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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



Illuminated Cathedral of Learning 2008,  
University of Pittsburgh, Innovation  
Institute

# 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



# 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)

# One Voice on Collaboration

“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

# One Voice for Collaboration

“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?

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# Questions? Thank you!

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