Establishing Shared Purpose: Developing Unit Specific Mission, Vision, and Values in an Academic Library

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Introduction

The Public Services unit in an academic library is often comprised of diverse professionals doing complex, user-focused work in a rapidly changing environment. In this setting at UNC Charlotte, the leadership for Public Services wanted to provide a solid foundation for communication, collaboration, and shared decision-making. To complement the library's strategic plan and defining statements, the unit undertook to develop mission, vision, and values statements to highlight their unique purpose and provide direction for their work. In late 2017, the library hired a new Head of Research & Instructional Services (RIS). The Associate Dean for Public Services and the Director of Access Services had been in their positions for just over a year. With such a new leadership team, it became more important than ever to establish common goals and a sense of connection across the unit. Rather than sharing a preconceived vision early on, the Associate Dean hoped to observe and learn from her new colleagues and find ways to collectively define the mission, vision, and values of the unit. No quick pronouncements were made to define the unit from the top down, in favor of a collaborative, reflective and process-oriented approach to decision-making and change. By the time the new Head of RIS was hired a year later, this approach had led to some uncertainty about the direction of the unit, so the time was right to formally address the strategic plan for Public Services in the library.

The Public Services unit at J. Murrey Atkins Library is comprised of 16 faculty librarians in Research & Instructional Services and 16 professional staff in Access Services. Throughout 2018, each group sought to articulate the mission, values, and vision guiding their work. Importantly, each group would undertake a unique and self-directed process to strengthen feelings of pride and ownership towards the final statements. Some experience suggests that communication and mutuality can be a challenge between faculty and staff employees in academic libraries; the goal was for the development of these statements to increase understanding, respect, and shared purpose across the unit. Thus the Director of Access Services and the Head of RIS were charged with the task of having their teams develop mission, values, and vision statements, not for the products alone, but using the process to strengthen collaboration and camaraderie within each area and across Public Services. The intention was for the smaller group processes to later come to inform the work and collaborations of the unit as a whole.

While there is much discussion of academic libraries aligning their mission, vision, and values with the goals and missions of the parent institution, there is less literature discussing specific departments doing this work.[1] The process of creating mission, vision, and values is often discussed and documented within the for-profit sector, where definitions and guides for creating the statements are provided; yet, comprehensive guides for academic libraries are difficult to locate. Often, throughout this process, the Public Services leadership team wished for a concise formula to provide quick definitions and guide the creation of mission, vision, and values. It is the hope of the authors that this experiential report will provide definitions and guiding questions to inform colleagues working in academic libraries that wish to lead the development of these defining statements within their own contexts.

Access Services

Access Services began by defining "mission" using Mark Fenner's description that a "mission statement should boldly answer the question of what you do and why you do it. The 'why' part of the mission statement provides purpose. It should motivate and inspire."[2] The Access Services conversation to draft its mission began with defining excellent customer service. This discussion helped the group transition to outlining its fundamental purpose, shared direction, and organizing guidelines. It was helpful to ask questions that defined the mission: "Who are you as an organization? Whom do you serve? Why do you exist?"[3] Frequently throughout the process, motivation and inspiration served as touchstones that the team referenced during "inspiration checks." If the team was not feeling especially inspired or motivated by the statement in progress, this was a sign that there was more work to be done. After several drafts and edits, Access Services decided on the following mission statement: *The mission of Access Services is to connect our diverse community to library and global resources through outstanding patron service.*

Access Services was guided by the following definition for values: "They are guiding principles that never change. Values are why you do what you do and what you stand for. Values are deeply held convictions, priorities and underlying assumptions that influence attitudes and behaviors."[4] A guiding question for developing values was: "What are the deeply held convictions, priorities, and underlying assumptions of Access Services?"[5] After reviewing the definition and importance of values, team members were asked to record values that were important to them on post-its and place them on a wall where the Director of Access Services led discussion and organization of the results into themes. This silent brainstorming activity helped the team avoid groupthink by allowing shared and unique knowledge to be considered in a common platform, while also honoring members of the team who prefer to think and share silently.[6] It is generally suggested to keep the list of values between five and seven; Access Services agreed on five: *access, collaboration, adaptability, integrity, and kindness.* Brief statements were then established to accompany each value.[7]

The descriptions of vision that guided Access Services were located in the *Balanced Scorecard Step-by-Step for Government and Nonprofit Agencies* by Paul R. Niven. Most helpful during the process was the statement declaring, "a vision statement provides a word picture of what the organization intends ultimately to become."[8] Guiding questions for vision development were: "What makes us unique? How would the world be improved or changed if we were successful in achieving our purpose?" and "What do we want to become?"[9] The process of creating the vision statement for Access Services began with supervisors reflecting on the recently created mission statement and considering aspirational goals for the group. The resulting statement was brought to the larger group for revision and "inspiration check." The completed Access Services vision statement reads: *Access Services at J. Murrey Atkins Library will set the UNC Charlotte standard for outstanding customer service and camaraderie among colleagues. We will provide efficient and convenient access to library resources, while creating a welcoming environment and anticipating the needs of every patron. We will always go the extra mile for our library users. We will be supportive of our colleagues by practicing empathy, appreciating each other, and trusting that each one of us is always doing our very best work.*

During this process, it was important to be mindful of the already established defining statements of J. Murrey Atkins Library; however, the team rarely referenced the existing statements until unique drafts for Access Services were created. It is sometimes assumed that defining statements should be exclusively externally focused; however, balancing external and

internal elements is recommended and creates a holistic view of purpose and direction for the group.[10] Access Services included internal elements in the vision statement by addressing camaraderie among employees, support, empathy, trust, and appreciation for each other.[11] Once defining statements were finalized for Access Services, the team reviewed the process and examined their most successful collaboration techniques to establish meeting norms. The completed list of meeting norms for Access Services included elements related to active listening, respect, and reservation of judgement.

The immediate results of this project have been overwhelmingly beneficial for the Access Services team. During discussions regarding service models and improvements, the statements serve as touchstones providing guidance towards a shared purpose. A few months after the completion of this project, a team member presented a poster connecting a new service improvement in Collections Maintenance to the Access Services values. Witnessing colleagues happily assuming accountability for these defining statements has been especially exciting. Finally, it was serendipitous that near the end of this Access Services project, the ACRL Access Services Interest Group (ASIG) shared a draft Framework for Access Services Librarianship, which included a definition of Access Services: "Access Services develops and provides services that connect library users to library resources. Access Services is the primary point of contact for library users. It strives to make the library user's experience positive and rewarding.[12] The predominant elements of the newly written mission statement for Access Services at Atkins were clearly articulated in the ASIG definition. Both statements mentioned connecting users to library resources and providing positive patron experiences; these similarities supported additional evidence of success.

Research and Instructional Services

To prepare for the significant work of developing mission, vision, and values, the Head of RIS considered it important to first develop meeting norms as a means of facilitating respectful and clear communication. Norms were developed at a weekly departmental meeting, with several identified norms emerging in three major thematic areas: respect, engagement, and mindfulness. Once these meeting norms were developed, the head of RIS talked to the Head of Access Services about the materials used as a basis for her work in developing mission, vision, and values. Using similar materials would allow for some consistency in the outcomes of the two groups. As with Access Services, the definition of mission, vision and values for RIS was inspired by the work and definitions of Mark Fenner. The work of Chris Gostling provided additional guidance. With a business focus in his approach to developing these statements, one important question Gostling asks is "Why are we running this business?"[13] While the work of RIS is not corporate, the foundational questions of why we do the work we do proved important for the group to consider.

For RIS, the development of mission, vision, and values was initially planned as a day-long retreat. The head of RIS developed activities and exercises to help spark the imagination of the department, allow for self-reflection, and inspire a positive dialogue between all members of the team. Activities were wide-ranging and included some pre-work, such as reviewing existing mission statements of organizations and reading Fenner's description of mission, vision, and values. The day started with an icebreaker activity unrelated to the primary work of the day to serve as a conversation starter. The group then reviewed mission statements from other organizations and discussed what they liked or disliked about them. An important part of the initial conversation was a dialogue about who RIS serves. Major groups identified as being served by RIS were students, faculty, and the larger Charlotte community.

Before drafting its mission and vision, RIS defined its values. Developing a list of values was accomplished through affinity mapping, which allows for "organizing related facts into distinct clusters."[14] Each member of the group had three minutes to write down values they thought were important for RIS. They then came together in groups of four to five to see which values overlapped and to further refine their ideas. At times consensus was needed, as opposed to total agreement, in order to move the conversation forward. This approach meant that while most values identified by the group as a whole had buy-in from the majority of RIS, not every person necessarily agreed with each individual value that the group came up with. These conditions were not a negative for the group, and most values were generally agreed upon. The values that RIS identified were: *diversity and inclusion, community, curiosity, innovation, equity, and empathy*. A short sentence to define each value was also developed at this time to situate each value in the work of the group.[15]

After defining its values, the group then began drafting its mission. A review of a few key mission statements (including the J. Murrey Atkins Library mission statement) began this drafting session. Everyone then had time to work on a mission statement on their own and gather into new small groups to discuss their individual statements. After a group discussion of essential elements and commonalities, the entire group began drafting a mission statement together. While the group did eventually come together and agree on a statement, the process was not without struggle. Feedback from some members of the group indicated they would have liked some time to work individually outside of the meeting before coming together. This process also took more time than initially expected. While the early plan was to draft the entire mission, vision, and values statement during the one day-long retreat, the Head of RIS recognized that the team had been effectively engaging all day and was experiencing some fatigue after such productive conversation. It was decided to delay the drafting of the vision statement to a later date.

Based on feedback from the mission-crafting process, the Head of RIS requested that everyone take two weeks to reflect on the work so far completed and individually write their own vision statement. After this time of independent work, the group tackled as the sole agenda item for a weekly meeting the task of articulating a common vision. During that meeting a "speed dating" activity had each person share the vision they had written with another member of the department. During this activity, members of the group began editing their own vision as they took suggestions and constructive feedback from each other. Once the initial speed dating activity was done, everyone was able to share what they had written or talk about what they liked that someone else had written. Ultimately the group came together to have a single vision statement: *RIS will empower the community to critically engage with the world to discover, connect, and innovate*. After all components of the RIS draft were crafted, each member of the unit had time to go back and look at each part for further reflection. There was one last time during a department meeting where feedback was solicited, before a final draft of mission, vision, and values was created.[16]

Reflection and Outcomes

During the six month drafting period for Access Services, documents containing statements in progress were shared regularly via email and comments and feedback were encouraged from all employees. This timeline was beneficial in allowing space for thought and reflection before new drafts were presented in subsequent meetings. Once content was finalized, the Director of Access Services collaborated with the library's Graphic and UX Designer to design a unique poster portraying the new mission, vision, and values of Access Services. Signatures were gathered from all team members on one mission, vision, values poster to be displayed in a public area. The group agreed that these defining statements were a

contract created with colleagues and users, thus, it was appropriate to be displayed in a public area. Moving forward, the Access Services team will regularly refamiliarize themselves with the defining statements during yearly team building workshops. Lastly, the team will incorporate the introduction of these defining statements into the onboarding process for new employees.

RIS completed its meeting norms, mission, vision, and values over a four month period. Inspired by Access Services, the Head of RIS also had the final draft of these statements printed and placed in the communal copier and mail room where all members of RIS could see them regularly. The Head of RIS also shared the work with the Dean of the Library during one of their one-on-one meetings. This step was important as it allowed for a good understanding of the foundation for future work in RIS. The Head of RIS plans to identify ongoing and future projects that can be aligned with the values of the department. Members of RIS can thereby reflect on their current work and ensure it is supporting the values and mission that they worked so hard to develop and identify.

The creative, team-building process has been extremely successful and gratifying for everyone involved. Not only have the two groups produced high-quality, inspiring statements, but the process has built energy and camaraderie among employees. The brainstorming and consensus building workshops and meetings have led to productive conversations and improvements in group communication. After completing their respective statements, the two groups, Access Services and Research & Instructional Services, met together for lunch and discussion. In considering notable and shared features of each group's mission, vision, and values statements, people commented on the shared emphasis on connecting and engaging with our community, the student-centered focus, and the collaborative, team-oriented approach. Further discussion focused on the way each group supports the work of the other, how our attitudes towards our colleagues impact our support of patrons, and the way all kinds of work in Public Services allows us to empower our patrons. Employees in both groups noted the emphasis on camaraderie and empathy in both sets of statements. These natural similarities in the conversations and products of this process highlight the common ground in the goals and priorities of both sides of Public Services. We anticipate that emphasizing that commonality will bring the process full circle to strengthen understanding and cooperation across the unit.

Maintaining the success and momentum of this process will be important to ensuring its long-term value. We don't want the time and energy expended in undertaking this work to be lost as we move forward with other projects. Printing and displaying the statements visibly for ourselves and our patrons will keep these efforts fresh in our minds. Focusing on common values and goals across the group will also prove valuable as we explore the possibility of combining service desks over the coming year. In the joint lunch discussion, the group shared their thoughts on what will be great about working together at a shared desk, and what our next planning steps need to be. Additionally, we have plans for ongoing customer service training and a common customer service philosophy; these statements can guide those conversations and provide a foundation for decisions about responding to patrons positively and consistently. Since we have explicitly included care and empathy in our values on both sides, we hope to nurture those values with continued discussions of how they look in practice and in the context of our work.

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ACCESS SERVICES
MISSION – VISION – VALUES
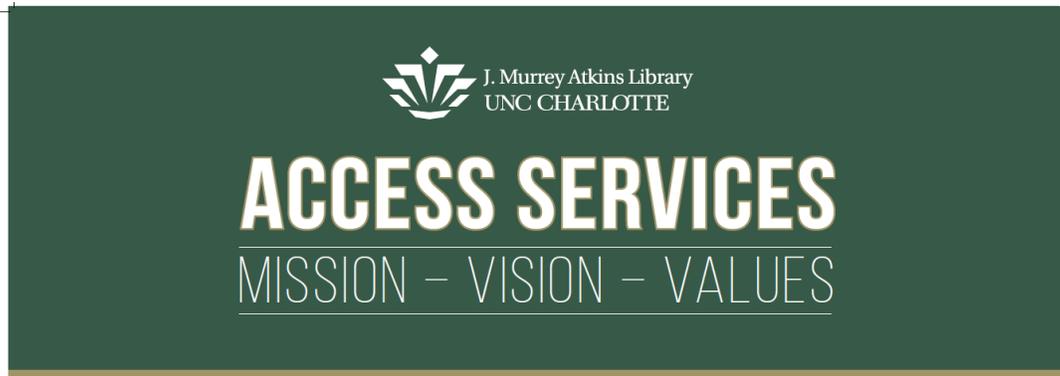
MISSION

The mission of Access Services is to connect our diverse community to library and global resources through outstanding patron service.

VISION

Access Services at J. Murrey Atkins Library will set the UNC Charlotte standard for outstanding customer service and camaraderie among colleagues. We will provide efficient and convenient access to library resources, while creating a welcoming environment and anticipating the needs of every patron. We will always go the extra mile for our library users. We will be supportive of our colleagues by practicing empathy, appreciating each other, and trusting that each one of us is always doing our very best work.

VALUES

ACCESS
We make library resources readily and equitably available to all library users.

COLLABORATION
We are stronger as a team.

ADAPTABILITY
We are flexible, bringing positivity and resourcefulness to new and challenging situations.

INTEGRITY
We are thorough, transparent, and accountable in all of our work.

KINDNESS
We cultivate and maintain an atmosphere of care, empathy, and respect.

J. Murrey Atkins Library
UNC CHARLOTTE

RESEARCH & INSTRUCTIONAL SERVICES

MISSION – VISION – VALUES

MISSION RIS engages individuals and communities through instruction, resources, and programming to be lifelong critical thinkers.

VISION RIS will empower the community to critically engage with the world to discover, connect, and innovate.

VALUES

EMPATHY
We strive to anticipate and understand the needs of our users.

DIVERSITY AND INCLUSION
We enrich our users by developing diverse collections, instruction, and programming and we are dedicated to creating a welcoming environment for all.

COMMUNITY
We build connections and partnerships within the library, across campus, and throughout the community.

CURIOSITY
We encourage growth and exploration through collections, instruction, and programming to advance the self-motivated pursuit of knowledge.

INNOVATION
We explore and implement new practices and reflect on our experiences.

EQUITY
We are committed to equitable access to high-quality education, services, and information.

References

[1] Cottrell, "What Are We Doing Here, Anyway?"

[2] Fenner, "Mission, Vision, Values: Essential Foundation," 31."

[3] Niven, *Balanced Scorecard*, 109-114.

[4] Olsen, *Strategic Planning for Dummies*, 105.

[5] Olsen, *Strategic Planning for Dummies*, 105.

[6] Rogelberg, *Surprising Science of Meetings*, 108-109.

[7] See Appendix 1.

[8] Niven, *Balanced Scorecard*, 121.

[9] Niven, *Balanced Scorecard*, 121-124.

[10] Niven, *Balanced Scorecard*, 122.

[11] See Appendix 1.

[12] ACRL Access Services Interest Group, "Framework," draft.

[13] Gostling, "Mission, Vision, Values Exercise."

[14] Pernice, "Affinity Diagramming."

[15] See Appendix 2.

[16] See Appendix 2.