures that this content is worth having—selected, acquired, and sustained according to priorities established with member advisory groups.

Annual Value: Use, Improve, Engage, Save

Annual value is the tangible return within the year. CRL pays dividends on your long-term investment in four principal ways:

- **Use:** access to CRL's collections, licenses, and services, delivering consistent cost advantages.
- **Improve:** targeted work that changes conditions—better license models, cleaner metadata, sharper collection analyses.
- **Engage:** participation in committees, projects, and convenings that strengthen the network and build shared capacity.
- **Save:** reducing direct costs or staff time by acting collectively while keeping more resources under local control.

CRL makes its full range of services available to every member and works with you to align them to your strategic goals, so you can draw on CRL's support in the ways that make the most sense for your own strategic goals.

Looking Ahead

CRL will now begin developing a set of time-bound initiatives that put this framework into action. Over the coming months, we will work with members to refine priorities, test options, and identify the specific activities that will make the greatest difference over the coming years. Those initiatives will shape CRL's program of work for FY2027–2030 and will be presented alongside the FY2027 budget for member approval.

The goal is to turn the framework and mindset in this document into practical, achievable work that delivers visible progress for the community. Members will play a central role in shaping these initiatives and ensuring they reflect shared needs, ambitions, and expectations. Throughout the end of 2025 and the early months of 2026, we will seek guidance from our committees, our Board, and open forums that allow for broad member participation.

Insights that Shape This Plan

CRL's strategic framework and mindset grew out of extensive engagement across the membership and the broader research library community. Including strategy forums at our annual business meeting, site visits and listening sessions, and a member and stakeholder survey.

Across these assessments, our principal goal has been to understand how our members perceive our collective professional environment, so that we can target CRL's strategic plan on activities that will give our members an advantage in the current landscape. To succeed at that, we have also asked our members what they value about and expect from CRL, so that across the scope of possible advantageous activities, we align our efforts to the ones that our members most want us to take on.

Members offered a clear picture of the pressures facing research libraries and the opportunities where CRL can make a decisive difference. Three interlinked themes emerged consistently:

Members need stronger coordination across collections and content.

Libraries face growing difficulty sustaining both local and shared stewardship obligations while managing the costs of licensed resources needed by their users. Members see CRL as uniquely positioned to help them navigate this pressure—through shared print, clearer acquisition priorities, better metadata for collective decisions, and stronger leverage in the content marketplace.

Resilience depends on scale, shared infrastructure, and more coherent

collaboration. Institutions are looking for ways to manage risk, hedge against market consolidation, and avoid duplicating effort where no competitive advantage exists. Members emphasized that CRL's independence and broad membership give it an unusual capacity to organize action across consortia and help rationalize collective investments. In our framework, we break this into two parts recognizing the need to develop new capabilities and the necessity of re-integrating those into a sustainable organization with a coherent, consistent mission.

Staff want meaningful ways to participate in work that builds skills and produces visible results. Across roles and career stages, members

expressed interest in engagement that leads to tangible outcomes, not just discussion. Many librarians move across institutions at career inflection points, and the talent pipeline across our profession requires early and mid-career libraries to have opportunities to develop networks beyond their institutional walls and gain experience that supplements their specific position descriptions. CRL has been a venue where librarians in certain career tracks can make a practical contribution that strengthens and enlarges their own professional expertise while advancing shared goals for the community. There is a mutually beneficial opportunity to expand and intentionally structure this type of participation.

These insights shaped the framework in direct ways. They informed our emphasis on coordinating collections and content, led us to sharpen our focus on resilience and shared services, and pointed toward a clearer, more purposeful approach to participation and professional development. They also reinforced the importance of aligning CRL's services and stewardship commitments so that long-term responsibilities support present-tense value.

With approximately 200 member libraries and thousands of member staff, CRL is a diverse and complex community. To understand member needs, concerns, and aspirations, we convened strategy forums following the 2025 Annual Business Meeting, met with approximately 50 member library leadership teams and hundreds of staff through site visits and online listening sessions, and conducted a member and stakeholder survey, which drew 248 responses. These included more than half of CRL's institutional membership: compared to our previous member survey, this was more than double our previous institutional response rate and more triple the overall response rate. Respondents included over half of our member libraries' directors and perspectives from stakeholders with a variety of professional roles and degrees of familiarity with CRL.

Taken together, this feedback forms the evidence base for the strategic plan. It clarifies where members see the greatest need, where CRL can create the most impact, and how our collective work can help strengthen the research library ecosystem under increasingly challenging conditions.

Acknowledgements

This document reflects the insight and generosity of a legion of colleagues across the CRL community.

I want to first recognize the CRL Board for its steady guidance. They have given me the latitude to explore what CRL needs while offering clear, incisive counsel whenever it mattered most. Dr. Carla Hayden, J. Mark Sweeney, Kate Zwaard and Brian Schottlaender round out a list of people whose example and advice have been invaluable to me as I set my focus on what CRL can be.

My thanks as well to CRL's leadership team. They have shouldered a demanding year—maintaining day-to-day operations, onboarding a new president, and taking on early organizational changes—while also seeking out challenges and addressing them with creativity. Their work sets a strong foundation for what's ahead.

I am grateful for the conversations I had this summer with colleagues in Ireland, the UK, and Germany. Thanks to the hospitality of CONUL, RLUK, and the Staatsbibliothek zu Berlin, I had the chance to explain CRL's story in a different context, which sharpened my understanding of CRL's role and value.

I also appreciate the time and openness of directors from library associations, consortia, and scholarly societies across North America. Without listing everyone—and inevitably leaving someone out—I want to thank Andrew Pace and Judy Ruttenberg at ARL and Katherine Skinner and Sarah Lippincott for their work to strengthen consortial collaboration; Joy Connolly and Camilo Villalpando at ACLS and colleagues at the ACLS CEO for their perspective on the academy; and Claire Appavoo and Craig Olsvik at CRKN for deepening my understanding of the needs and opportunities within our Canadian membership.

Finally, I want to thank the many members across the U.S. and Canada who have made time for calls, meetings, and campus visits. Your engagement has accelerated my learning and shaped this work. I look forward to continuing those conversations.

—Jacob Nadal

President, Center for Research Libraries