Slide 1: Introduction, A201: Using Research for Strategic Priorities & Innovation

Slide 2: Strategic Planning at the ULS. This is a yearly cycle to produce strategic actions. I have chaired this process for two years with two different teams, a mix of elected (the majority) and appointed members. The planning structure, a Planning and Budget Committee with a final report due to our provost, had always existed as part of the university's planning and budget system but was greatly enhanced by the work of Karen Calhoun, a short-term AUL for Organizational Change, and Rush Miller, our now retired Director. It has made us think differently about change and engaged us to help shape our future. We consistently have a 60% engagement rate among 185 staff.

There are many tensions in our process. We have deliberate divergence and a quick convergence. Competing demands arise outside the planning process. Staff and administration sometimes have different priorities. We navigate these as best we can and try to pull everything in so it stays relevant. The process is flexible enough to change as needed and it is able to absorb uncertainties by remaining steady. There are many presentation and feedback points along the way.

Our planning cycle runs from early-June to late-February. The actions are followed the in an action plan with quarterly updates and an accomplishments report.

Slide 3: An important part of our planning process is to conduct environmental scanning to help us understand the academic environment in which we operate. Staff education that fosters thoughtful suggestions is critical to our participatory aspects. As part of this process, we have always invited a prominent speaker from outside our library to address a current issue or topic but I decided to have a few additional, open environmental scanning talks.

We most often use open research reports in this process: ACRL top trends and environmental scans, NMC Horizon Report, Ithaka S+R reports, Pew research reports, the Information Literacy Project reports, ARL reports, and other open material. We analyze trends ourselves and present within the group but I thought why not have the researchers speak to us and have a discussion.

Slide 4: How does Lynn's work relate to our strategic planning process? Here is my visitor/resident map from a May 2015 joint workshop with Carnegie Mellon University (CMU) and Pitt librarians. All 3 researchers were there, David White, Lynn Silipigni Connaway, and Donna Lanclos, at the invitation of Keith Webster, dean of CMU Libraries. I was a participant in the workshop and realized the use this research could have to help us understand our student population and their interaction with the library and their disciplines.

Slide 5: The next month we invited Lynn to present different aspects of this research to our library system and it was sponsored by the Planning and Budget Committee as part of our environmental scanning. We were very interested in the aspects of the group's research that dealt specifically with analysis of faculty and student visitor/resident maps. Any work on faculty or student information by disciplines was also interesting to us. We wondered if there was any analysis they had done in these areas that could assist us in our strategic planning process. We had 60 attendees at the talk.

Slide 6: In our all-staff discussion event to solicit input from everyone, we define topics so that groups have a common interest and starting point. Alas, we had some respondents pick the open scanning, but not enough in the first tier for its own group. So, we combined it with another group.

Besides Lynn's talk, we had another open scan by another researcher at OCLC last summer, Brian Lavoie. He was lead author on a recent OCLC publication titled [The Evolving Scholarly Record](#).

Slide 7: The topics that we had presented earlier as part of the environmental scanning were picked up and threaded into the discussion groups. The way we structure this event, the groups have a theme but pick out their top 3 ideas to present at a group poster session. I then analyze this for an open report that is another input for the planning group. I believe that Lynn's research came out the strongest in the posters about undergraduates.

In this poster you can see the theory, students do not live in email, but they might live in text messaging.

Slide 8: Another example of where to apply Lynn's research came out the strongest in the posters about undergraduates.

Slide 9: Those two poster threads and other ideas weaved into this option proposal on connecting with undergraduates. We want to embrace the 'living room' that our library has become. To accomplish this option, we want to introduce participatory design methods, which will hopefully include Visitor + Resident mapping to understand where our users live online. We would then target services to where students are 'resident'.

Slide 10: That one-page strategic option proposal made it to our all-staff presentation event of our most likely candidates for strategic action.

Slide 11: The list of strategic actions and the report that is sent to our provost is the culmination of the work of the planning and budget committee. This idea has become a strategic action to be implemented in fiscal year 2017, starting this June. This particular strategic action will be a place for us to apply the Visitor + Resident research.

Slide 12: My hope is that you can see the impact that this research and others can have on our strategic planning cycle, in the environmental scanning, all-staff discussion event, writing strategic options, all-staff presentation event, and strategic actions. This one piece of research is a microcosm of how research influences us in the thinking process but also, in this case, how we can actually apply it in the action stage.

10:00 a.m. - 10:45 a.m.

Dr. Lynn Silipigni Connaway, Senior Research Scientist, Research, OCLC Robin Kear, Liaison Librarian, University Library System, University of Pittsburgh

The academic community has many ways to engage in the information environment, making academic resources in both physical and digital formats only one option among many. Institutionally provided resources, such as those provided by libraries, often are not the academic community's first choices. They often choose the more convenient, easier-to-use, open access sources. In order to create a library environment centered on user needs and habits, and to provide services and systems of value, it is necessary to identify how, why, and under what circumstances individuals use the various available systems and services. Get the results of some great research and learn how it was used for brainstorming, discussion, prioritization, and planning.