

STRATEGIC PLANNING PROCESS AND TIMELINE

The University Librarian's Cabinet will oversee development of the Libraries strategic plan for the next three years. While the new strategic plan will have an external focus on our users, Cabinet has articulated a requirement that the strategic planning process deeply engage library faculty and staff according to these criteria:

- Clearly communicate impact on process as result of participation
- Do not bite off more than we can chew
- Do not need to include everyone in all aspects of the process
- Build on successes
- Be considerate of limited time
- Build in an ability to communicate and engage everyone at local levels
- Avoid duplicative processes
- Define the kind of communication we want and the best processes for accomplishment
- Acquire library faculty and staff ownership and commitment

PHASE I: VISION

We will anchor our plan to the university vision and/or guiding principles as expressed in its mission statement, strategic goals, and accreditation or other planning documents. We will derive from these sources the overarching impetus for our strategic plan and use them to inform our work for the next three years.

We will engage library faculty and staff in the process of visioning by using focus groups that explore scenarios describing various futures. The focus groups will not encourage participants to select "a" future, but will instead allow everyone to explore the benefits and challenges, likelihood and desirability of various characteristics that may shape our future.

OUTCOMES:

- Clearly articulated vision and/or guiding principles, derived from university sources, to drive our strategic planning process
- Wide participation of library faculty and staff through focus groups
- Cabinet has increased knowledge about library faculty and staff opinions, including differences as well as common ground

ACTIVITIES:

- Research university sources for vision and guiding principles
- Conduct internal focus groups using scenarios on all campuses

Estimated Timeframe: January 1-March 1

PHASE II: IDENTIFY GOALS AND PRIORITIES

We will organize input from the focus groups into broad themes. Cabinet will build on the themes and input to-draft high-level goals and priorities. Draft goals and priorities will be shared with library faculty and staff, including such leadership groups as the Planning and Coordinating Committee, Committee on Scholarly Communication, User Services Council, and Library Resources Council, to solicit their input. This part of the process allows for valuable input, by key stakeholders, early in the process. Goals and priorities will also be validated with existing assessment data.

OUTCOME:

- Agreed upon high-level goals and priorities

ACTIVITIES:

- Analyze focus group contributions and develop broad themes
- Cabinet members receive information and develop goals and priorities, begin to consider implications
- Share focus group results and goals and priorities with library faculty and staff and request input
- State of the Libraries update and discussion
- Existing committees respond to overall and relevant goals and priorities in relation to their activities and potential contributions

Estimated Timeframe: March 1-April 15

PHASE III: DEVELOP AND DISSEMINATE PLAN

We will develop a draft plan building on all of the contributions from library faculty and staff and including lead initiatives culled from the activities and potential contributions contributed by existing committees. The draft plan will be shared with everyone within the Libraries and the university community and finalized after considering comments received. A small drafting committee will be needed.

OUTCOME:

- A strategic plan to guide the work of the Library for the next three years is adopted and made widely available

ACTIVITIES:

- Draft plan
- Share widely and solicit input internally from the Planning and Coordinating Committee, committee on Scholarly Communication, User Services Council, Library Resources Council,

- and other groups and from the Libraries Advisory Group and student leaders
- Analyze input and edit draft plan
- Finalize and disseminate plan

Estimated Timeframe: April 15-May 30

PHASE IV: PROCESS ALIGNMENT AND PILOT CHANGE EXPERIENCES

This work involves feasibility testing of priority strategic activities selected as critical for accomplishing the goals of the new strategic plan. Library faculty and staff who have expertise related to critical activities will be invited to conduct situation assessments that examine current processes and opportunities for building in efficiencies and that identify any new processes and resources that will be required. A situation assessment involves piloting changes and organizing data about the pilot experience around the framework of goals and priorities, finances, administrative capacity, and staff. The focus of this phase will be on the areas of change that will yield the highest return on investment. Cabinet will select the areas based on input received from existing committees during Phase II and the plan developed during Phase III.

Scenarios may be useful in this phase of the process but would be used in a more focused manner. Scenarios would be created to focus on a specific unit or problem to be solved. Library faculty and/or staff would be selected to “solve a problem” presented in a scenario, allowing 1) creative ideas to surface, 2) focused and productive library faculty and staff involvement in the process, and 3) increased potential for ownership of the final decision about any required changes.

OUTCOMES:

- Multiple localized, pilot change experiences that are structured to increase learning and understanding and that lead to a reasoned allocation of critical resources
- Focused and productive library faculty and staff involvement in the planning process, especially by councils and other existing groups
- A comprehensive understanding of what is changing at RUL, in what order, and with what expected impact
- Strategic goals are linked to priority activities

ACTIVITIES:

- Experimentation, field research, etc.
- Analyze priority strategic activities relevant to current processes, opportunities, and requirements for plan success
- Create recommendations and a schedule of when processes will be changed and/or new processes introduced

Estimated Timeframe: May 30-September 1

PHASE V: IMPLEMENTATION

Implementation is the time to move forward with commitment and vigor. We will articulate our initial annual goals and confirm and make permanent any changes that were recommended during the pilots. Piloting, and the accompanying assessment, will also provide information about how certain changes might be scaled up to have broad impact and build in efficiencies in the early months of the new plan. Any required reorganizations, reallocation of resources, training and development will happen as necessary continuously over the three years of the plan. All activities will be keyed to annual goal setting and outcomes reporting.

OUTCOME:

- A revised strategic plan is adopted and made widely available

Estimated Timeframe: September 1-

PHASE VI: ONGOING EVALUATION

Ongoing assessment is already part of the RUL organizational culture. To reinforce this value, it will be explicitly woven into the communication about the planning process.

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