Presenter Name: Robin Kear, Liaison Librarian, and Aaron Brenner, Coordinator of Digital Scholarship, University Library System, University of Pittsburgh

Session Title: A Catalyst for Connections: A Collaborative Strategic Planning Process

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What are the first words that come to your mind when you think of ‘strategic planning’?
Participants: Click on the press down and move your mouse to expand a text box on the this slide, and type in the text box (or type in the chat box)
Our Story

• University Library System (185 employees) at the University of Pittsburgh

• In 2011, under the guidance of Karen Calhoun, we started a new planning story
Our Motivations to Change

• Low awareness of yearly goals
• No path for horizontal or bottom-up contributions (ideas had to get passed up the org chart)
• Time of rapid change & repositioning
• Need for greater ownership of actions, ability to lead from the broad middle
Our Values for Planning

• Participatory, inclusive, transparent

• Engage the entire organization with planning *and* its results

• A lifecycle model
  • planning year has distinct stages
  • repeats yearly
  • mix of continuity and new participants

• Why yearly? To create an agile organization in a time of change.
What Does Our Process Look Like?

• Planning and budget committee elected / appointed
• PBC Team building
• All staff kickoff with outside speaker
• PBC conducts environmental scans
• All staff planning input event
  • Future search, Birds of a Feather, Poster Session
• PBC drafts strategic options
• All staff review, prioritization of options
• With senior staff approval, options become next FY actions
Planning Kickoff Speakers

[Images of speakers]
All Staff Planning Events
One Voice on Collaboration

“I have witnessed the dramatic change in how yearly goals are formulated and executed within the ULS. It has been a great experience to be a part of this transformation and play a small role in creating what we now call ‘strategic options.’

By serving on the PBC, I have been provided with a broad perspective of activities within the ULS as well as the individuals who work so hard to make them happen.”

- Planning and Budget Committee Member 2011-15
Why are you in our session?

A. I am expected to lead or do strategic planning.
B. I want to work on collaboration in my organization.
C. Our planning is terrible, last-minute, and/or top-down.
D. I want to improve our strategic planning.
E. None of the above (please use chat box)

Participants: Click on the near your name. Select your choice (or type in the chat box)
“I love to learn new things, and the PBC provides not only a great educational opportunity but a chance to make positive contributions to improve our organization. It was a good experience to participate in such a highly collaborative group and to work with and learn from so many colleagues.”

- Planning and Budget Committee Member 2014-16
Positive Collaborative Outcomes

• Informal internal communication greatly improved

• Examples:
  • Internal partnership with Special Collections and Liaisons
  • External connections Archives-Student Affairs, RES – Student Affairs, RES – Office of International Services
  • EZ-Proxy improvement implemented amid obstacles in Information Technology
  • 24/5 hours at main library, asked for by students, given priority and implemented
One Voice on Collaboration

“I have to admit that I was initially skeptical of the increased emphasis on the planning process that started several years back. In light of that, I would have to say that being on the committee has been an eye opening and rewarding experience in that you collaborate with staff from different departments and I now appreciate how hard the committee works to solicit ideas and participation from the ULS as a whole.”

- Planning and Budget Committee Member 2014-16
Challenges to Collaboration

• A venue for recurring issues that are not addressed, which can lead to changes slowly

• Rationale needed for non-approval of ideas which is not always given
  • Some asks are simply not done
  • Some might give up on the process

• Complex structure of the planning process
  • Planning fatigue in a yearly cycle
What is the level of staff participation in your planning process?

A. Everyone is or has the opportunity to be involved.
B. Only our administration thinks about strategic planning.
C. A few key individuals but not everyone.
D. Upper and middle management are involved.
E. I don’t know.

Participants: Click on the near your name. Select your choice (or type in the chat box)
One Voice for Collaboration

“The PBC has been a great tool not only for bringing ideas to the table and having a real impact on library planning, but for fostering relationships across the organization that otherwise would have been a real challenge. PBC alumni take away friendships with people from across the ULS, and those friendships help us all build bridges for collaboration moving forward.”

- Planning and Budget Committee Member 2011-15
Surprise Internal Benefits

- Acculturation into the library community
- Empowerment to make internal connections, pick up the phone, and email across the organization
- Empowerment to speak up and feel heard
- Middle managers feel empowered to go ahead and do projects anyway
- Productive outlet for venting; affirmative dialogue
- Improved current awareness from outside speakers and open environmental scans
One Voice for Collaboration

“I've been on the PBC for four years...the best part of the PBC is that it allows me to participate in ULS-wide goal setting. I get to have a say, put forth ideas, try to make a case for them, and see if I can help move them forward. I don't have to stick with just the issues and options that relate directly to my job but can participate in other initiatives that interest me.

I think it is time incredibly well spent--for me, professionally, but more importantly, for ULS service to and support of the university's teaching, learning, and research efforts.”

- Planning and Budget Committee Member 2011-15
Positive External Outcomes

- Feedback ‘Best plan that they had seen’ from Provost to Director
- Education of library value to external university community
  - Adds to library credibility
- Ahead of our university’s planning curve, easy to take advantage of our new university-wide participatory planning process
- Evidence of stronger rationale to support the library’s strategic goals
“My year serving on the PBC has helped me to gain a better understanding of the ULS as a whole and the planning process. Participating in meetings, events, and subcommittees within the PBC has increased my understanding of our system as well as my confidence and ability to articulate ideas within my own work area.

One of the most valuable aspects has been collaborating with colleagues from many areas of the ULS to learn more about their work and departments through our weekly meetings and environmental scans.

I've also appreciated being able to see results of my participation by watching my own small ideas evolve and grow into an environmental scan and eventually become part of an approved option for next year.”

- Planning and Budget Committee Member 2014-16
Making planning a collective process in your organization

• A diverse, rotating, and majority elected planning committee
• All-staff events for input and discussion
• Include outside speakers, other campus or regional perspectives
• Commitment and support from leadership
• Work hard to communicate the process, the voices of participants, the results, and the impact
• Celebrate your hard work and successes!
Based on what you have heard today, is participatory planning worth trying in your organization? How can you start?
Participants: Click on the bold, press down and move your mouse to expand a text box on the this slide, and type in the text box (or type in the chat box)
Questions? Thank you!

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