Evaluating a Future Search Conference for an Academic Library's Strategic Planning

Danuta A. Nitecki, Jennifer Livingston, Gerry Gorelick and Suzanne G. Noll

Abstract

The Future Search conference, a well-documented planning tool, is widely used to engage a large number of stakeholders to create a shared vision and action plan for an organization, community, or other human system. An evaluation was conducted one year after an academic library implemented this approach to imagine its desired future and to articulate its strategic directions. Using both interview and survey methods, this case study offers insights about the extent to which the Future Search conference output was realized in an academic library setting, its impact on transforming the library, and its applicability for academic library planning.

Introduction

Leaders in higher education are increasingly challenged to redefine the academic library. Rising costs of education and the rapid transformations in pedagogy, learning behaviors, and reliance on technologies question the very purpose of the traditional library. No longer is providing access to published information the primary role of libraries.   Electronic resources and mobile devices reduce if not eliminate the need for people to go to a physical place to access publications. Study behaviors demand spaces for noisy group work as well as retreats for individual reading and silent reflection. Teaching is increasingly conducted remotely, and learning is recognized to occur beyond the campus classroom, including in libraries as well as residences, cafes, hallways, and cyberspace. The notion of the library as a gateway to collections and a quiet place to study is inadequate for today's university. Though some question the very need for a library, others think its strong iconic status for higher education would be difficult to change. Accountability for resource allocation and demands for limited academic real estate require librarians to transform the library and demonstrate its contribution to the work of the university. However, no single tool to plan and launch transformative changes in an academic library is commonly accepted as effective to help meet this expectation. An exploration of utilizing a Future Search planning conference, reported here, offers insights toward addressing this gap.

Against this backdrop and with a charge to draft a strategic five-year plan, the leadership of one academic library sought to create a powerful and shared vision of its future and its contribution to advancing its host institution. Faculty, students and administrators did not hold strong opinions about the library, let alone have a common vision of its role in the academic enterprise. Though the librarian's articulation of how libraries benefit the academic enterprise was respected, few had reason to embrace the library's role in strategic planning. Traditional strategic planning techniques, with linear paths toward identifying goals and overcoming barriers to achieve a vision seemed inappropriate to launch a transformative change. That approach assumes acceptance of a leader's vision and understanding of

conditions affecting its implementation. Alternatively, the Future Search protocol was selected and implemented to facilitate planning for, and perhaps newly imagining, the academic library.

This study explores the impact of the Future Search approach on transforming an academic library and does so from the perspective of its stakeholders. Characteristic of a case study, this examination offers a qualitative assessment of complex issues in their real-life context. The findings may not be generalized beyond the setting of the one academic library where the Future Search conference was conducted, but the authors' discussion of them will provide insights toward understanding this planning approach, its impact on managing transformative change and its applicability for academic library planning. The study's conclusions will be useful to library managers and university administrators who are considering ways to envision the future academic library, as well as to organization development practitioners seeking ways to engage groups in planning strategically.

Two questions guide this study:

> 1.   How are outcomes of a Future Search conference perceived to impact transformative change of an academic library?
>
> 2.   How applicable is the Future Search process for academic library planning?

Setting

A new university president began in 2011 to design an ambitious five-year strategic plan to transform Drexel University into a comprehensive research university distinguished by its experiential co-op education. This signature tradition of providing significant occupational work experience as part of the Drexel academic program prepares professionals in such fields as engineering, medicine, nursing, public health, business, law, information sciences, arts and media, as well as experts building on their majors in the humanities and sciences. The University strives for a global presence, for strong civic engagement, and for facilitating translational research to solve important social problems.

The Drexel Libraries was challenged to advance this newly articulated university mission when it was not clearly positioned as a significant attribute of the institution. The university's strategic plan prepared by the previous administration had no mention of the library. The Libraries is a medium-sized academic library, serving a population of approximately 23,000 students and 3,000 faculty. Its collections consist of roughly 650,000 volumes with 90% of its acquisitions budget used for several years to provide access to electronic information resources. Following numerous discussions and a formal space assessment during her first year, a new Dean of Libraries perceived a general lack of high awareness of the library, its many services and its potential as a major component of the University's strategy for innovation and ambitious development into a major academic enterprise. The Libraries is part of a comprehensive research university that is recognized as "up and coming" with a focus on expansion and building infrastructure for classrooms, labs and resident halls, located in a large urban setting where real estate and operating costs are high. The Libraries' facilities were undersized [by over 180,000 square feet]

when compared to any measures for library and study space supporting a comparable student population size.[1] Its size of collection, staff and budget did not meet the membership criteria of the Association of Research Libraries, whereas nearly all the libraries of universities on Drexel's list of comparable and aspirational peers are ARL members. The challenge Drexel faced was how to transform its library to meet the demands for the first part of the 21st century.

The library was not explicitly mentioned within the vision or directions for the university as work on a new campus five-year plan began. And yet some administrators, even without articulating what its future role might be, agreed that the library had unmet potential.   Its association with providing study space was addressed by a space assessment exercise in which the Libraries began to redefine itself as a learning enterprise.   This included an emphasis on partnering with others in advancing the university's mission and going beyond a library's expected supportive service role of maintaining study spaces and collections. Within the next year, the Dean of Libraries was encouraged to develop a plan to transform the library that could complement the university's new strategic plan for 2012-17.   The president sought a broadly inclusive planning process to address several articulated objectives to evolve Drexel. He did not have a preconceived idea of the library, suggesting that one should emerge from the planning process.

The Dean of Libraries began informal discussions as to how and where the Libraries might be included in the new planning effort. Although the Strategic Planning process led by the President and the Provost afforded the Libraries participation on a couple of the established Task Forces, all agreed that it did not provide a holistic consideration of the Libraries' future. The Dean of Libraries had already embarked on some initiatives in the direction of transforming the University's libraries into a true partner in learning, for students and faculty and was encouraged to undertake a more focused planning process for the Libraries as a supplement to the campus program.

In response, the Dean of Libraries sought a more engaging process with the Libraries' stakeholders that would energize and inform a vision and plan to transform the Libraries within the larger context of the University's strategic plan. Evolving a vision through engagement of multiple constituents rather than imposing one from the top was deemed an important characteristic for framing the library's planning effort. The Dean recognized that having a list of the "right ideas" would not suffice; a means was needed for establishing that such a list had validity across the range of stakeholder views. Further, identifying an interactive setting where energy for engaging with these ideas might be found was equally essential. In the end, she selected the Future Search method in order to engage a large group of stakeholders to both envision the Libraries' future and to begin to spark the organizational changes needed to bring about that future.

Literature Review

Descriptions of strategic planning in academic libraries share similar themes: the library is an organization continually faced with rapid change, leaders typically set a vision, and to varying degrees library staff engage in creation and implementation of strategies. As Joseph Matthews points out, "most

libraries moved from a focus on the growth of their collections to recognition that the most dominant force driving the library is change."[2] An observation made over three decades ago continues to apply today:

> The forces that have been transforming the library during the last decade are intensifying and accelerating. We will have to move quickly and decisively to take advantage of the opportunities such a climate of change offers. The library can either ride the wave of change or be overwhelmed by it.[3]

Through publications over numerous years beginning in the 1980s, Donald Riggs championed strategic planning for academic libraries as "a logical and effective method of intervention, defining an appropriate direction toward a future in which they will flourish."[4]

Although popular, strategic planning has not been a universally adopted protocol within academic libraries. In the 1990s, some considered it "out-of-date and passé" while others found it "alive and well in ARL libraries."[5] More recently, examinations of practice suggest that what is reported as strategic planning in many libraries is less strategic and more "a reactive form of long range resource allocation planning," that lacks leader-defined vision, does not apply competitive environmental analysis, and furthermore takes decades to undertake.[6] Like other non-profit organizations, libraries need strategies that are driven by what customers most value.[7] Strategic planning may gather opinions from customers, but the process as undertaken in academic libraries typically has not engaged stakeholders in setting vision, analyzing environmental factors, or planning strategies. The need to transform the Libraries demanded a method that is known to bring about transformative change, to create something new rather than a path to a predetermined destination.

The Future Search protocol emerged in 1982[8] as an effective process by which large groups of people who otherwise may not have worked together can effectively make and implement ambitious plans. Developed by Marvin Weisbord and Sandra Janoff, this cooperative planning approach offered an alternative to top-down visioning and autocratically led strategic planning efforts.   Weisbord and Janoff integrated several approaches designed over five decades before. Their work included principles from Wilford Bion and Eric Trist's post World War II "leaderless group" concept that evolved into self-managing teams, and their "Search Conference" model that emphasized looking at global issues prior to addressing local issues. In addition Weisbord was influenced by the work of Ronald Lippett and Eva Schindler-Rainman who used large-scale communities (the "whole system") for exploring the future. Weisbord named the resulting innovative combination of bringing these concepts into one room for a conference "Future Search."[9]   The primary goals of the intense exercise are to enable diverse stakeholders in the future of the identified issue of the conference, to benefit from systems thinking and to have a space to work together.[10]

A multi-day conference is the central activity of the Future Search protocol. It recommends bringing together representatives from each of generally eight key groups of people who collectively have formal authority, skills and knowledge of the identified topic, as well as being significantly affected by the

potential outcome. A typical Future Search conference involves 60-80 people with diverse perspectives in structured conversations over two and a half days. During the conference, participants:

- Make meaning of the relevant past and the present, including relevant current trends

- "Own up" to feelings about current activity

- Imagine the most desired future and carefully discover elements which are shared

- Create action plans based on this common ground and volunteer commitment to achieve them

Months of preparation by a smaller steering group representing each of the key stakeholder groups are needed for a successful conference. Future Search trained consultants are typically engaged to assess fit, work with the steering group to plan the event, and facilitate the conference itself.[11]

The creators of the Future Search protocol established a "set of mutually-reinforcing practices or conditions for success."[12] These include eight conditions, consisting of four core principles:

1. Whole system in the room: A broad cross-section of interdependent stakeholders in order to provide diverse perceptions to create a more complete picture and to enable the forming of new relationships as a foundation for action. People with authority to act, resources, expertise, information and/or who will be affected by the outcome are the right participants.

2. Global context for local action: Exploring the conference theme in reference to the world outside, exploring participants' views of global trends as a backdrop and creating a shared view of the whole before exploring any single part.

3. Focus on the future and common ground, not problems and conflicts: The conference aims to acknowledge differences but not to resolve them, focusing instead on discovering the future that everyone wants.

4. Self-management and responsibility for action: Everybody shares information, interprets it and decides on action steps, which reduces hierarchy, passivity, conflict and dependence on experts or facilitators.

These also include the following four "insurance policies" which contribute to a successful conference:

1. Healthy meeting conditions: Daylight, comfortable meeting space and good food to support optimum work.

2. Full attendance: All participants attend the entire meeting.

3. Three-days (sleep twice): To allow for reflective "soak time" between sessions.

4. Taking public responsibility for follow-up: Participants are asked to say publically what they will do next.

Although Future Search has been used in several thousands of settings and repeatedly characterized as successful,[13] there is only a small yet growing research literature on assessing the method. Polanyi concludes his review of the literature with the observation that "there have been few attempts to systematically and critically assess the claims made of Future Search."[14] He identifies four master or doctoral dissertations on Future Search,[15] but suggests that only two utilize formal research methods of analysis. Stewart conducted six in-depth interviews with participants to explore reactions to the social process of "finding common ground." Polanyi recognized Oels' research as most rigorous in comparing two conferences and participants' views on fairness and competence.[16] More recently, Olsen's study on the relationship of transformational leadership to successful Future Search conferences highlights the maturity of the protocol as an organizational approach for change and as a credible venue for research. She acknowledges that most assessments of the success of Future Search are case studies, relying on goal achievement.[17] She does the same, placing the Future Search concept in the context of other models of group participation including Search Conference, Real Time Strategic Change and ICA Strategic Planning Process, identified by Bunker and Alban.[18] In turn, Polanyi utilized qualitative methods to gain insights into the social interactions of a Future Search conference. He gathered data before, during and after the case study conference, interviewing the design team and conference participants with recorded in-person and telephone interviews. In addition, content analysis of documents added depth to his rigorous and robust study.

Libraries are seldom specifically identified in lists of the diverse settings where the Future Search has been used. However, libraries have in fact employed the method since at least the mid-1990s. Published accounts of library Future Search conferences identify stakeholders gathering to focus on the future of school libraries,[19] public library services and buildings,[20] state library plans[21] and academic libraries.[22] Several of these followed modified versions of the Future Search process. For example, in October 1994, fewer people and a shorter conference than the Future Search design recommends addressed how information systems in the state of Washington can enhance learning at the K-12 levels. The results of the conference included "a powerful reaffirmation of people's efforts . . . culminate to support a larger vision," "stimulated new ideas and action," "establishment of a network of 32 people…committed to being change agents" and "personal connections made…that are the inspiration for later events." The account also emphasized the need for a system to track progress and said that the conference "is a new way to learn; it is a quicker way to effect change. It is an effective strategic planning process that creates energy and works."[23] The 2007 conference at the North Carolina Durham County Library concluded with similar insights from participant comments including that it created enthusiasm, interest, and knowledge about the public library.[24]

A review of the literature and websites identified three academic libraries where Future Search has been used. A database maintained on the Future Search Network website accessible to members only lists one college library Future Search conference as of September 24, 2012, conducted in 1995 at Franklin College of Indiana, an institution for undergraduate study with 1000 students. The authors sent a query to the current library director about this early application of the Future Search in an academic library. Documents were discarded a decade after the conference but from a summary report and personal recollection of the organizer, the impact there was described as follows:

[The] visioning process was useful in helping the librarians with their planning and also in increasing other stakeholders' appreciation of the librarians and their work.[25]

I considered this project one of the highlights of my work in the library. Bringing together diverse groups, you will remember we even included the outside community with the head of the Franklin Public Library being a participant, was an eye opener for me in particular, and I would like to believe the rest of the staff as well.[26]

One published report of an academic library Future Search conference utilized a very modified version, adopting "speed" interviewing at the University of Pittsburgh in October 2011.[27] The earlier Drexel University conference held in July 2011 is the only known instance where the traditional Future Search conference was held to address a university library's future.[28] It is also the only identified setting among libraries of any type where a systematic evaluation was conducted after the conference to assess successful execution, impact, and applicability of this planning protocol.

Research Methodology and Design

The case study research design fits the challenge of learning about the complexity of planning for change as it is based on "an extensive description and analysis of [an] instance taken as a whole and in its context."[29] It "is an excellent way to increase familiarity with a problem and to gain a brief awareness of a setting or phenomenon."[30] This case study utilizes multiple qualitative methodologies to evaluate the execution, impact and applicability of the Future Search protocol in an academic library setting. Aiming to evaluate a single application rather than test a theory, this case study takes the form of an illustrative critical instance that provides deep insights from a unique perspective on a planning approach. A common social science research methodology, the single, retrospective case study systematically analyzes information about perceptions and events; it illuminates a set of interrelated factors that illustrates a process. Data gathering in case studies may involve a variety of approaches, including qualitative research using structured in-person interviews. The methodology limits generalizations of findings to other settings, but offers results that inform and generate understanding of the topics of inquiry.

As is often the case, the selection of the specific case setting for this study was opportunistic and based on a convenient situation to evaluate use of a planning method in an academic library. This setting shares characteristics with many other academic libraries uncertain about their future. It represents a mid-sized academic library, challenged by limited resources to support the full range of research, teaching, and service activities of an institution characterized under the Carnegie Classification criteria as a doctorate granting, private not-for-profit university. The authors have not identified any other similar settings that share full implementation of the planning approach and thus propose that this is the first known case of a systematic evaluation of the use of the Future Search protocol to planning in academic libraries. The research design for the evaluation, undertaken approximately a year after the conference, includes recognition of the characteristics of the setting, as well as data gathering and analysis from face-to-face interviews of the members of the conference planning team, and a survey emailed to all conference participants.

Case Setting: Drexel University Libraries

In Spring of 2011, the decision to select the Future Search planning protocol was tested with a group of nine faculty, administrators, and professional staff at Drexel University, and in spite of initial skepticism about enticing people to give nearly three days of their time to this activity, the overwhelming recommendation at the close of this first step was to go forward. A Steering Committee of nine key stakeholders, including faculty, administrators, professional staff and a student, was convened with the help of two facilitators experienced in the Future Search protocol.[31] Over the course of seven meetings spanning three months, the Steering Committee made numerous design and logistical decisions related to the conference and thought through questions of how to adapt it to the specific academic setting. The Committee collectively entitled the Drexel Conference as "The Future of Drexel Libraries: Advancing the University's Strategic Transformation" and identified multiple participants representing the following eight stakeholder groups to invite:

- Academic Support
- Academic Administration
- Non-Academic Administration
- External Friends of the Library
- Faculty
- Library Staff and Information Specialists
- Students
- Student Life Professionals

The conference was held over three days in Philadelphia in mid-July 2011. Fifty-six attended, representing all stakeholder groups, each with six to eight participants. The setting of the conference was a large room at the Queen Lane Drexel University College of Medicine campus where breakfast, lunch and refreshments were provided in a pleasant setting with natural lighting and relaxed ambiance during a period when school was not in session. The Drexel Conference agenda followed those of a traditionally scripted Future Search described above. Highly interactive activities were conducted through small group discussions, individual reflections, visualizations, and creative projections. Results emerged and were expressed in various ways like creating a timeline on a posted roll of paper stretching approximately a dozen feet, a 10 by 8 foot mapping of factors that resembled a huge spider web when completed and presentations of a series of skits, drawings and models made with pipe cleaners, colored markers, construction paper and newsprint. Participants worked at tables and walls, sitting, standing and walking, in small groups and with the whole assembly. Sound levels included times of quiet reflection, creative laughter, multiple and simultaneous discussions and single voice presentations listened by all participants. For the final exercise everyone sat in a circle and one by one expressed their take away ideas of the conference. The three days managed an intense energy level with very few "down times" and ended with high enthusiasm. Understanding the outcomes of the conference is one of the motivations to conduct its assessment, reported here.

Data gathering and analysis design

The data for this study were gathered through individual interviews with the Steering Committee members and an e-mail query of all conference participants including the Committee members. Data were gathered seven to thirteen months after the conference, thereby aiming to capture lasting impressions of the event and its impact. A trained facilitator conducted the interviews and analyzed results from both the interviews and the mailed survey. She was recognized as neutral to this project since she did not participate in the conference or its planning. Both approaches followed established protocol for interviews and qualitative analysis of findings.

Interviews of Steering Committee members addressed three areas: the extent to which they felt Future Search principles and conditions for success were met, their experience of the conference as a participant themselves and any impacts they experienced or observed after the conference (Appendix A). The interviews took place at a neutral location of the interviewee's choosing and lasted between 30 and 90 minutes each. Confidentiality of responses was maintained.

All conference participants were sent an email invitation from the Dean of Libraries to complete a short questionnaire (Appendix B) through the online survey management system Survey Monkey, which assured confidentiality of responses. Survey respondents were asked to rate the extent of agreement or disagreement with 10 statements on a five-point scale. The statements represented key conditions for success of a Future Search conference and potential areas of expected impact. Two open-ended questions asked respondents to identify any indirect, "ripple effects" they attributed to the conference and an opportunity to reflect on the conference experience. One demographic question asked respondents to identify association with the eight stakeholder groups. The questionnaire was open for one month, beginning July 31, 2012.

Findings about the Conference

Perspectives from each category of stakeholder were captured through the two data gathering methods used in the study. Interviews were conducted with each of the nine Steering Committee members. However, one of the Steering Committee members participated in the planning process, but not the actual conference, and consequently was not able to answer questions about the experience of the event itself. In addition, of the 56 conference participants, 21 [37.5%] responded to the survey. As Table 1 illustrates, the survey respondents represented all groups of stakeholders except for academic administrators, with the highest portion being faculty. However, four of the Steering Committee members who were interviewed are academic administrators.

Following the recommended research design conditions for a case study, validity was addressed through analysis of evidence gathered from multiple sources and open to audit by others to verify results. The results from both data gathering efforts validate that the focus of this case study, the Future Search conference, did meet the essential criteria of this planning method. Table 2 summarizes the extent to which responding participants agreed with statements that characteristic Future Search conference conditions were met.

Table 1: Distribution of assessment respondents by stakeholder group

Stakeholder group	# Conference participants	Survey		Interviews conducted
		# responses	Percent response	# Steering Committee members
Academic Administrators	5	0	0.0%	3
Academic Support Services	6	1	16.6%	1
Administrators Other Than Academic	5	2	40.0%	0
External Friends	8	4	50.0%	0
Faculty	8	5	62.5%	1
Library Staff & Information Specialists	8	3	37.5%	2
Student Life	8	3	37.5%	1
Students	8	2	25.0%	1
Unidentified		1		
Total	56	21	37.5%	9

Table 2: Perceived Future Search conditions among Steering Committee members and Participants

	Steering Committee members				Conference Participants			
Item rated	# of ratings…			Mean	# of ratings…			Mean
Conditions/Principles of a Future Search conference	All	High* (4, 5)	Low** (1, 2)		All	High* (4, 5)	Low** [1, 2]	
Whole system in the room	8	8	0	4.56	21	17	1	4.14
Global context for local action	8	3*	0	3.44	19	17	1	4.05
Focus on the future & common ground	8	8	0	4.44	21	19	1	4.29
Self-management & responsibility	8	7	0	4.25	n/a			
Healthy meeting conditions	8	7	0	4.63	21	20	0	4.52
Full attendance	8	6	1	4.00	n/a			
3 days (sleep twice)	8	8	0	4.69	n/a			
"2.5 days to meet was too long"	n/a				20	9	4**	3.40
Public responsibility for follow-up	8	2	3	3.06	17	6	3**	3.29
Outcomes								
Conference was valuable use of my time	n/a				21	14	1	3.95
Contacts made…were important to me	n/a				19	16	1	4.05

Conference helped develop a common vision…	n/a		21	18	2**	3.95
Conference helped position the Libraries to advance Drexel Univ's transformation	n/a		19	13	1	3.79

* For all but the one condition/principle indicated, the high score was '5'.
** For only the three conditions/principles indicated, was there (a solitary) low score of '1'.

[Note: Participant responses were aligned with scale where 1=very strongly disagree, 5= very strongly agree]

The collective perception of the Steering Committee members and a sample of conference participants was that this case study's conference was successful in achieving the eight conditions that characterize the Future Search protocol.   Three of the conditions that Norum identified as "minimum critical specifications," are "getting the whole system in the room, exploring the local context within the global and working in small self-managed groups."[32]   Interaction of these three conditions, according to designers of Future Search, increases the likelihood that the conference will go "beyond participation to the farther reaches of common ground, creativity and committed action."[33]

Perceptions of those involved in this assessment agree that the Drexel Libraries Future Search conference successfully met these three conditions, although the condition "exploring the local context within the global" was less strongly met. Steering Committee members recognized that the "whole system in the room," "full attendance" and "three days" conditions were well achieved with 56 people representing eight major stakeholders participating over the two and a half days of the scheduled conference. A comment from one of the survey respondents challenged the Future Search core values supporting the "whole system in the room" condition which Weisbord described as "the real world is knowable to ordinary people; their knowledge can be collectively and meaningfully organized…Everyone is an equal; planning should not be left to the elite of the organization…[and] the process should empower people to feel more knowledgeable and certain about the future."[34]   The respondent's comment also contrasts this Future Search value with the academic expectation for expert opinion to inform decisions:

I think the issue about the mix of participants is not just the mix but the fact that all of us were treated as equals in the process, whereas in fact, some were much more knowledgeable than others. For example, the head [sic] of Philadelphia Free Library was there and the former director of the Penn State Libraries, yet the process, with its reliance on real time speaking and listening, did not allow their voices to inform us any more than others. If the process had included some position papers on the context of libraries in today's world, and some key stakeholder views that we could have read before the conference, that would have been helpful.

(Note: References to literature about trends in academic libraries as well as descriptions of the Drexel University Libraries were sent to participants prior to the conference with optional suggestion to review these as helpful background.)

Although the conference duration continued to be questioned by several of the Steering Committee members, nearly all attendees did remain for its duration. Some characterized the duration as "overkill" and "ridiculous," while others commented that participants were "enervated" or "annoyed" by the time required of the conference. Survey participants held mixed opinions, with most leaning toward agreement that it was too long. And yet, in response to the separate statement "the conference was a valuable use of my time," participants agreed.

The achievement of the condition of "focus on the future and common ground" was perceived by most as successful. However, at least one participant questioned the premise that there were clear, shared and diverse experiences to build upon. One insight offered was that since stakeholders did not hold high expectations and did not represent collective agendas from which to negotiate partnerships, there was weak, if any, reason to reach common ground. This underlying assumption of the Future Search protocol may be critical to its success. As one participant put it, "you can't find common ground if you don't have diverse ground."

Research conducted in the United Kingdom identified post-conference follow up as a weakness of the Future Search approach. The Open Futures group, including representatives from profit and nonprofit organizations, utilizes research and experiences to improve collaborative working environments, particularly working with centers for K-12 students across Europe. The group framed three major weaknesses as cautions for participatory events:

1. Needs a lot of time and energy to organise
2. It can be hard to convey the energy and excitement of participants to non-participants
3. Needs careful follow-up to support action groups at a time when organisers are usually pretty exhausted[35]

The Drexel assessment suggests that participants perceived the anticipated "public responsibility for follow-up" to be only modestly achieved. Though enthusiasm and some partnerships were forged at this conference, the Future Search did not, in this case, build a coalition of commonly directed strength to resolve the conference theme. The conference did succeed in producing a common-ground vision for the Libraries' future.

Research Findings and Discussion

Data gathered through these two methodologies offer insights into the two questions posed for this study. However, any generalizations beyond the group of respondents should be made with caution since the response rate was modest and may not reflect fully the reactions and experiences of all conference participants. Furthermore, this case study by its nature is limited to one setting and one Future Search conference. Nonetheless several of the insights drawn reflect anecdotal observations found in the literature.

1. How are the outcomes of a Future Search conference perceived to impact transformative change of an academic library?

The data from Steering Committee members and other participants suggest that the conference succeeded in several critical areas, especially improved understanding of the Libraries' potential contribution to the university and its Strategic Plan and relationship building.

First it improved understanding of the potential of the Libraries in advancing the University's mission and some of the challenges it faces to maximize this role among a diverse group of University constituents including key administration decision-makers. Some expressed surprise that people still want new physical space and access to books. Others admitted they became aware of missed opportunities including tapping librarians more as teachers and considering the Libraries as a "meta college." There was recognition of the value to connect with other participants and to collectively advocate for the Libraries.

Another important perceived impact was a shift in the Libraries' part in the University's new five-year Strategic Plan, which was taking shape at the same time as the conference. Participants cited the presence of the Libraries in several of the University's strategic initiatives, including the planned development of Drexel University, as a nexus for innovation. This shift in the Libraries' potential contribution to the campus was illustrated by such comments as, "the Library will play a major role as a place for connectivity," "the inclusion of information literacy as one of the Student Learning Priorities" and "a great digital library will help us reach our goals."

Participants cited the formation of new relationships among people across disciplines and work roles as a key personal "payoff" for their investment in the conference. In a typical university environment, it can also build bridges across academic silos. Future Search's known ability to connect individuals around a common theme is not just about expanding personal networks. Those networks become key pathways for action that would not have existed otherwise. Some comments from participants:

> I have kept in contact with many of the people I met at the conference. Being able to come together in one place and express your own opinions in the midst of everyone else's really helped to develop a solid direction out of the participants.

> Yes, I met a librarian not assigned to my College, whom I would not have met as I go to the library online more than face to face, and we have developed continued dialogue and plans bouncing library ideas back and forth.

> I now have both broader and deeper connections with the university as a result of the opportunities to discuss issues (and socialize) at the conference.

> While I do not think that we united around one common vision for the library, I think we all came away with more appreciation for the potential of the library in today's university community and some of the issues it faces. Also, I am involved in collaboration with the library in a number of ventures that I probably would not have been otherwise since I got to meet [the dean] and other librarians and realize their expanded role in the library of the future.

It is also important to note that the approximately dozen themes identified by participants at the conference were directly used as input for the Libraries' own strategic plan.

Generally the conference was perceived as less successful in leveraging the enthusiasm of participants to engage in taking action beyond the conference. Some responses observed that events like this "work best when there's a real problem to solve; this was more pie in the sky." This confirms an intended effect of a Future Search, but not a shared experience that this conference achieved it. For example, when asked whether they had signed on to one of the action groups identified at the conference, nearly all gave some version of a disengaged response "Maybe I did, but I don't remember" and/or "I didn't do anything related to it afterwards." One Steering Committee member noted the feeling that the things that happened afterward would have happened anyway. There wasn't a sense of urgency, as one person noted the "process is strong when people have strong agendas and missions. We didn't really have that." The action group sign-up didn't represent real commitment.

The lack of follow-up or continuity on initiatives identified at the conference left uncertainty about the impact of this Future Search in some participants' minds.

> *I met a number of people at the conference, and that was useful. It seems as if some of the initiatives are going forward, but many of them remain in limbo. So it is hard to assess how impactful it was overall.*

Perhaps an overall perception was that "the fact that we did it was more important than the individual things that came out of it."

2. How applicable is the Future Search process for academic library planning?

When success of an organization, such as an academic library, is dependent on its placement within a host institution, and when there is no common understanding and commitment to the value the organization can contribute to the larger enterprise, then a Future Search is a well-tested approach and successful choice to reach common ground, creatively envision an ideal future, identify specific initiatives to pursue it and build coalitions for taking action.

A Future Search conference design offers a framework that balances the asset of diversely distributed expertise with potential benefits that can emerge from a whole-system, holistic approach to planning. Otherwise, many view contributions the library offers as tangential. Multiple and diverse groups on any campus whether students, faculty, administrators, alumni or staff, hold strong opinions on what the library should be. In some institutions, stakeholders hold additional opinions on how to run a library and achieve their vision of its role and what it should provide. Seldom is the library viewed as a powerful partner in achieving the university's mission, especially when faculty guard exclusive rights to teaching, students consider the library as a study hall monitored by librarians more concerned with maintaining quiet than advancing their learning, alumni remember nostalgic times of browsing books and escaping to hours of pleasurable reading in the library, and staff are not competitively rewarded for expertise in applying tools for information navigation and coaching self-directed learning skills. Few libraries bring sources of revenue attractive to academic deans for partnerships. Access to information resources and

facility maintenance for learning environments are viewed as fiscal expenditures more than contributors to the creation of knowledge central to the academic mission. Reaching common ground and creatively identifying goals and commitments to achieve them is a powerful strategic tool that the Future Search conference can offer. Though perhaps not the primary objective, this process produces excellent data for drafting meaningful long-term strategic plans.

But the applicability of Future Search must also consider the library's capacity to fully engage in it. Its success requires time, energy, political strength, commitment and modest funds (approximately $35,000 in today's dollars was spent on the Drexel process) to put in motion.   Equally important is the capacity to dedicate leadership commitment and administrative follow-up after the conference to fuel the infrastructure of working groups, communications, and project management to pursue identified actions through volunteers and staff.   This post-conference activity is underestimated in most reports of the Future Search approach to planning, but as the Drexel case illustrates, is very important to maximize the investment in the conference collaborative planning.

The experience of individuals who would participate in the Future Search process itself must also be considered. Participants in this case characterized their experience as generally positive. Two said they would consider using the method for future planning efforts of their own. Others found the process "fantastic," "fun," or "inspiring." There were a number of comments about the structure of the conference, finding it well organized, though perhaps "a little over-structured." One participant was frustrated by the inability to influence or adapt the methodology, to "sharpen it up," to shorten the process. Another commented that "It would serve them well to see how Future Search could be made more modern" through the use of technology or collaboration tools. One leader noted that the process likely accomplished more, in less elapsed time, than any traditional, linear strategic planning would have. Balancing this viewpoint, another interviewee said that at a point when participants were questioning the process, the facilitators said 'trust us, it will all come together' and that it did. In the end, they said, "we all got it."

Insights gained from research assessing Future Search have not been fully integrated into the facilitated execution of the process. Reports of Future Search conferences mostly describe the characteristic components of membership size, duration, and tasks.   Little mention of post-conference activities are found beyond the prediction of increased capacity for system change as a result of stimulating volunteered leadership and work to accomplish action plans identified during the conference. Yet, Olsen's research observed that "a Future Search conference can maximize its potential to achieve the desired results when a strong core group accepts the overall responsibility for networking with participants before, during, and after the event."[36] Research also advises that,

Despite these important people, it is up to the leaders to fulfill the following criteria: Credibility, so that participants and others will place their trust in the process. Capability, which is having the resources to get essential follow-up tasks accomplished. Stability, so membership does not vary from one month to the next and so that participants perceive the process with a sense of consistency. Commitment, so members have both the will and the motivation for their task. And finally, adaptability is important to be

able to keep participants aligned with the overall vision emerging from the conference, while being open to new ideas and actions that will inevitably enrich this vision of a large scale event.[37]

Evidence from reflections of this case study's participants reinforces other research that leadership is essential to success.

After the conference the role of leadership is the most important. When the event is over, the leadership role can either revert back to the original sponsor or advocate for the conference or planning committee, or it can be transferred or assigned to a newly created person or team. They must demonstrate their commitment and be prepared to lead in a new paradigm of strategic planning and learning.[38] They will play an important role in holding committees or planning groups accountable to their action plans and tasks. They must also act in a supporting role to make sure they have the resources and especially time to devote to their action items from the conference. They must act as overseers and supervisors to encourage consistent progress.[39]

This case of Future Search was not unusual, with expectation of diverse ownership of initiatives to help position the Libraries within the campus academic enterprise and culture. Initially the Libraries' leadership, however, hesitated to trigger program improvements and instead focused on developing the strategic directions for inclusion in the campus five-year strategic plan. The leadership team found that only where leadership was provided did participants willingly assume follower roles and help to execute changes. For example, the strongly expressed idea of the Libraries becoming the focal point for facilitating cross-disciplinary interactions and building bridges across academic silos saw no activity immediately after the conference. Yet an invitation months later from the Libraries to individuals providing coaching for students [e.g. for mastering writing, English as a second language, technology applications, and assessment of basic learning priorities] beyond-the-classroom was enthusiastically accepted and evolved into self-managed projects to explore innovative shared services and managing teaching objects online. Similarly, a small group of faculty participants was happy to serve in an advisory capacity when invited to help the Libraries launch a cross disciplinary faculty and professional staff gathering program; they contributed to its naming, ScholarSip, its schedule and identifying "food for thought" speakers. Perhaps this lack of shared leadership was partly a result of the conference-identified action areas seemingly falling within the authority of the Libraries and thus others deferring to library leadership.

The conference raised interest and awareness of the Libraries. Although not tapped until after the Strategic Plan was released, the enthusiasm built during the conference has retained participant interest to be asked to engage with the Libraries to improve coaching of students and strengthening connections to scholarship and among scholars. At a minimum, communications, such as updates and progress reports, help to nurture the basis for future partnership. As others note, Future Search "creates an opening [and]….shifts things long enough for bigger shifts to happen."[40]

Conclusions

The Drexel case study adds evidence to the speculation about the applicability of the Future Search process to academic libraries. The approach, if successfully executed with critical conditions in place,

offers a venue to raise awareness and enthusiasm for the library's position and potential contributions to advance the academic mission.   Through an energetic and enjoyable exercise in building a desired future, Future Search can be used to build new relationships among stakeholder participants and between individuals and the ideas that emerge from the conference. Post-conference discussion is important to articulate vision and strategic directions, and leadership and project management are critical, as suggested in this case, for pursuing action plans.

Further research in the library setting is welcome to establish the place of Future Search in administrators' planning tool kits. Several research topics emerged from this case study.   What is the importance of post-conference leadership, and where would it be more valuable placed in the library or elsewhere among campus champions? Does campus controversy or diversity of agendas surrounding the library's future influence conditions for which a Future Search conference is a most appropriate choice for cooperative planning?   Is the two and a half days of face-to-face engagement an essential characteristic of a successful conference or can teleconferencing and asynchronous communication tools be introduced to reduce individual participants' time commitment?   What are reasons why more libraries have not chosen to use Future Search, questioning if it is for lack of awareness or shortcomings of the tool?

The Drexel experience not only raised awareness among library constituents, but the buzz it generated raised pride among library staff. Those few staff who participated in the conference were pleased to partner with others and to hear praise for the work of the Libraries. Research guided by interests of organization development experts might find the library a useful venue to understand the Future Search role in guiding transformation and building stronger strategic plans. What training is required to engage staff at all levels in leaderless teams, collaborative planning and making decisions? Does Future Search provide a trusting and engaging space for staff to risk taking ownership of the organization's future? Does collaborative planning of Future Search impact the position of a library or other support departments within the university's spheres of influence to advance its mission?   Are there other group intervention techniques to equip a library or other academic organization to improve its transformation in times of intense change?

Unquestionably Future Search is a thoughtful and democratic approach to planning. It demands discipline to execute but delivers a focused energy for change. Its value is increasingly recognized in a variety of areas. Libraries, to continue being valued partners within institutions of learning and scholarship, should be well-versed in its philosophy, conditions for success, and techniques to administer. Appropriately selecting this highly engaging and collaborative approach to shaping a library's future is evidence of librarians' maturity as leaders and commitment to holistic improvement of the academy, beyond their specific concerns for operating the library services and resources.   More cases will expand our experiences with Future Search, and reported systematic evaluation of them will strengthen our understanding of the usefulness of this approach.

Danuta A. Nitecki (dan44@drexel.edu) is Dean of Libraries and Professor, College of Information Science and Technology at Drexel University. **Jennifer Livingston (**jennifer.livingston@drexelmed.edu) is Manager, Training and Organizational Development, Drexel University College of Medicine. **Gerry Gorelick** (ggorelick@aol.com) is President, Gerald Gorelick & Associates. **Suzanne G. Noll** (sgn23@drexel.edu) is Director of Learning and Development, Drexel University Human Resources.

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[6] Michael A. Germano and Shirley M. Stretch-Stephenson, "Strategic Value Planning for Libraries," *The Bottom Line: Managing Library Finances*, 25 (2012), 71-88. http://dx.doi.org/10.1108/08880451211256405. Among specific descriptions of planning efforts, MIT and Yale Law Libraries note the engagement of staff and customers. MIT designed the process as an administrative activity with staff engagement only as needed; day-long retreats of library administrators and some staff were held to address vision, strategies, and directions for the future. See: Shirley K. Baker, "Strategic Planning for Libraries in the Electronic Age," *Proceedings of the IATUL Conferences*, 1989, Session 2, 201, accessed January 20, 2013, http://docs.lib.purdue.edu/iatul/1989/papers/2. Similarly, the Yale Law Library director described using the strategic planning process with an appointed staff task force for its third plan in a decade. Interviews, focus groups and surveys of students and

faculty complemented staff research and helped confirm directions. See: "Blair Kauffman Talks About Yale Law Library Strategic Plan" (video) in Yale Law Librarians, accessed January 20, 2013, http://vimeo.com/13714514.

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