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Goalstorming: Aligning the Strategic Plan with Staff Values

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GOALSTORMING

ALIGNING THE STRATEGIC PLAN WITH STAFF VALUES

Bethany Davis, Lisa Gardinier, & Sara Scheib

University of Iowa Libraries

Strategic Planning

Overall Process and Timeline



Phase 1: Self Study

- 8 team members (appointed by University Librarian) including:
 - *1 library assistant, 1 non-librarian professional, 5 librarians, 1 department head.*
 - *HR Director as facilitator.*
- Methods:
 - *Local and national environmental scans;*
 - *Staff survey (69 responses);*
 - *49 individual staff interviews and 5 committee interviews (35 participants);*
 - *9 focus groups (50+ participants).*
- Results: 61 pages (including appendices) with 24 specific recommendations. Report divided into four sections (Collections, Services, Infrastructure, Administration);
 - *1 subcommittee with 4 members for each section; Each team member served on two subcommittees.*
 - *Report completed after 1 month extension and submitted to the Provost.*

Phase 2: External Review

- Review Committee Members:
 - *5 internal (2 administrators, 3 faculty)*
 - *2 external (University Librarians from peer institutions)*
- Methods:
 - *Faculty survey;*
 - *Open forum with library staff;*
 - *Confidential email account to submit comments;*
 - *Meetings with Libraries' Administrative Group, management team, and Self Study Team;*
 - *Meetings with Deans, Associate Deans, and other constituents (SLIS, Faculty Senate, student government, etc.)*
- Results: 14 specific recommendations. Report submitted to the Provost and University Librarian in June 2014. Shared with library staff in July.

Phase 3: University Librarian Response

- In August 2014, UL solicited staff feedback on the External Review Report through:
 - *4 focus groups (60 participants);*
 - *Survey to rank recommendations (73 responses);*
 - *Email comments directly.*
- Proposed actions for all 14 external review recommendations in the following themes:
 - *Strategic Plan*
 - *Development*
 - *Library Services, Collections, and Spaces*
- Shared draft response with the Self Study Team to solicit feedback. Final response submitted to Provost in December 2014.

Phase 4: Strategic Planning

- Facilitated by UI Organizational Effectiveness, managed by Strategic Planning Process Team
- Strategic Planning Group members appointed by University Librarian:
 - *University Librarian*
 - *3 Associate University Librarians*
 - *HR & Finance Directors*
 - *4 librarians, 1 non-librarian professional, 1 library assistant*
- Results: Plan formally adopted in June 2015, including:
 - *Mission, vision, and values statements;*
 - *33 “areas of focus” arranged within 4 goals, mirroring the UI’s four strategic priorities*

Phase 5: Action Planning

- Goal: Involve library staff in the implementation of the strategic plan and communicate results.
- Action Plan Team: Open call for nominations; nine team members selected (8 librarians, 1 non-librarian professional); AULs serve as liaisons.
- Guiding documents: Team mission and charge, Framework, Process, Template, Guide, Examples
- Process: designed by Team with the approval of AUL liaisons
 - *Planning: proposals created by any staff member; submitted to the Team;*
 - *Review: Team reviews proposals; revisions suggested; recommend to Admin for adoption*
 - *Implementation: Plan leaders submit periodic progress reports; Team provides feedback*
 - *Completion: Plan leaders review outcomes and submit final report.*

PARTICIPATORY ACTIVITIES

ENGAGING STAKEHOLDERS IN THE PLANNING PROCESS



Participatory Activities

- Focus groups
 - *Library staff (x4) and faculty (x2)*
- Online surveys
 - *Library staff, faculty, and students*
- University-wide Deans' meeting
- All-library-staff meetings
- Library departmental meetings
- Sharepoint (intranet) blog
- Strategic Planning Group email
- Goalstorming

Library Staff Focus Groups

- Shared draft versions of Libraries' mission & vision statements in advance via email.
- Included a prompt for brainstorming library values.
- Gauged the groups' reactions using the "6 Ls" scale & moderated open discussion.
- Brainstormed library values.
- Evaluated each focus group's experience using Plus/Delta.
- Concurrent online survey.

Strategic Planning Staff Focus Groups

January 2015

Statement Evaluation

Vote on the mission and vision statements using the following scale:

Love it Like it Live with it Let's discuss it Lament it Loathe it

Voting will be used as a conversation starter with discussion to follow.

Previous Mission Statement (rev. 2002)

The University of Iowa Libraries, in partnership with the University's academic departments, provides access to information resources and services supporting scholarship, creative endeavors and clinical care.

Proposed Mission Statement 1

The University of Iowa Libraries is the center of inquiry for the University of Iowa and the State of Iowa; advancing discovery, scholarship, and teaching among students, researchers, and clinicians through forward-looking collections, open and equitable access to information and innovative services.

Focus Group Handout

Brainstorming

Generate words and short phrases describing the UI Libraries' values. An example of the University of Iowa's values is provided for reference.

Values

A **value statement** is a declaration that informs customers and staff about the Libraries' top priorities and core beliefs.

Example: The University of Iowa's values in the 2010-2016 Strategic Plan:

Core Values: In planning, setting priorities, and carrying out every aspect of its mission, The University of Iowa is guided by seven interdependent values:

**Excellence | Learning | Community | Diversity | Integrity |
Respect | Responsibility**

What are the UI Libraries' values?

Deans' Meeting

- Modified questions from the Harwood Institute
 1. What are your aspirations for the University Libraries?
 2. What challenges do we face in reaching these aspirations?
 3. What needs to change in the community to reach our aspirations?

Student Survey

Are you an undergraduate student or a graduate student?

- Undergraduate
- Graduate
- Other

How would you rate the services you use from the UI Libraries?



What changes would make the UI Libraries more valuable to you in the future?

 THE UNIVERSITY OF IOWA
LIBRARIES

If you are a student, will you please help us by answering a couple of questions?

[Let's do this!](#)

Data Collection & Analysis

- Collected stats for every event (i.e. focus groups)
 - *Number of participants*
 - *Number of votes during “6 Ls”*
- Took copious notes
 - *Designated note taker recording comments without names*
- Synthesized focus group and survey data into 1 crosswalk
 - *Master list of concepts grouped under goals*
 - *Became the content for goalstorming*

UI LIBRARIES_STRATEGIC PLAN_CROSSWALK

Source Code at end of document

Develop a model for organizational effectiveness.	A7
Provide staff with additional support for grant writing with an eye to increasing grant funding to pre-recession levels and beyond. (P1,2,3,4)	A8
Repurpose the Hardin Library for the Health Sciences and explore naming rights to help fund the renovations.	R8, UL11, SV(7)

Goal Area 2: Advancing Knowledge & Practice

The final goal statement (or tailoring of the above mentioned UI pillar as one of the four UI Libraries' Strategic Goals) will be shaped by Libraries' staff input at Goal-Storming events.

Synthesis (emerging Objectives)	Source
<p>2-1. Partner with faculty for collaboration and support of research.</p> <p><i>Examples of potential activities/projects for Action Plans:</i></p> <ul style="list-style-type: none"> -Create/enhance physical environment and lighting for faculty and students. 	LC
<p>2-2. Promote enhanced Data Management for heightened visibility and longevity of faculty and student research</p> <p><i>Examples of potential activities/projects for Action Plans:</i></p> <ul style="list-style-type: none"> -Education and advise regarding data management. -Design and implement a data publishing service 	LC
<p>2-3. Provide robust publishing services for faculty and student work.</p> <p><i>Examples of potential activities/projects for Action Plans:</i></p> <ul style="list-style-type: none"> -Educate and advise regarding publishing, intellectual property (copyright consultation) -Provide alternative publishing models (open access) 	LC

Data Crosswalk

Source Codes: (in alpha order)

AUL=Associate University Librarians

Source: (Feb. 2015) The AULs and Senior HR Leader meet to synthesize data into the four Strategic Plan, drafting this "Crosswalk" document. Possible gaps in goals identified by this labeled "AUL."

C=Collections, S=Services, I=Infrastructure, A=Administration

Source: (July 2014) Report of the Review Committee to Provost, from UI Libraries Review

FFG=Faculty Focus Groups, FS=Faculty Survey

Source: (Feb. 2015) Faculty participating in focus groups and survey to generate areas of focus for Libraries' Strategic Plan. (Aspirations, Challenges, Changes)

LC=Leadership Council

(Feb.-Mar. 2015) Source: Volunteers from the Leadership Council, the AULs, and Senior HR synthesize the first draft of the crosswalk into the potential goals under the four pillars of Plan.

R=Recommendations

Source: (Feb. 2014) *University Libraries Self Study Report*, from Self-Study Team

STS and STS-G

Source: (Mar. 2015) Undergraduate and Graduate & Professional Student Survey.

SV=Staff Vote

Source: (Aug. 2014) Staff Survey. The number cited represents votes received for recommendations from a total of 73 respondents, or approximately half of UI Libraries staff. ("Three most important recommendations from the Review Committee Report,")

Source Code: See last page

Last updated: 031915

GOALSTORMING

AN ACTIVITY TO MEASURE STRATEGIC PLANNING PRIORITIES



Activity Objectives

- To gather quantitative data measuring staff priorities of potential strategic planning goal content
- To engage all library staff in the goal drafting stage of the strategic planning process

Resources: The ILA-ACRL Version

- Flip chart & markers
- Colored paper (3 colors)
- Containers for voting
- Prepared goal components

Resources: The UIL Prototype



- Flip chart & markers
- Pre-assembled “concept” slip packets
- +1/meh/nope voting bins bins
 - *Recycling bin optional!*
- Markers, scissors, post-its for participant modification

Activity Process

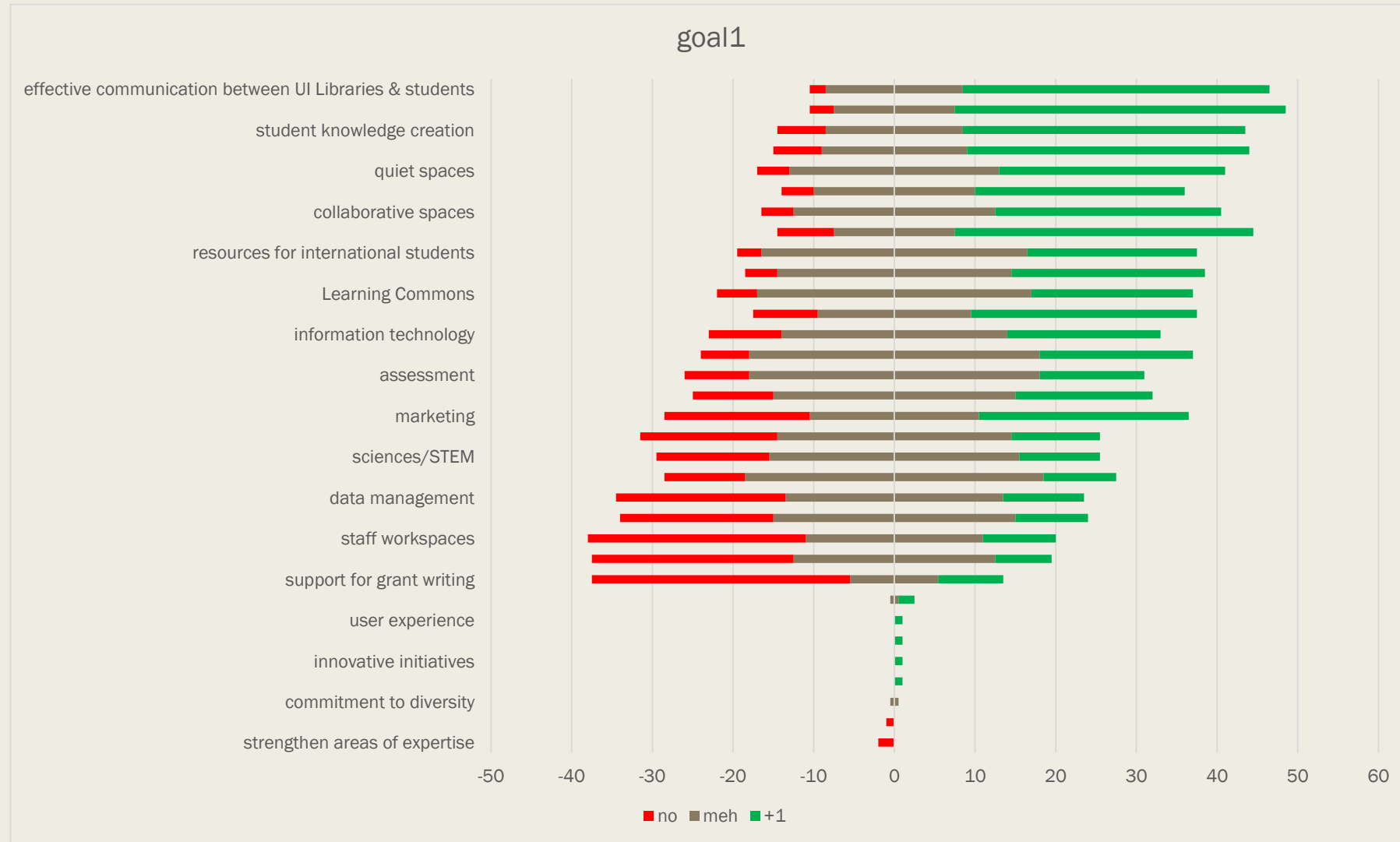
- Participants read the goal concept at the station.
- Participants consider the supporting concepts and indicate +1, meh, or nope.
 - *+1: Yes, this should be in the final goal!*
 - *meh: This might be important, but maybe for an action plan.*
 - *NOPE: This is unimportant for the organization's future.*

Goalstorming the ILA-ACRL!

The digital version:

<http://tinyurl.com/goalstorming>

Results



THANK YOU!

Questions?

