What is Helpful (and Not) in the Strategic Planning Process? An Exploratory Survey and Literature Review

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Abstract

Strategic planning is a necessary undertaking for many university libraries. Through a literature review and an open-ended, exploratory survey to university libraries in Australia, Canada, New Zealand, and United Kingdom, the researcher was able to get a sense of nuance and importance of some of the parts of the process. Themes include working on the process, library staff engagement, the timeframe of the plan and process, prioritization and focus, environmental scanning, and university plan alignment. This article contains practical, applicable information about the planning process. Understanding what worked (and what did not) can help others who are tasked with taking on lead roles in the strategic planning process, and can enable libraries to create a strategic plan that works best for their staff, users, and institution.

Introduction

"There is no single right way to undertake strategic planning: what matters is what works for the institutions, taking account of its culture, needs, and organization."[1] Although some ponder whether they would rather engage in strategic planning or go to a dentist appointment, strategic planning is a necessary endeavour in university research libraries.[2] How are we doing it? In casual conversations with some who deal with strategic planning, it became clear that academic libraries sometimes do things quite differently. Getting a sense of processes used

when planning strategically – what worked, and what did not – can help others who are tasked with taking on lead roles in strategic planning in the university library. Through a literature review and an exploratory, open ended survey, this article contains practical, applicable information about the planning process. The focus of this paper is to discover major themes that most university research libraries consider when working through the strategic planning process.

Background

Definitions abound in the literature on strategic planning. With its roots in the military, strategic planning became a focus for business organizations (and academic libraries) in the mid-1960s to mid-1970s.[3] In the 1990s, it was seen by some academic library circles as somewhat out of date, while in others it was "alive and well."[4] "Strategic planning is a formal process through which an organization envisions the future and develops the procedures and operations necessary to achieve it."[5] "Essentially, strategic plans act as a map or blueprint for the organization for the near term. These plans identify the current focus of the institution, determine future direction, and establish strategies for achieving goals."[6]

There are broader discussions in the literature on the positive and negative aspects of strategic planning.[7] Some of the literature looks at the plans themselves but not necessarily the process to get to those plans. Bielavitz conducted a content analysis of strategic plans of urban serving academic libraries to explore community engagement initiatives.[8] Another content analysis of library strategic plans discovered how libraries were responding to emerging trends and alignment with plans to the parent institution.[9]

Some papers look at specific aspects of the process, which include marketing's role in strategic planning, environmental scanning trends, using academic library data to help inform planning, linking strategic planning and assessment activities, using agile methods (adapted

from software development principles) in the strategic planning process, setting strategic priorities during periods of dramatic change, examining the role of human resource development within the planning process, and aligning the library's plan with the university.[10]

There are some individual case studies, including using a working group, Future Search Conference, futures thinking (scenarios), external facilitators, an altered version of a classic planning model, and appreciative inquiry to inform the strategic planning process.[11]. However, the literature is somewhat limited in library strategic planning processes on a broader level. McNicol investigated strategic planning in UK university libraries which involved a literature review, interviews, and survey with several UK library directors and senior university administrators. The key issues included library staff engagement, external communication of the library plans, level of active involvement in institutional planning, and difficulty in aligning with some aspects of university plans. There was also a concern for the lack of interest in outcomes assessment in the library sector when this was clearly of importance to the parent institutions.[12]

The Association of Research Libraries (ARL) worked on a Strategic Thinking and Design process "that began by framing the larger question of the future of the research library in terms of its role in the future of higher education, and then focused on ARL's critical role and work in that future."[13] The association actively avoided the word "plan" when working with ARL libraries because of the sense that it was a formulaic, top-down approach with fixed goals within a fixed time. The process consisted of a content analysis of library and institutional strategic plans, 10 Regional Design Workshops with over 360 participants, and five Design Studios that ultimately shaped the vision and framework of the organization.[14]

Method

In the Fall of 2016, university librarians from across CARL (Canadian Association of Research Libraries), RLUK (Research Libraries UK), CAUL (Council of Australian University

Librarians), and CONZUL (Council of New Zealand University Librarians) were sent a link to an online, open-ended, exploratory survey via an email from the researcher to the Executive Director of each association. The Association of Research Libraries (ARL) was not included because of their very recent project on strategic thinking and design process (noted above). The email asked the person most directly involved in the strategic planning process and staff engagement to answer the survey (for example, the university librarian, an associate university librarian, an assessment librarian, or other person charged with direct engagement with strategic planning). Respondents were asked to explain the process used for creating their strategic plan, what was helpful (and not) with that process, what they would do differently, what kinds of questions were asked of library staff and users, and any words of advice for those starting the strategic planning process. The researcher used NVIVO 11 to sort answers into themes. Some comments appear in more than one theme.

Limitations

Because of the exploratory nature of this research, open-ended questions were purposely used to engage with respondents. The following themes are based on respondents' personal reflections of strategic planning. It is not certain when the strategic planning took place. Because of the open-ended survey format and the fact that it was based on memory, some of the reflections were more detailed than others.

Results

Out of a potential 113 participants, 31 people replied to the survey in total (27%). University locations are divided below, but themes for the rest of the study were collated as a whole because they appeared regardless of location.

Australia- 11 (out of 39) = 28%
Canada- 13 (out of 29) = 45%

New Zealand- 4 (out of 11) = 36%

United Kingdom- 3 (out of 34) = 9%

Library directors/university librarians made up the majority of those responding to the survey (n=23). Two associate/assistant library directors/university librarians, and one assessment librarian also responded. Finally, five marked themselves as "other," encompassing "strategic initiatives," "planning & quality," and "strategy and planning" in their job titles. Twenty-eight of the 31 respondents stated that their library had a strategic plan. Quotations throughout the paper are representative examples of responses.

Themes

The main themes that emerged included working on the process, library staff engagement, timeframe of plan and process, prioritization and focus, environmental scanning, and university plan alignment.

Working on the Process

"*I think it requires the buy in of the executive, good leadership, and a very, very organized and diplomatic person or team to execute.*" Strategic plans tend to be coordinated by a working group or committee. This could be by a committee of staff from all levels of the organization or from the university library management group. Williams, Nickelson and Schottlaender had a 22-member working group with representation from every library department and staff classification. The group was chaired by a "librarian who was neither a member of the Libraries Administration Team nor a Libraries department head."[15] In contrast, Brown and Blake Gonzalez called for using a small committee with limited input, primarily consisting of senior management.[16] Some of the 15 total comments from survey respondents included the following:

"It's good to have one person responsible for moving the process along. Otherwise, nothing ever happens"

"After the first set of consultations, the library leadership group worked on a set of themes, and these were refined into goals/objectives"

"…working group with reps from all staff classifications to help craft final document"

"Once scoped, the Senior Managers confirm the final list of initiatives"

"Strategic design process included constructing a steering committee, made up of representatives of all employee groups"

"Led by ad hoc committee of all types of library staff from across the system"

Nutefall reported about the role and benefits of an outside facilitator used for helping to create a strategic plan for Santa Clara University Library. Benefits noted by the strategic planning committee included keeping the committee focused, knowing planning resources, ensuring a communications plan, providing a non-library perspective, facilitating group activities, focusing clarification of goals, keeping to a timetable, helping staff understand operational versus strategic goals, and (in the instance of an external facilitator within the university system) providing institutional knowledge.[17] Nine comments from survey respondents show that the use of an external facilitator was helpful in the planning process:

"…the external facilitator (plus a colleague from another university) challenged us to think out of the box and to prioritise"

"[The] initial facilitated workshop got us 80% of the way there"

"Employing a facilitator in the process was worth the cost because it provided some separation of process and content and outcomes"

Cervone cautions of excessive structure in planning, advising those working on strategic plans to be flexible. If the structure becomes overly formalized, the process can become too complicated and "a restraining factor in participants' creativity."[18] Comments from respondents mostly reflected this advice:

"Start early and have a structured approach"

"Just be prepared, and find a process that is suitable for the organization"

"Strategic plans need to be short, easy to understand and not run by management. They must be agile and real. A well-formed plan will really assist a library to develop its direction and work. People then start talking the same lingo- using the same words and know what questions to ask themselves when thinking about their work, for example, "is what I'm planning to do sustainable and scalable"

"Has to work all the way down the line, i.e., a library plan feeds to a directorate plan feeds to a team plan and so on- and all the way back up again. MUST include dependencies to stop silos from forming"

"Give up on perfection. A reasonably good plan today is better than a pristine plan five years from now. Don't get caught up in the words until the very end. Words matter, but get in the way of ideas too early in the game".

"Keep working out what's best for your Library"

Library Staff Engagement

Employee engagement typically means staff enthusiasm for an organization that makes one go beyond what might normally be expected on the job.[19] In the context of strategic planning, employee engagement is more along the lines of staff involvement or participation in the process. Throughout the years, strategic planning texts have often referred to the importance of involving staff.[20] The implementation of strategic plan goals ultimately rests on the staff who work the day-to-day operation of the library. It can provide buy-in from staff and enable them to work *with* the leadership. In some circumstances, it can help staff to gain a broader perspective than what they normally deal with operationally.[21]

One of the reasons strategic plans fail is because of a lack of staff engagement in the process. Mintzberg stated that strategic planning failure can occur because of the detachment or disconnectedness of strategy from operations.[22] For example, "accepting that public services library employees are directly in touch with the customer and in the best position to ascertain wants and needs is a critical first step to embracing strategic…planning."[23] A major dynamic of organizational cynicism and distrust can occur if an organization doesn't include all levels of

staff in the planning process.[24] "Successful execution [of a strategic plan] depends upon open communication and continuous shared purpose and buy-in that is rarely top-down or directive."[25] Nevertheless, collaborating and consensus-building can be time consuming, and can cause frustration with the overall process.[26]

In an interview with university librarians and deans whose institutions belonged to the Association of American Universities, Meier found that the level of participation in day-to-day decisions seemed to be "consultative," striking a balance between autocratic and consensus decision-making. However, when it came to strategic planning processes, directors use a more participatory model.[27] Casey described how the Hunt Library at Embry-Riddle Aeronautical University actively sought input from staff at varying levels of the library. The author described the benefits and challenges of different approaches used throughout the years with different plans. Methods included retreats, the SOAR approach (using appreciative inquiry to determine strengths, opportunities, aspirations, and results), and scenario planning.[28]

In interviews with library directors and senior university administrators in the United Kingdom, McNicol found variations on how library management approached engaging staff in the strategic planning process. In some cases, the plan was drafted by senior management and then circulated to staff for comments. In other instances, there was some initial consultation with staff, and then management devised the plan. Finally, other libraries used task groups to work on the plan, engaging with staff from various parts of the library who were interested in working in that area.[29]

Comments from the survey overwhelmingly showed the importance of including staff in the strategic planning process (n=40).

"All staff need to see how their work contributes to the big picture"

"Really worth doing, and spending some time involving staff and making everyone aware of the importance of the exercise and the final document"

"You can use the strategic planning process to bring in those who have felt isolated and passed over in the past by positively engaging them and giving them some ownership in the process now"

"Engage all staff and make it meaningful"

"There will always be some people who don't care and don't engage; don't worry about them; after doing what you can, just move on with those who want to be part of the process"

"This will likely be an initiative that is very important to senior administration, but senior admin needs to engage the departments and the staff in the process somehow as well- if not, then the whole exercise will seem like, well, just an exercise, and not be something relevant to their work"

Staff engagement can be divided broadly as active or passive participation. Active participation includes committee involvement, workshops and meetings, interviews, focus groups, environmental scans, and "other" activities. Although most respondents' comments involved active contributions, there were a small number of comments that suggested only passive engagement of staff in the actual process (for example, responding to a draft plan). One respondent commented how it might be done differently next time around:

"As lower level staff were not directly contributing to the process, except via their manager, we did not have direct input from team members. I would consider inviting representatives from all levels in future"

Library staff who were engaged only after a draft of the plan was in place had a chance to discuss the "operationalization" of the plan itself. When responding to what kinds of questions they asked of staff, some gave the following answers:

"Mostly whether they broadly agree that the plan captures the priorities, that the context is stated accurately and whether anything is missing"

"How do they see the library strategic plan relating to their day to day activities and tasks. Following on from what the plan articulates - what do they consider 'success' looks like"

"Having presented draft key strategies, staff were asked to identify actions which would support the achievement of these initiatives, who would be accountable, who should we collaborate with (to remove a silo approach) [and if there was] anything missing"

Many engage with library staff using workshops that tend to be near the beginning of the process (n=16). McNicol found examples in the United Kingdom of "awaydays," workshops, internal conferences, and lunchtime sessions for staff to hear presentations on strategy and to encourage discussion.[30] The UC San Diego libraries used departmental and committee meetings and open-invitation "town hall" meetings to promote dialogue among staff. [31] Interviews and focus groups with staff were mentioned as tools for staff engagement, although it is not necessarily clear if the terms "meetings" and "focus groups" were used interchangeably among respondents. In other words, as an open-ended survey, respondents used terms that were meaningful to them, but might mean different things to different people, meaning there were no clear definitions of terms such as workshops, meetings, interviews, or focus groups. For the purposes of this research, all generally are defined as "open dialogue with staff." As Kaplan and Beinhocker put it: "We found that the key to transforming these…meetings from dog and pony shows into effective vehicles for learning was to view them not as 'reviews by the CEO' but as conversations. The difference is that a conversation is a two-way street in which participants learn from and challenge one another – the goal is for everyone to leave the room much better informed than when they went in."[32]

"This was a highly consultative process that involved all staff meetings, special forums, etc."
"Used workshops and meetings with staff"
"Meetings were convened with library staff in order to gather their input"
"all-staff workshops in Library"

One library holds an Innovation Initiative competition with their library staff, inviting all to come up with an idea for a particularly innovative service or product.

"The written submissions are shortlisted by Library Management. The shortlisted entrants present their idea to library staff, who vote on the winner. The winner receives a prize (about $500 in a voucher) and their idea goes forward as a strategic initiative. Each plan must include an initiative that includes benchmarking a particular service or team as per our benchmarking

framework. The Library Leadership Team…meet in the third quarter of the planning cycle to shortlist the planning ideas submitted by Library staff, and come up with any ideas that fill gaps between what is on our shortlist and what needs to be covered based on the University's strategic plan. Based on this shortlist, staff are invited to express to scope and lead the potential initiative."

Questions asked of staff can be divided into big picture/trends and existing services. Staff were asked about the mission, vision, and goals of the library. Discussions about trends led to discussion about vision. Some were asked to "blue sky," brainstorm, and identify "where we want to play." Below are examples of "big picture" questions asked of staff (n=16):

"Reviewed the mission, vision and strategic directions carefully. What is missing? What feels old and tired? What no longer feels strategic?"

"What three priorities would you advise the Libraries to invest resources in over the next five years?"

"What are the key things we need to do to ensure that the library remains relevant to the university?"

"We had a successful experience doing 'scenario planning' where staff were invited to work in groups and present to the library staff on what they think the future looks like in 20 years' time (to inform the multi-year strategic plan)"

"What is the work of the future, and what is the culture of the future?"

"What's our business, now and in the foreseeable future?"

"What are the drivers for change? What are the key global, national or local trends which will impact library services over the next 5 years?"

Some engagement with staff was more operational in nature and examined existing services (n=8), including the following:

"[Questions included] what projects are you and your unit working on that you feel are strategic at the enterprise level?"

"We started with the University's strategic plan and asked how the various initiatives and functional units mapped to that, or what we could do to help the University achieve its goals"

"We ran an earlier library-wide discussion on "The Library in Transition" which fed into the planning process. The questions were about barriers to success, service gaps, and service improvements."

Timeframe of Plan

"Rapidly changing environments render plans out-of-date almost before they come out of the printer."[33] Respondents' timelines of specific plans are unclear from this survey. The literature is also unclear on the length of time strategic plans should optimally cover.[34] In the 1990s, the Association of Research Libraries SPEC Kit highlighted plans of ten different libraries with timelines ranging from five to ten years.[35] Years later, Fuente-Sabate, et al. examined strategic plans in business and found a time period range between one to three years, but Stephan stated that the current trend for library strategic plans leaned more towards five years.[36] Ball, Hayden, and Kloda also confirmed this finding. In an examination of strategic plans of Canadian Association of Research Libraries (CARL), they discovered a wide range in the duration of plans, with the most common being five years (11 out of 24 plans).[37] Cervone discussed more agile methods that can overcome issues related to the amount of organizational time and resources used towards strategic planning, otherwise "creating the plan is often so labor intensive and protracted that the plan is already out of date before most of the initiatives have even started."[38] Libraries "seldom look forward beyond five years with any reasonable prospect of success in their planning." [39] "Five years out is unknowable and, in an era of disequilibrium, unforeseeable."[40]

Four respondent comments related to the time range of the strategic plan itself:

"A three year plan gives staff confidence that [they] can achieve the objectives because the more complex objectives will require more than one year to achieve"

"We will plan for a three year planning timeframe for our next strategic plan"

"It takes a long time to complete, so we only update ours in line with the University strategy- every 5 years"

"Five years is a long time to have a strategic plan be relevant. Things change so quickly these days, and institutional mandates and other unplanned priorities can easily throw off strategic priorities that far out"

Timeframe of Process

"A prudent manager finds the proper balance between the twin evils of having no strategy because no time was spent on creating one and wasting too many hours of too many people creating a strategic plan."[41] This is a definite theme throughout the respondents' comments. Although only one respondent explicitly stated how long the process took to complete ("*It was a six-month process more or less"),* there were several comments focused on the timing of the process (n=26). Because many timelines were dictated by the university, many comments focused on the timing of the process being quite restrictive and how this affected engagement with students and library staff.

"Our timelines were dictated by the university, [we] would have liked to have had more time (or a different time of year) to better engage with students and faculty"

"Timelines can sometimes restrict our ability to go out for wider consultation. The process is reliant on the following to be developed (in order): University Strategic Plan, Library Strategic Plan, Library Team Operational Plan, Individual staff work plan. We are required to sign off on the work plan at a set time of year, which makes the timelines quite tight in a busy time of year (the planning cycle runs Jan-Dec, with the bulk of the planning work in Sept-Dec)"

Asked what was helpful in the process:

"Holding [manager workshops] the two days, a few weeks apart, gave participants the time to consult their teams and formulate contributions for the second day"

"Not rushing the process. Allowing time for feedback"

And what they would do differently:

"Schedule customer focus groups at the start of the planning process"

"…allow more time for ideas generation and discussion before focusing in on developing the plan"

"*The most important part of the process that we try to change each year is giving more time for staff to reflect on the previous year and the forthcoming year, and not rush the process"*

"The planning exercise — the research that went into the plan – has proven to be of more value than the plan itself."[42] Research shows value in the process itself, even if the plan

may go out of date. Stephan found that "it does take a lot of time and devotion to complete a formal planning process, and an organization must find a balance between being timely and creating a strategy to help a library reach short- and long-term goals; however, there is something to be said in favor of the formal process."[43] Respondents certainly had words of advice related to timing of the process, including the following comments:

"Do NOT belabor the process. Painfully long processes (extending out more than a year) are not helpful to the organization. People lose the thread of the conversation because too much time passes between events"

"I have begun to seriously question the time and effort that annually goes into a traditional strategic planning process"

"Allow it to take time- probably at least 6 months"

Prioritization and Focus

"Establishing priorities as a part of strategic planning states publicly what the core functions or services of an organization are. By committing to specific priorities, an academic library can allocate resources to the areas of greatest importance and set goals that advance that organization in the direction of meeting the highest priorities."[44] Setting priorities and maintaining focus are challenging but important parts of strategic planning. In an interview with UK library directors, one director described a very clear process for determining library objectives. "Firstly, they must relate to institutional objectives. Secondly, they must develop an area in which the library has expertise and finally, they should relate to feedback from users."[45] Cervone states that one must guard against becoming too focused on current issues to the detriment of longer range planning – that it is easy to get caught up in immediate concerns.[46] Curzon warns of the risks of external crises forcing a library to identify priorities under stress and to instead focus on continuous planning.[47]

Saunders' content analysis of strategic plans showed a major emphasis on collections, facilities (space), collaboration, and instruction, with secondary priorities in assessment and evaluation, staff, outreach and marketing, and virtual space or technology.[48] Through text-mining of strategic plans, the Association of Research Libraries found priorities in digital initiatives, staff development/organizational culture, outreach/engagement, supporting scholarship/open access/publishing, technological infrastructure, physical space, assessment, instruction, collections, students, services, diversity, collaboration, preservation, sustainability, emerging challenges, access/discovery, global reach, and interdisciplinarity.[49]

The importance of prioritization and focus emerged within the respondents' answers to the exploratory survey, with 29 comments relating to this theme.

"Prioritising is super important. The Plan should not list everything you do. It should list the major changes, [and] developments you want to achieve in a limited time"

"Plans will not invest equal amount of resources in all areas of the organization. Priorities will shift over time. Contain yourself. It's easy to write a 30-page document that one reads and has something for virtually everyone. It's considerably harder to craft a tight, short (2-page) plan that boils down your objectives to a small number of ideas"

"We do lots of work in libraries that is very, very important- but isn't strategic. That doesn't mean that we shouldn't do it. It just means that it isn't necessary for the senior leadership team to be talking about this activity on a regular basis. For example, the person who keeps the nuclear reactor operating is doing very important work. But keeping the reactor going is an operational activity that doesn't require mention in the Plan"

"It is …helpful to detach the operational/projects list from the strategic plan, so that it can continue to be a living, flexible document that can be regularly updated without having to change the formal strategic plan"

Some respondents remarked on the importance of library staff understanding the need to prioritize and stay strategic (as opposed to getting into the operational details). "Often it is just as important to state what will stop in favour of what will proceed. Staff needs to know what aspects of library service delivery take priority over others, and community members need to know what they can reasonably expect or anticipate."[50]

"A strategic plan is supposed to be strategic. It is not a task list of things you should have done, or a long list of everything that you could do. I suggest educating staff as to what the purpose of the consultation is, and what a strategic plan is for so that they will not be disappointed in the result"

"Sometimes users or staff provided very specific feedback which would get into operational details and lead the conversations on a tangent. If the facilitators were not skilled at keeping participants on track, time would be wasted"

"Often hard to translate thoughts from staff into strategy. Took leadership from me as [university librarian] to do this. In other words, in both cases I wrote the second draft using language that I thought captured these ideas and developing the Why or purpose that drives the strategy"

"Provide more guidance to Library staff to ensure the thinking was at a big picture level and not in the details for the initial stages"

Finally, comments related to the fact that they still have issues with focus:

"[We were] less successful at identifying activities to reduce or drop"

"*It is so easy for scope creep to enter into this process. We need to get better at not taking on too much. While collaborations are essential to major strategic initiatives, it does impact on expediency and commitment due to competing demands across units and faculties (schools)"*

"We have probably documented more developmental opportunities than we can achieve"

Environmental Scanning

"Without a shared-awareness of larger external trends, the strategic planning results will tend to focus inwardly – redefining internal library processes – rather than outwardly – strategically changing services for the future."[51] Germano and Stretch-Stephenson state that "the data collected by environmental scanning provides the foundation for any value-driven strategic plan. In sum, this information provides evidentiary support for the vision, mission, goals and tactics. Without rigorous data gathering and analysis, strategic planning has no focus or cohesion and is unlikely to produce meaningful benefits."[52]

Saunders examined the extent to which library strategic plans were responding to emerging trends and found that there was little mention of them in the actual plans.[53] This does not mean that libraries are not referring to them when planning. "Although the future is always an

object of speculation, knowledge of future possibilities is essential."[54] One does not need to necessarily conduct deep literature reviews to find useful resources. The Association of College and Research Libraries biennially releases a "Top Trends in Academic Libraries."[55] The Horizon Reports on Higher Education (both Library and Higher Education editions), IFLA trend report, and Ithaka S&R are also just some of the resources that can assist libraries in understanding external trends.[56]

Eight respondents specifically mentioned the term "environmental scan" as part of their strategic planning process, although there were also six comments referring to looking external to the library to examine trends. These included some of the following:

"Environmental review using 10 topics identified in the ARL top trends (73 staff participated); Speaker Series with 4 speakers external to the Libraries"

"10 interviews with leaders from the library and archives community"

"…presentation by external librarian to all staff and university community members were invited"

"…trends identified from visits at other libraries, attendance at professional development events like conferences and workshops, etc."

Environmental scanning was helpful to most respondents. A couple respondents specifically mentioned the benefits of including library staff in this process:

"Thematic reviews or deep dives into issues, challenges and trends has proven to be successful in building perspective and to challenge biases".

"The environmental scan process by involving a quarter of all staff gives buy in from them [what was helpful in process]"

One respondent found environmental scans *not* helpful, stating one *"needs to really focus to separate the wood from the trees,"* and therefore would do less environmental scanning if they could do things differently next time around.

Although environmental scanning is seen to be mostly of great importance to survey respondents, one respondent stated that "*university libraries are better off taking their cues from the internal university context if there is one.*" This leads nicely into another major theme from the exploratory survey – alignment with the university plan. "Libraries cannot thrive without aligning their workings directly to the core mission of their host institutions."[57] In order to prioritize trends that are found in the environmental scan process, libraries can focus on aligning activities with their university. "By couching their goals within the priorities of the larger institutions, and then assessing progress toward those goals, libraries can offer evidence of their contributions to the campus community."[58] Franklin found discrepancies in the goals of libraries versus those of their university, with many libraries organizing their strategic plans around traditional services such as collections, reference and instruction, and access services, while the university missions centered on teaching and learning, research, and education for employment. He described how the University of Connecticut used the pillars from the university plan as the framework for their library plan.[59] A few years later in a content analysis of university library strategic plans, Saunders found that 63.5% alluded somehow to the parent institutions' goals (via the plan itself, its goals, and/or mission and values). Sometimes this was a single reference, and sometimes each library goal was mapped to the university plan.[60]

Results from the exploratory survey revealed 24 comments related to university plan alignment. Sometimes, libraries do not have a separate library document but contribute to the university's bigger plan.

"The University approaches this quite differently from plan to plan- sometimes we are not permitted to have our own Plan at Library level, other times we are allowed to be quite flexible in developing our own Plan"

"We don't have a separate library strategic plan document. Our goals are included in our Division's triennial plan as per the University's directive. It is interesting that at our university we are not encouraged to have stand alone plans as the University Strategic Intent and the University

Plan sets the overall direction and strategy for Divisional plans that set the direction for operational plans from colleges and directorates"

Most libraries surveyed did have their own plan that aligned with the university, and found that doing so gave them the opportunities to prioritize and remain relevant with the university's goals.

"We did make the library's strategic plan mirror that of the university in form and language"

"We developed our own processes which were meaningful for our own staff whilst still linking in with the University's strategy"

"Vital to align with the university's plan in structure and language. That forces you to be considering whether you are in fact contributing to what the university considers important. It also gives you a common language to use when the library's strategic plan is being discussed or touted outside of the library itself"

"Be very clear about your University's strategic goals, processes and timelines or you may waste time on internal processes that aren't aligned to the University"

Conclusion

The combination of a literature review and survey can help an individual or team tasked with strategic planning to understand the nuance and importance of some of the different pieces to that process. University libraries need to decide if they will hire an external facilitator to help a strategic planning team along, and whether or not that team will be just management or a representation of all library staff divisions. Some libraries may not have a choice of what the timeline of the plan will be because of the necessity to align with whatever timeframe the university uses, but it is valuable to acknowledge that there can be issues with plans with timeframes of five or more years. The process timeframe may also be restricted to whatever the university dictates, but knowing what others do can help libraries prioritize what they need to focus on in the process and in the plan. Examining environmental trends helps the library move away from focusing inwardly on internal library processes and gives the library an outward perspective. Understanding external trends enables the library to be better prepared for the challenges ahead.

Universities as a whole are facing these challenges, and so it is of utmost importance that libraries align with the plans and focus of their parent institution.

Library staff engagement is an important piece of the strategic planning puzzle. Having staff engaged in the process enables them to have more ownership in the plan itself and helps the disenfranchised of the organization have their voices heard. As with any user engagement, expectations need to be mitigated and priorities set. There is a delicate balance of knowing you've been heard but understanding that not everything can get into the plan. Management transparency and communication is key to setting that balance.

Although there seems to be a lot of active participation and open dialogue with staff in the form of meetings, workshops, and forums, further research is needed to delve deeper into the intricacies of these activities. The open-ended survey was very helpful in initially exploring the process, but more research using stated definitions would help with clarification. Just how much open dialogue is occurring is unclear in some cases. It is undeniable, however, that staff engagement is vital to the process.

How the strategic plan can be operationalized to daily work is critical for keeping the plan alive (and not gathering dust on the shelf). But more work is needed to help guide staff to think "big picture" throughout the process. As management and staff at all levels get accustomed to being involved in the strategic planning process, so too will their level of contribution and way of thinking about strategy mature. Being prepared, staying focused, having a structured but flexible approach, and using a process that best suits individual organizations will enable libraries to create a strategic plan that works best for their staff, users, and institution.

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