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**Building Strategic Consensus: A Grassroots Planning Process**

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Land Acknowledgement

We acknowledge that we are on the traditional territory and homelands of the Ramaytush Ohlone people. We are guests on this land and have committed ourselves to listening to and supporting indigenous people.
Black Lives Matter

We aim to work vigorously for freedom and justice for Black people and, by extension, all people.

We acknowledge, respect, and celebrate differences and commonalities.

We also acknowledge the roles our institution and many other academic libraries play, both historically and today, in the ongoing subjugation of Black people and the intersections between librarianship and systemic racism.

We affirm that Black Lives Matter.
Building Strategic Consensus

A grassroots planning process

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Learning outcomes

Identify & develop:

1. Key components of a strategic plan
2. Approaches to designing strategic planning processes
3. Project risks and risk mitigation techniques
Strategic Plan components

- **Mission, Vision, & Values**
  - Why does our organization exist?
  - Where do we want to go?
  - What are our priorities?

- **Goals** (how we will achieve our vision)
  - **Objectives** (how we meet our goal)
    - **Tactics** (action plan)
Gleeson Library: Mission, Vision, Values

Mission
The Library provides the resources, services, and spaces to develop the whole person, and actively engages the USF community in its educational, social, and scholarly activities.

Vision
The Library is an exemplary place for contemplation, inquiry, and engagement whose impact is felt throughout the university. As a collaborative and forward-looking organization, we are a central partner in ensuring student success, faculty and staff excellence, research innovation, and social responsibility.

Values
• Access • Teaching and Learning • Intellectual Freedom • Integrity • Collaboration • Innovation and Creativity • Diversity, Equity, and Inclusive Excellence • Social Justice • Compassion • Community • The Whole Person •
Gleeson Library: Goal, Objective, Tactic

**Goal**: Promote diversity, equity, and inclusive excellence in everything that the Library does.

- **Objective**:
  Prioritize the recruitment, retention, and success of historically underrepresented groups.

  - **Tactic**:
    Design and implement an onboarding, mentoring, and retention program that is framed by a DEIE perspective.
Exercise #1

What are the two biggest challenges to strategic planning in your organization?
Gleeson Library Strategic Planning

Identify & address challenges and opportunities:

- Instruction, liaisons, other services
- Library organization
- Alignment with University goals
Gleeson Library Strategic Planning

Identify & address challenges and opportunities:

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- Library organization
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Keeping in mind:

- Transparency
- Inclusivity
- Engagement
Developing the Plan

- Started with program review
- Engaged external consultants
- Included all staff
  - Brainstorming, sharing out, voting
  - Town Hall discussions/refinement
  - Role of leadership/administration
- Tools
  - Shared documentation
  - Slack
  - Airtable
Implementing the Plan

6 Goals, 22 Objectives, 66 tactics

- Prioritized tactics by Year 1, 2, or 3
- 6 Task Forces & 7 Working Groups
  - Staff facilitators
  - Leadership team “sponsor”
Progress to date

What has worked…

● Buy-in and engagement
● Ownership of the process
● Cross-unit collaboration
Progress to date

...And things we need to adjust:

- # tactics and groups
- Realignment (liaison, reference, instruction, organization)
- Timelines and implementation
  - Impacts of COVID-19
Realignment and mitigation strategies

- Regular town halls to solicit feedback
- Meetings with groups and/or facilitators
- Resetting tactics
- “Pump the brakes” and “push pause”
<table>
<thead>
<tr>
<th>Group</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILS &amp; LSP Task Force</td>
<td>● Completed December 2019*</td>
</tr>
<tr>
<td>Information Literacy Instruction Working Group</td>
<td>● Proceed according to work plan</td>
</tr>
<tr>
<td>Staff Development Working Group</td>
<td>● Proceed according to work plan</td>
</tr>
<tr>
<td>Staff Diversity Task Force</td>
<td>● Proceed according to work plan</td>
</tr>
</tbody>
</table>
| Collection Diversity Task Force           | ● Complete general collection development philosophy by Aug 1; hold collection-specific policies and reevaluate for year 2  
                                           | ● Implement GOBI DEI award approval plan by June 1                              |
| Library Organization Task Force           | ● Proceed with review of organization as planned                                
                                           | ● Move departmental meetings tactic to ADs, remove from plan                   |
| Reference Working Group                   | ● Complete reference services recommendations by end of June                   
                                           | ● Ticketing system - completed                                                  
                                           | ● Hold OA/OER work and evaluate for later in plan                              |
| Special Collections & Archives Task Force | ● Submit service point recommendation by May 1                                 |
| Liaison Working Group                     | ● Hold, reevaluate work for year 2                                              |
| Technology Discovery & Assessment Working Group | ● Ticketing system - completed                                               |
|                                           | ● Discharge group, move remaining tactics to Systems department               |
| UX & Data Analytics Working Group         | ● Discharge group, move tactics to Systems department                          |
| Assessment Task Force                     | ● Discharge group, reevaluate work for year 2                                  |
| Facilities Working Group                  | ● Discharge group, put tactics on hold                                          |
Next steps

Planning for remaining tactics/years 2-3 of plan

● Year 2 slated to kick off September 1, 2020
  ○ Consider impacts of COVID-19

● Expect fewer tactics and groups, more involvement and direction from library leadership

● Opportunity to focus on what is really critical
Exercise #2

Stump the panel: ask us anything!
Thank you!

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