You Can do This!

Designing collaborative strategic planning to engage your community and your library

Robin Kear

Eve Wider

Liaison Librarian University Library System, University of Pittsburgh rlk25@pitt.edu

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

"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."

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

"What I love most about PBC is that everyone in the ULS has a voice. And there's a process that moves from highlighting lots of individual thoughts to discovering collective concerns."

> Multiple all staff events to gather



Prepare for these challenges:

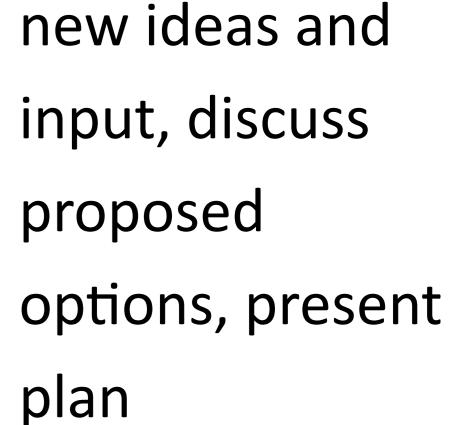


"I don't feel like there are more opportunities to influence the course [of ULS]. I think I work with a lot of people who have a lot of great ideas but there are not a lot of opportunities to pursue



Susan Gibbons, Yale University Librarian, speaking at all-staff planning event

- **Discussion forums**
- Poster sessions





Pursue these outcomes:

- "Over the last four years...I have witnessed the dramatic change in how yearly goals are formulated and executed within the
- Shared ownership & understanding of the direction of your library
- **Collaboration and Connections**

those."

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

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 hap-

pen."

- Internal transformation
- On-boarding effect for new staff
- Improved communication



RESOURCES | TECHNOLOGY | EXPERTISE

University of Pittsburgh

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 Karen Calhoun former ULS AUL for Organizational Development and Strategic Initiatives for creating an inclusive structure for the change to happen and continue to evolve as the University and the ULS changes.

