

Designing a Blueprint for Libraries with **ocula** ∴ ontario college and university library association

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Session Outline

- ❖ Poll and overview
- ❖ Case study: OCULA strategic plan
- ❖ Strategic planning, OCULA style
- ❖ Planning OCULA initiatives (group activity)
- ❖ Selling your ideas (group pitches)
- ❖ Wrap-up and questions



Here's a quick look at what we're going to cover. We're going to go through the poll, the case study set-up, and "Strategic planning, OCULA style" rather quickly so that we can spend more time on our group activities. We also want to leave time to wrap it all up and give you a chance to ask questions and have more discussion with us.

I also want to make clear at the outset here that this is going to be a fast-paced session, especially when we get to the activities where we're asking you to put on your thinking caps. If you're someone who likes to think on your feet and come up with lots of ideas right away, you're going to love it. If you're someone who likes to be able to reflect and ponder, think about the implications of the question before you get to the answer, well, you may feel like this is all going too quickly. If that's you, please make sure that you take time later on to digest this and re-think it over.

Poll: Strategic Thinking and You

Have you participated in library-related strategic planning?



Poll: Strategic Thinking and You

If so, is your favourite part of strategic planning:

- a) coming up with the big vision and ideas for what you can do
- b) putting it all together and strategizing about how to write and present it
- c) finishing it and moving on to implementation

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Show of hands – which is your favourite part of strategic planning?
Does anyone have a different favourite part? Does anyone not enjoy any aspect of strategic planning?

Again, we all bring something different to the experience – we all have different preferences and different expertise... we hope you'll find some new ideas here that you can take back with you and that will expand your thinking a bit.

And here, before we go on, I'd like to ask you all just to take 30 seconds and introduce yourselves to the others at your table.

Strategic Planning Overview

- What are we going to do?
- How will we make it happen?
- How will we know it was good?
- How will we brag about it?



Why is strategic planning important and why are we talking about it from OCULA's perspective?

- It helps us figure out what to do and what not to do – this is particularly important and evident with OCULA because we're all volunteers and we are all very aware of the limited time that we have for things, so when a new idea comes up, we refer back to our strategic plan to help us decide whether or not to take it on.
- It helps you at all stages of work by giving you a consistent reference point:
 - planning for what you're going to do
 - implementing it
 - evaluating it – was it good, do we keep doing it

There is a lot of information out there about strategic planning and how to do it. There are several models to choose from and many things to consider.

Keeping in mind our limited time, and our desire to give you some practical takeaways, we are going to focus on these four questions. We think these are questions that can help keep you focused, and also may be questions that librarians often aren't all that good at answering (especially #4 there, how will we brag about it)

Why an OCULA Case Study?

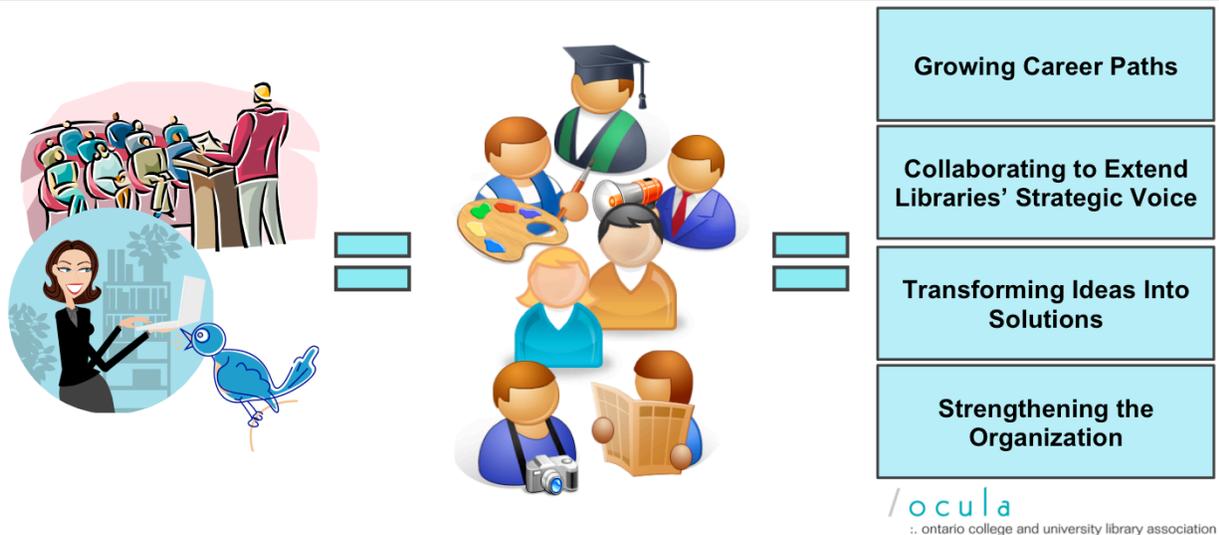
- We all work at different institutions
- Working with an example from a different organization can allow for new perspectives
- OCULA Council will benefit from hearing your perspectives on our association



Why we're using OCULA's strategic plan as a case study for doing strategic planning:

- We all work at different institutions, each with their own quirks, challenges, and benefits, but we all have OLA and OCULA in common – this case study gives us something common to discuss
- You may be able to disconnect more easily from challenges or issues that are specific to your institution, and therefore focus more on the process rather than on barriers to the process.
- By thinking “outside” of your organization, you may be exposed to new ideas and new perspectives that you can bring back to your institution.
- And, finally, so that we, the leadership of OCULA, can take the ideas back to OCULA Council and incorporate them into our strategic planning process as input from our members.

OLA Strategic Planning Overview



A quick overview of the OLA and OCULA strategic planning process over the past year:

The OLA Board decided that the overall mission, vision, and four strategic goals (on the right hand side of the slide) were still relevant and appropriate, and that we would keep them for the next iteration of the strategic plan. The specific activities and initiatives related to each of those four areas would, however, need to be updated.

OLA hired consultants Dysart & Jones to gather information from members and non-members that would inform the development of the activities and initiatives. They conducted town hall meetings, online surveys, gathered information via social media, and researched current trends. With input from the OLA Board and members, the consultants developed seven personas representing OLA members and potential member communities. These personas describe key concerns, motivations, habits, etc. of OLA's member community, and can be used when deciding how to move forward with the four strategic goals and initiatives.

OCULA's strategic planning uses the same vision, mission and strategic goals as the OLA strategic plan, but we plan our own initiatives and activities within each of the four areas represented by the strategic goals. Because our divisional strategic planning uses the same overall structure as the OLA strategic plan, it is easy for us to see how our activities fit into OLA's goals and activities, and it also helps us see where we, as a division, have the most to contribute (i.e. which of the four areas has the most activities for OCULA). Similarly, at your academic library, it is important to be clear about how your strategic plan's initiatives relate to the larger plan of the university.

Aligning with OLA's Strategic Goals

Growing Career Paths

Transforming Ideas Into Solutions

Collaborating to Extend Libraries' Strategic Voice

Strengthening the Organization

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Again, aligning our initiatives with OLA's four strategic goals helps us determine how our activities support the larger association, and if we come up with a new idea for OCULA, if it doesn't fit within one of these larger goals, that's a sign for us to question whether we really should take it on.

In plain language, these four goals are the following:

- Growing Career Paths = professional development and networking opportunities
- Collaborating to Extend Libraries' Strategic Voice = advocacy, particularly working with other divisions or organizations for advocacy
- Transforming Ideas Into Solutions = coming up with innovative new ideas for OLA to implement
- Strengthening the Organization = ensuring that OLA has the member base and money to do what we want to do

The next slide will present some examples of activities that OCULA is considering for each of these four areas. A more detailed list is included on the accompanying handout – if anyone has additional ideas, please share them with us!

Aligning with OLA's Strategic Goals

- **Continue New Librarian Residency Program**
- **Collaborate with OLA Mentoring Committee**
- **Continue to prepare and deliver Information Briefs**

- **Support changes to OLA Super Conference (e.g., TEDLibraries)**

- **Identify one non-library organization to partner with**
- **Create an OCULA Council portfolio for advocacy**

- **Develop a promotions plan with an aim to increase membership**
- **Create volunteer database**
- **Explore new relationships with non-traditional library suppliers**

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For the rest of the session, we are going to focus just on Growing Career Paths, Collaborating to Extend Libraries' Strategic Voice, and Strengthening the Organization (fuller descriptions are on your handout). For the area of Transforming Ideas into Solutions, OLA's efforts are in large part focused around changes to the OLA Super Conference; OCULA will support these initiatives but it isn't a primary focus for our division.

On the next few slides, we'll go through the four strategic planning "guiding questions" to present some things to consider when beginning a strategic plan and an example of how OCULA Council has started to use the questions. Then we're going to turn it over to you to work through these questions and help OCULA council identify priorities and activities that support OLA's strategic goals.

Strategic Planning, OCUA Style

What are we going to do?

Are you **aligned** with institutional goals?

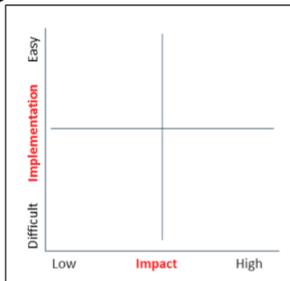
How will we make this happen?

Which initiatives generate the most **ROI**?

How will we know it was good?

Who are your **stakeholders**?
Are you meeting their expectations?

How will we brag about it?



Creating the personas

>Add a picture

CARRIE NEWBY
"I've still got a lot to learn about campus and being in college, but I do know the library is the place to be around people. That's how I like to study, even if I'm working by myself!"



WHAT YOUR SCHOOL WOULD LIKE
I'm taking ENG 101, COMM 101, a foreign course, and two PFM courses. For almost every course I have to write papers. I also have to do a group project for COMM 101, that's Public Speaking, and also for one of my PFM courses. My biggest class is really memorizing information and being busy and not having a lot of extra work. I also have internships and that starts in most of my courses. I have to do a lot of reading for biology and my PFM courses.

WHERE DO YOU STUDY?
Since I'm in the College of Business I'm over on Centennial Campus every week. I set up my schedule so I'm there on Tuesday and Thursday. Otherwise, all my courses are on Main Campus. It ends up being a lot of traveling on the weekend!

Between classes on Centennial I usually meet up with my friend and we study and hang out together at the Port City between classes on Main Campus. She likes to study in her library. Since we're taking different courses, we don't work on the same stuff, but I like being with them. Or if a friend isn't here, I still like to be at the Port City just because I like to be near people. When I need to work on a computer, I go to the North Library and use one of the computers there. I might work on an assignment that needs to be submitted through Moodle. I have a laptop, but I really bring it to campus because it's just too heavy. I heard about the Open House from one of my classmates. Since I'm over on Main Campus a lot, I really like to go to the North Library. I first saw the library on a campus tour before I applied to OCUA. I thought it was so cool! The North Library is the big one and has the best furniture with all the computers and green and purple furniture. Sometimes it's kind of crowded but I can usually get a computer and I like that there are so many people around. There's a ton of it! I don't use my laptop anymore. Since I'm over on campus, I like to eat.

ABOUT ME

- 28 years old
- Freshman, Fashion & Textiles Management
- Lives in West Village with two roommates
- Main Library will be a great place for studying near other people and getting help for my research papers.

MY NEEDS

- Attend a workshop with a librarian for my PFM 105 course
- Get research and technical help
- Somewhere to go between classes where I can be near others
- Group study rooms
- Lending the ropes of how things work on campus and in the library

WHAT'S IN MY BAG

- Textbooks

There are many models and terminology associated with strategic planning – goals, initiatives, objectives, measures, key milestones, etc. But for the purpose of this session we're going to frame our discussions about strategic planning around these four questions. We want you keep these questions and strategies in mind for the hands-on part of this session.

What are we going to do?

The first step in the strategic planning process involves deeply understanding the strategic goals and values of your library or institution and then brainstorming initiatives that would help support these goals.

Ask yourself, who are your primary and secondary stakeholders and what are their needs? Some simple ways to learn about your stakeholders might be to:

- conduct a SWOT analysis or environmental scan of your library or organization.
- fill out an empathy map to better understand your users needs, motivations and desires beyond their professional careers. How do they think and feel? What do they hear from their colleagues, friends?
- or, similar to OLA's process, you can gather feedback from your stakeholders through town halls and online surveys and develop personas. Personas help you understand who your current and potential members are, and gives you a framework to help you decide if a new initiative will support any number of your stakeholders needs.

During this stage you will also need to think about your current resources and what you have to work with. As a not-for-profit association with limited resources, we need to identify both short and long-term goals that will generate the most ROI with little resources.

(chart adapted from Killer QuickWin: Kill a Stupid Rule activity) <http://www.youtube.com/watch?>

Strategic Planning, OCULA Style

What are we going to do?

How will we make this happen?

How will we know it was good?

How will we brag about it?

Initial buy-in and planning phase



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This is an important phase in the planning process – there are a lot of practical things to consider as well as getting buy-in from your key stakeholders because without it your initiatives might be nothing more than a dream.

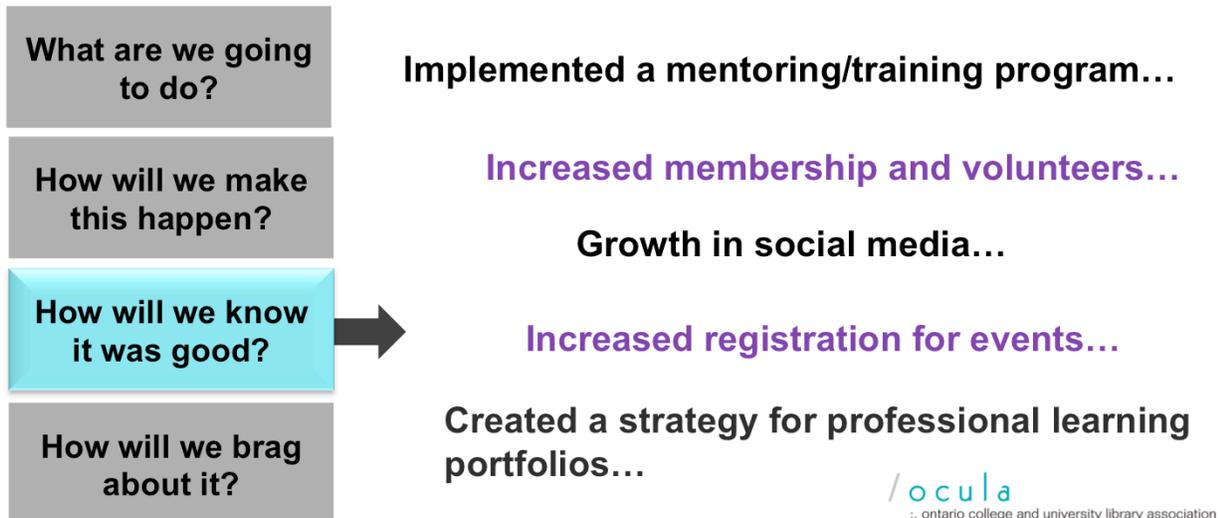
First, you need to talk to people to learn what is important to them and what it will take for them to support you. This will involve being enthusiastic, political & engaging others. You will also want to refer back to your personas, empathy maps or any other tools that you used in step one! You may also need to bargain and negotiate with key stakeholders to get them to support your initiative (something that many librarians tend to shy away from).

Second, we recommend you create a simple message to sell them on your idea and deliver it often. If you want to learn how to get people to buy into your idea, have a look at the videos posted on Kickstarter (for example, <https://www.kickstarter.com/projects/741186545/a-shirt-that-cleans-itself?ref=discovery>). These people are amazing at identifying the needs and desires of their target markets and convincing them to fund their initiatives.

Another effective tool is to create a Message Map which will allow you to focus your initiative and pitch it to your key stakeholders in 15 seconds. The principles of a message map are similar to an “elevator speech” or “pitch”: first, create a twitter friendly headline (140 characters or less) and then give 3 supporting points that you want people to remember. The example in this video is about the company Lush; the three takeaways are that they are fresh, environmentally friendly (no packaging), support ethical campaigns (for example, <http://youtu.be/phyU2BThK4Q?t=2m16s>)

In addition to getting buy-in, you will also have to think of all the little things you need to do to make this initiative happen. This might include soliciting funding, writing grants or proposals, putting together a committee, networking with external partners, or writing project charters.

Strategic Planning, OCULA Style



How will we know it was good?

Once you've decided on what initiatives to do and how you are going to accomplish them, you will need to identify ways to measure whether or not the activities were successful.

Think about your desired outcomes. What do you as an individual, library and organization hope to accomplish? How will you know if you've met your goals? At this stage, you should be able to say that the initiative you've chosen supports the mission, values and goals of your organization and how. Common ways to measure success may be to look at it in terms of... increasing..., implementing or creating something...

Even if your initiative is not successful, identifying why it wasn't successful can help in future strategic planning discussions.

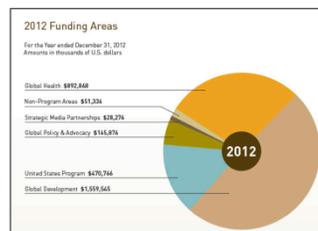
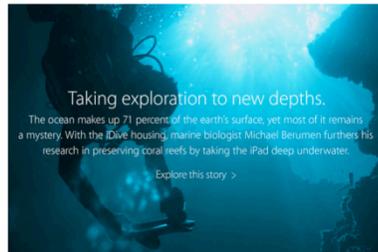
Strategic Planning, OCULA Style

What are we going to do?

How will we make this happen?

How will we know it was good?

How will we brag about it?



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Once you've implemented your initiative and assessed whether it was worthwhile or not (which hopefully it was) you're going to want to brag about it. This is something that librarians are notoriously bad at but that's why we suggest that you look at examples from other companies that brag about their accomplishments well. Some examples we've included here are from Apple, Bill Gates Foundation, and Edmonton Public Library.

We will be going into these in more detail later but some reasons why you would want to brag about your accomplishments include:

- Getting continued support and buy-in for the project. To do this you want to:
 - Show how the initiative supported your department or library as well as the wider organization
 - Tell key stakeholders how you may have increased members, revenue, and partnerships and how this helps the organization and your members. For example, more members means more revenue to grow professional development programs.
- And of course, it never hurts to get recognition for your accomplishments. All of us are working towards some personal goal – perhaps it's advancing in an organization, getting tenure, or presenting at conferences. Whatever it may be, develop your message map and pitch it often!

OCULA Council's Ideas for Review

OCULA Strategic Planning ☆ ■

File Edit View Insert Format Data Tools Help Last edit was seconds ago

OLA Division: OCULA	
Strategic Initiative:	Ideas for review
Growing Career Paths	Identify appropriate and relevant SC sessions to be offered as EI sessions Promote development of new EI sessions as a means for people to contribute to the profession Continue New Librarian Residency Program Fundraise for New Librarian Residency Program Fund Host the OCULA spring conference (professional development and networking) Host the OCULA spring dinner (networking) Host the OCULA Fall event and dinner (PD and networking) Collaborate with the OLA Mentoring Committee Continue to prepare and deliver information briefs Host a practicum student from an Ontario MLIS or library tech program Promote practicum opportunities among potential hosts (practicum, job shadowing) Contribute to the OLA initiative to create a grants application database with FAQs and templates
Collaborating to Extend Libraries Strategic Voice	Continue conversations with CAPAL, WNY/O, or other associations about potential collaborations Contribute to the OLA initiative to prepare briefs for Ontario Ministry of Training, Colleges, and Universities; in doing so, collaborate with associations such as CAPAL, CLA, CAUT, OCUFA Identify one non-library organization to partner with. Collaborate with OLA Advocacy Committee Create an OCULA Council portfolio for advocacy
Transforming Ideas Into Solutions	Support changes to OLA Super Conference; e.g. TEDLibraries Work with OLA where appropriate
Strengthening the Organization	Develop a deeper understanding of our membership (ideas: work with Ambassadors to gather information; consider conducting a survey of members and non-members)

These are some of the initiatives OCULA Council is considering for the 2014-18 strategic plan. In just a few minutes you will have an opportunity to learn about these initiatives more closely.

OCULA Council's Strategic Planning Example

Growing Career Paths

Collaborating to Extend Libraries Strategic Voice

Strengthening the Organization

Transforming Ideas Into Solutions

What are we going to do?

- Host a practicum student from an Ontario Library Sciences or Library Technician Program

How will we make this happen?

- Write a proposal for the practicum outlining learning objectives, project, council lead
- Promote practicum opportunity to appropriate schools

How will we know it was good?

- OCULA has a successful applicant who carries out their practicum
- OCULA received positive feedback and rating from post-practicum interview with student

How will we brag about it?

- Publish a piece about the student's learning experience in Inside OCULA



Now let's look at Growing Career Paths to see how we can apply the points we just discussed to create a plan for one of the strategic initiatives OCULA is considering to implement this year.

So, what are we going to do?

- To support OLA in expanding members professional development and career opportunities, OCULA will host a practicum student from an Ontario Library Sciences or Library Technician Program

How will we accomplish this goal? To make this happen, we might:

- Write and submit a proposal for the practicum, outlining the learning objectives and projects for the practicum and identify a council lead to oversee the student
- Reach out and develop relationships with faculty who teach practicum courses at our targeted schools

How will we know if it was good?

- Had a successful applicant who carried out their practicum
- Positive feedback from student and council lead

How will we brag about it?

- Get the student to write about their learning experience and publish in InsideOCULA
- Overall, close the strategic planning loop by telling key stakeholders how the practicum student helped OCULA complete a project that otherwise could not be done by Council and how it supported OLA by offering our members practical professional development and career advancement opportunities.

OCULA Strategic Planning - Your Turn

Growing Career Paths

Collaborating to Extend
Libraries Strategic Voice

Strengthening the
Organization

Transforming Ideas Into
Solutions

1. What are we going to do?

- Your group choose an activity - what should be OCULA's priority for the next year?

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The three strategic goals highlighted in blue will be the areas that groups will work explore. Each group will work with one area.

Activity: As a group, consider the activities for your area listed on the handout, and think about what you think OCULA's priority should be for this year. Choose one initiative you want to work on and write it at the top of the flip-chart paper

Consider choosing an initiative that you think will help strengthen the OCULA division while at the same time support OLA's strategic goals.

OCULA Strategic Planning - Your Turn

Growing Career Paths

Collaborating to Extend
Libraries Strategic Voice

Strengthening the
Organization

Transforming Ideas Into
Solutions

2. How will we make this happen?

- What are some specific things that OCULA can do?

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Now that you've chosen an initiative, you need to figure out how you are going to make it happen

Activity: take 5 minutes to brainstorm as many ideas as you can come up with. As you come up with an idea, write it on a sticky note, say it aloud and post it on the flip chart paper.

Remember, during this phase you need to think about how you will get buy-in from key stakeholders, what matters to our members/non-members

OCULA Strategic Planning - Your Turn

Growing Career Paths

Collaborating to Extend
Libraries Strategic Voice

Strengthening the
Organization

Transforming Ideas Into
Solutions

3. How will we know it was good?

- What should OCULA aim to achieve in this area?

Activity: Thinking about the initiative you chose, write down 1-3 examples of how to determine/measure their activities. If you get stuck, use the Brainstorming Cards on your tables.

OCULA Strategic Planning - Your Turn

Growing Career Paths

Collaborating to Extend
Libraries Strategic Voice

Strengthening the
Organization

Transforming Ideas Into
Solutions

4. How will we brag about it?

- How can we describe our achievements?
- How can we make a case for continuing to do this or allocating more resources to it?

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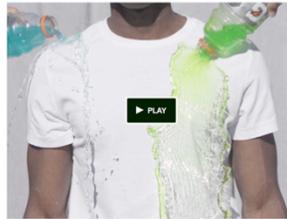
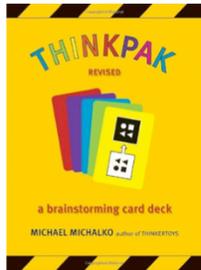
Activity: As a group, develop a 'pitch' to brag about the success of your initiative. (For this activity, pretend that you have been successful in carrying out the initiative.) Present your 'pitch' to the larger group, and before you start, identify who the audience is for your pitch (e.g., the OLA Board, OCULA members, etc.)

A strategic plan doesn't just help you to plan which activities and initiatives you will take on, it also helps you talk about your progress and achievements related to those activities.

Wrap-Up and Questions

- What we did
- Reflect & share: How can you apply this to your institution?

List of Resources



How to Pitch Anything in 15 Seconds [video]

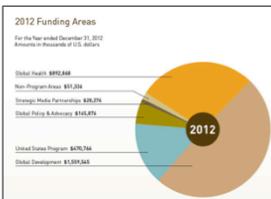
151 comments, 70 called-out

If you can't tell me what you do in 15 seconds, I'm not buying, I'm not investing, and I'm not interested.

Few technologies are as complicated to explain as 4G LTE. Last year I worked with a group of leaders for the division of a global, publicly traded company who were responsible for pitching the technology to potential customers.



Carminne demonstrates a message map



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Brainstorming tools:

Gray, Dave, Sunni Brown, and James Macanuff. (2010). *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*. Sebastopol, CA: O'Reilly Media.
 Michalko, Michael. (2006). *Thinkpak: A Brainstorming Card Deck*. Berkeley, CA: Ten Speed Press.

Needs Assessment tool:

Learning Space Toolkit, <http://learningspacetoolkit.org/needs-assessment/>

“Getting Buy-In” examples:

Silic: A Shirt that Cleans Itself, <https://www.kickstarter.com/projects/741186545/a-shirt-that-cleans-itself?ref=discovery>
 How to Pitch Anything in 15 Seconds, <http://youtu.be/phyU2BThK4Q?t=2m16s>
 Kickstarter School: Making Your Video, http://www.kickstarter.com/help/school#making_your_video

“Bragging About It” examples:

Apple, <http://www.apple.com/your-verse/#video-your-verse>
 Gates Foundation Annual Report 2012, http://www.gatesfoundation.org/~media/GFO/Documents/Annual%20Reports/2012_Gates_Foundation_Annual_Report.pdf
 Edmonton Public Library Annual Report 2012, <http://www.epl.ca/sites/default/files/pdf/annual-reports/eplannual2012.pdf>