You Can do This!
Designing collaborative strategic planning to engage your community and your library

Robin Kear
Liaison Librarian
University Library System, University of Pittsburgh
rk25@pitt.edu

Eve Wider
Director, Owen Library
University of Pittsburgh at Johnstown
ewider@pitt.edu

Aaron Brenner
Coordinator of Digital Scholarship
University Library System, University of Pittsburgh
abrenner@pitt.edu

The University of Pittsburgh University Library System (USA) completely revamped their strategic planning process in 5 years and here is how you can too:

Model these values:
- Participatory, inclusive, and transparent
- Engagement of all library staff (ownership is collective)
- Open-mindedness without judgement

To avoid
- “we have always done it this way,”
- “that will never work,”
- “we already tried that,”
- “we don’t have the money/staff”

- Change is welcome
  (iterations are expected)
- Remember to have fun

Try these techniques:
- Environmental scanning
- Project model — reconsidered / chartered each cycle, opportunities to be responsive to current issues, modify the structure, etc.
- Engagement with outside groups — from the university; outside research groups; outside speaker of prominence

- Fresh perspectives

- Multiple all staff events to gather new ideas and input, discuss proposed options, present plan

- Discussion forums
- Poster sessions

Prepare for these challenges:
- Time commitment
- Expectations of participants
- Exposes organizational fault lines / tension between staff and administration
- Challenge to communicate all ideas, activities, outcomes
- Maintain: transformative at first, but ongoing is difficult
- Senior administration commitment

Pursue these outcomes:
- Shared ownership & understanding of the direction of your library
- Collaboration and Connections
- Internal transformation
- On-boarding effect for new staff
- Improved communication

"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 collaborative conversation, and especially in questions of strategy, has been an eye-opening experience for me. It is a cycle of sharing ideas within my own work area. One of the most valuable aspects has been collaborating with colleagues from many areas of the ULS to explore divergent ideas and perspectives. I’ve also appreciated being able to see the majority of my participation growing my own small ideas evolve and grow into a meaningful plan and eventually become part of an approved option for next year."

"Over the last four years, I have achieved dynamic 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.' 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."

"I didn’t feel like there are more opportunities to influence the course [of ULS]. I think I work with a lot of people who have a lot of great ideas but there are not a lot of opportunities to pursue those."

"What I love most about the PBC is that everyone in the ULS has a voice. And there’s a process that moves from light-bulb moments of individual thoughts to discovering collective solutions."

Source: ELIIS, Yale University Librarian, opening at all staff planning event

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Thanks to Director Emeritus Rush Miller for recognizing the need to change, and consistently giving support to the process and the people involved.

Thanks to phone Callie urges former USA-NUC for Organizational Development and Strategic Initiatives for creating an inclusive structure for this change to happen and continue to evolve at the University and the USA changes.

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