Winter 2001

Fifteen Months in the Planning Trenches: Strategically Positioning the Research Library for a New Century

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Strategically Positioning the Research Library for a New Century

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P lanning is something we do frequently, often without thinking about it, even if it only means putting together a "to do" list of daily activities. We plan workflow for departments and organize projects to reduce backlogs. We plan meetings, staff development activities, and even parties. But this sort of planning is not strategic. Strategic planning is more future oriented and involves quantifying and objectifying the library's goals and mission, its values, and its vision for the future. It is a careful process that evaluates the environment and emphasizes deployment of resources to achieve meaningful results. But it is more than just a budget document. When done correctly, the strategic planning process produces understanding and a common purpose throughout the organization.

Strategic planning in libraries has generally been organized and overseen by senior management. More often than not it comes as a response to some sort of major change imposed from within or from outside the organization. A reactive approach to planning comes as a result of budget cuts or mandates for staff reorganization. Unfortunately, major change often forces strategic planning. Still, reactive planning often is successful in spite of the conditions under which it is imposed. Proactive planning, on the other hand, may be less common but is equally beneficial and has several advantages. Not having to deal with major budget cuts or other changes means the planning process can focus on the library's mission, core values, and direction. A proactive approach to strategic planning allows more time for the organization to grapple with a vision of the future, to benchmark other organizations for quality of service, and to seek feedback from all levels of staff.

Why Plan Strategically?

Planning is an integral function of any university library. It provides a tangible outline toward reaching the goals of the organization and includes markers for measuring progress along the way. Strategic planning has been used by libraries to focus on the unique roles they play and values they bring to their community of users as well as a way to

involve staff at all levels in the planning process. It produces understanding and common purpose throughout the organization, guides resource allocation decisions, and acknowledges the modern reality of growth by substitution. Strategic planning is a process in which the building of objectives is a key cooperative effort, where all staff are engaged so that consensus and commitment to the plan become corollaries to its implementation. At best, the process produces a plan, which is as much a living, breathing entity as those who shaped it.

A strategic plan contains several parts that relate in how they describe and proscribe for the organization.

- **Mission Statement.** A comprehensive statement of the organization's purpose that, for research libraries, often relates to the mission of the institution the library serves.
- **Values.** Qualities that the organization strives to exemplify in its daily work as well as guiding principles or beliefs to which everyone in the organization subscribes.
- **Vision Statement.** Combined with mission and values, the organization's vision statement identifies the library's unique qualities and presents a broad statement describing where the organization wants to go.
- **Environmental Assessment.** Surveys key developments within and outside the library profession and the local community as well as larger social, technological, economic, and political trends.
- **Goals and Objectives.** Specific targets for accomplishment that derive from the above statements. This is the section that takes the most time for many organizations to fully develop.
- **Action Items.** Detailed work plans to accomplish the goals already stated. This section drives many resource allocation decisions, and has the most potential to bring change to the ways work is accomplished.
- **Review and Update.** Regular monitoring of the strategic plan to ensure progress toward goals is being made.

Getting Started

The library at Brown University began to think about proactive strategic planning in 1997. Beginning with a study of the library's present management and staffing patterns, a new expanded leadership model brought middle and upper management together in a single management group. In addition, a new library organization and staff development officer position was created and filled. The library study outlined a set of staff initiatives dubbed MODEL (Managing Organizational Development through Effective Leadership), which brought a new emphasis on decision making and responsibility to all staffing levels. Working with the facilitation skills of Maureen Sullivan, ARL/OLMS consultant, and the library organization and staff development officer, the library began a comprehensive planning initiative in early 1998.

One of the key initiatives in MODEL was to push decision making in the library down to the lowest possible levels and encourage collaborative projects. In discussions about how to proceed with the strategic planning process, a decision was made with the full support of the university librarian to appoint a steering committee made up of interested, motivated, and knowledgeable staff members from both the professional and paraprofessional ranks. Although all staff had the opportunity to volunteer for service on the steering committee, its final composition included two department heads, three professional librarians, one paraprofessional manager, and two paraprofessional staff members. No senior administrators served on the steering committee, nor was the university librarian a member. This does not mean that administrators were not part of the process, but rather that they served as support personnel providing information, guidance, and direction when asked. Associate university librarians contributed to the plan by writing the environmental assessment section of the document and serving on task forces charged with investigating strategic directions.

The Brown Library was, fortunately, in a position to do proactive planning. There were no pending budget cuts and no mandate to reorganize. But while there was no crisis in a traditional sense, the library was facing the same mounting pressures as other research libraries: rapidly changing technology, increased user expectations and demands, aging paper collections, little funding for new

> Combined with mission and values, the organization's vision statement identifies the library's unique qualities and presents a broad statement describing where the organization wants to go.

electronic databases, and stagnant budgets. These pressures became forces for change within the planning process and were effective in focusing early efforts at thinking strategically about the library's future.

Selected staff and the library's leadership group convened in a retreat in February 1998. Among the attendees were the university librarian, all associate university librarians, department heads, branch librarians, and key administrative staff as well as eighteen additional staff members representing a broad cross-section of the library. Through this active learning experience, the thirty-eight participants learned about strategic planning as they started to do it. Six strategic directions emerged from discussions at the retreat, as did a number of ideas about future trends in library service and use. These six directions are described later.

Strategic Planning Steering Committee

Following the retreat, the university librarian issued a call to all library staff for nominations to serve on a Strategic Planning Steering Committee (SPSC). Eight staff members, again with a diverse range of membership from across the library, were appointed in March 1998. Those selected to serve on SPSC made a commitment to fully engage themselves in the process, focus on library users, think strategically, and maintain open lines of communication with library staff. As previously mentioned, the members of the steering committee came from a variety of positions and units throughout the library. Serving as facilitator for SPSC was the organizational and staff development officer, who brought a wealth of experience in facilitation to the group. SPSC developed its own charge, which states, in part:

> With the broadest possible involvement of library staff and consideration of the needs of the library's users, the Strategic Planning Steering Committee is charged to determine the library's strategic directions and goals for the year 2000 and beyond. In continuous dialogue with other staff, the committee shall produce an action plan for the fiscal year 2000, based on these strategic directions. It is also expected that the work of the committee shall provide a foundation and structure for future planning.

SPSC members began the planning process with varying ideas about what strategic planning is and how it should be done. There also were different levels of understanding about how the work would be accomplished. But SPSC was committed to the process of planning. Understanding the desire to involve as many staff members as possible, SPSC worked to set up ways of communicating progress to and getting feedback from staff. This information sharing was seen as vital in producing understanding of the goals and linking the plan to a common purpose among members of the library. SPSC also had to determine how to organize itself. Rather than appoint a chair, the group chose to self-manage. Throughout its fifteen-month lifespan, the group worked effectively as a team, shared leadership, and rotated roles and responsibilities while drawing upon the unique skills and abilities of each member. The group met regularly each week, accelerating meeting times toward the end of the process to complete their work.

Six Strategic Directions

Building upon the work of the February retreat, SPSC confirmed the six strategic directions to be pursued in the planning process. In order to draw upon the substantial skills and expertise of a large number of staff, a task force of six to eight members was formed for each strategic direction.

SPSC coordinated selection of task force members. All library staff were invited to self-nominate by sending a statement expressing interest and answering these questions:

- Why would you like to serve on this task force?
- What skills, knowledge, or competencies would you bring?
- What skills would you like to use that you have not used before?
- How would you rate your ability to work well with others and under pressure to meet deadlines?

Initial response to the search was lower than expected. Several reasons could account for this, but certainly the offer to serve was a major change from the way task force members had formerly been selected in the organization.

SPSC [Strategic Planning Steering Committee] also had to determine how to organize itself. Rather than appoint a chair, the group chose to self-manage.

Prior to strategic planning, task forces would generally be appointed from the library director with input from senior administrators. There also was a timing issue since the offer to serve on a strategic planning task force coincided with the end of the university school year and the beginning of summer vacation. In addition, there may have been some confusion about how to answer questions in the interest statement. At any rate, SPSC needed to draft a few individuals to fill out the task forces. Names of the draftees were carefully considered and not all those asked volunteered, but in the end full task force membership was completed.

Early in the process of discussing the six strategic directions, SPSC found that three were easily identified as "drivers." That is, they represented core directions that drive the library's work. The three driver task forces would concentrate their work in these strategic directions. It was decided that since these drivers would influence the other three strategic directions, dubbed "supporters," each group of three task forces would work during two staggered phases of the planning process. The driver strategic directions included:

- **Service to Users.** How can the library be more user centered? How can the quality of current services be improved? What services not currently offered should we provide to better serve our users?
- **Collections.** The idea of collections lies at the heart of the library's mission and has expanded to include access to distant information as well as the gathering of resources in one place. The role of collections impacts on many traditional library functions, including collection development, acquisitions, cataloging, preservation, special collections, circulation, interlibrary loan, and reference.
- **Educational Role.** Investigate how the library provides support for teaching and learning, and how the library will continue to actively develop this role. Examine how the library can position its staff to begin partnering with faculty in the classroom, with an awareness that barriers to such an arrangement must be overcome. Synthesize a framework

for the library to move from its traditional role of information organization and retrieval to become educational consultants assisting students in gaining critical evaluation skills to decipher a myriad of information sources.

The driver task forces were part of the first phase of strategic planning work that took place from June through October 1998. Three other strategic directions were identified as supporters that, as implied by their name, provided support and assisted the drivers. The supporter strategic directions included:

- **Technology.** The world of information technology changes constantly, rapidly, and often unpredictably. How can the library meet the need to constantly upgrade the technological infrastructure? How can the library best meet the technological needs of users (on- and off-site) and staff? What "state of the art" should the library aim for users and staff? What can be done to better integrate electronic and print collections? How can the library enhance partnerships with other campus information providers?
- **Staff Development.** To ensure adequate staff expertise, we must investigate individual and organizational learning models; develop skills, knowledge, and competencies for the twenty-first-century library; and encourage flexibility, cooperation, risk taking, and innovation among staff members.
- **Facilities and Space.** Examine current library facilities (including off-site storage) to determine if space is being utilized as well as it can be. Is the library making the best use of the space that we have? Are there changes that could be made to improve current facilities? Is there additional space that might be utilized in the future? The library has to be an inviting, comfortable, and pleasant place for users and staff alike.

The three supporter task forces used information gained and forwarded from driver task forces for their work during the second strategic planning phase spanning September 1998 through February 1999.

> How can the library be more user centered? How can the quality of current services be improved? What services not currently offered should we provide to better serve our users?

The Role of the Steering Committee Members

Lengthy discussions were held with SPSC as to the committee members' roles in task force work. Some thought the steering committee should serve as members, while others felt that it was more important for SPSC to oversee the process of task force work. From these discussions a plan evolved that captured the best of both these ideas.

For each task force, two members of SPSC were designated as facilitating liaisons (FL). The role of the FL was to facilitate accomplishment of each task force's work and act as a two-way communications link between the task force and SPSC. The FL role was essentially supportive, based on the liaisons' experience to date with the strategic planning process and their membership on the committee responsible for integrating the contributions of the individual task forces into a system-wide plan. FLs would not assist in the writing of task force final reports and were careful not to influence content discussions, but rather they would remain focused on process. Work of facilitating liaisons included:

- attending meetings of the task forces, in rotation or together, as the occasion warranted;
- helping the task forces maintain focus and direction related to the overall strategic planning effort;
- contributing background information from earlier outcomes of the MODEL process and from strategic planning retreat documents and from readings and other sources of interest, both at the outset and on an ongoing basis;
- acting as an open channel for communication/feedback between the task forces and SPSC;
- coordinating the work of the task forces via SPSC to avoid duplication of effort as well as to communicate useful findings or suggestions from one task force to another; and
- ensuring that draft and final task force reports were delivered on time.

The FL arrangement worked well in managing communication among and between task forces. However, in retrospect it is clear that FLs did a lot of "liaisoning" and not enough "facilitating." This should not be seen as a reflection on the individual FLs or on the concept of facilitating liaisons. Members of SPSC who served as FLs brought differing levels of facilitating skills to the process. Some had more experience in this area than others did, and some were more comfortable in this role than others. This disparity, coupled with a reluctance to be overly intrusive into task force work, meant that task forces at times did not receive direction or maintain the sort of focus required to easily complete their objectives. This had a positive result in that task force members responded by finding their own way and creating a process that worked for them. SPSC members also learned a lot through the process and would no doubt be much better FLs in the future. Still, the outcome was that busy and time-sensitive task forces had to spend additional amounts of time working in areas of process.

Another difficulty was that at times' it was difficult for FLs to remain neutral as far as content in task force meetings. Sometimes this simply meant switching "hats" from a FL to staff member with responsibility for part of the work in question. At other times it meant that some of the focus on process was lost along with concomitant momentum to complete the process. Serving as FL was not always easy when possible changes to one's work or work area were being discussed.

Overall, the notion of FLs was a good one and contributed to the task forces being able to complete their work within a six-month period. Training in facilitation skills would be a requirement should this process be chosen in future planning efforts. A greater role in assisting the task forces with maintaining focus on objectives and process also would be helpful. One positive outcome of serving as FLs rather than full task force members was that SPSC members maintained enough time to work on the other important parts of the strategic plan during the task force phase. While it was understood that task force recommendations would form a core of action items for the final plan, the environmental scan, mission statement, vision statement, guiding principles, and other parts of the plan would have to be fleshed out and endorsed by library staff.

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Communication and Feedback

Almost immediately upon its inception, SPSC began creating opportunities for communicating with staff about the plan. Six open-forum sessions were held throughout the planning period. The forums were held at different times and in different locations to allow as many staff as possible to attend. Content of the forums varied, but always included updates, progress reports, and opportunities to provide feedback. A strategic planning Web site was developed within the library's Intranet and featured key draft documents as they were compiled. In addition, an electronic discussion list, called LIBSPK, included seventy members from the staff who discussed topics ranging from technology to outsourcing, from change management to the role of middle managers.

Upon distribution of the driver task force reports, nine feedback sessions moderated, recorded, and observed by members of SPSC were held for staff and a comment form was made available in order to obtain as much input as possible on the recommendations. Similarly, a feedback session and comment form were used following the distribution of the supporter task force reports.

SPSC sought guidance from library administrators and managers at several critical points in its work. As key stakeholders and potential implementers of the plan, their understanding and input was crucial to the success of the process. Soon after SPSC was constituted, they met with the university librarian to review their proposed charge and to clarify their responsibility and authority. A second session with SPSC and the university librarian was held upon publication of the driver task force reports. In addition, dialogue sessions with key decision makers about developing ideas and recommendations were held at critical points in the planning process. From time to time individual members of SPSC sought and received helpful administrative guidance and support, which facilitated the strategic planning work.

In an effort to take a fast-track approach to the strategic planning effort, solicitation of input external to the library and its own staff was somewhat limited. Nevertheless, members of the task forces and SPSC were conscious to reflect their many experiences with library users and perceived user needs in the plan. Additionally, in several instances, the best practices of other academic research libraries were investigated. Some of these were highlighted in individual task force reports and evolved into action items in the final planning document. Site visits, professional literature, organization charts, and other planning documents were just some of the tools used to identify best practices. Unfortunately, time constraints in the planning process limited this activity. But identifying best practices and using them as measures against the library's own practices remains an important action item for the future.

As the library's ongoing future planning progresses, particularly in instances where the planning becomes more tactical than strategic in nature, it will be desirable to proactively solicit more external input into the library's decision making. One step towards this end has been the efforts of the Library User Needs Team, which has been working concurrently with this strategic planning effort to conduct user surveys.

Mapping the Parts of the Strategic Plan

Tapping into the expertise of Brown Library senior administrators, the three associate university librarians were asked to work on the environmental assessment to be used in the planning process. This assessment surveyed key developments within and outside the library profession and the Brown University community as well as larger social, technological, economic, and political trends affecting delivery of library services. Given a more lengthy planning process, this work might have been performed by SPSC. However, the results achieved through delegation to experts were useful and informed the final planning document.

SPSC designed a second staff retreat opportunity as a way to further involve staff in the strategic planning process. In July 1998 twenty-eight staff participants engaged in an active learning experience and a series of exercises on environmental assessment, vision, strategic directions, and guiding principles. None of

> A strategic planning Web site was developed within the library's Intranet and featured key draft documents as they were compiled.

these participants had been involved in previous planning sessions and their input was wide, varied, and useful. SPSC utilized the work generated from both the February and the July retreats to refine the library's mission statement and add a vision statement designed to provide an image of excellence in library service that matched the excellence of Brown University.

In addition, a statement of guiding principles was developed that captures the library's core beliefs and informs its service ethic. Often referred in the literature as a values statement, the notion of guiding principles was chosen at Brown because it best the imparts of notion of shared organizational service principles. Rather than values, which often are individual in nature, Brown's statement of guiding principles includes embracing ideals, committing to service, engaging our community of users, and accepting the challenge of technology in all its forms.

Rather than serve as static documents, the mission, vision, and guiding principles statements were interactively prepared over the full life of the planning process as various other components of the strategic plan were developed. At each stage, as drafts of these documents were completed they were posted on the library's internal Web server for comment and feedback from staff. This input was critical in achieving shared understanding and the sense of common purpose among staff members, and was an important part of an interactive strategic planning process.

Although each task force prepared its own set of goals and action items, the work of SPSC was to synthesize, integrate, and expand these into a workable strategic plan for the library. This was the most difficult and time-consuming part of the entire planning process. SPSC began meeting twice weekly for three to four hours at a time to develop the final plan. Part of the work was a winnowing out from the task force reports of what could be accomplished and part was identifying "quick hits," or fairly easy changes to make, but the most difficult part was grouping disparate and sometimes conflicting recommendations for action into a larger cohesive plan. The process of discussing these recommendations was informed not only by the task force reports, but also by comments

received from staff through various channels; looks at other library practices; the statements of mission, vision, and guiding principles; and the expertise brought by each member of SPSC.

This approach led to the identification of four strategic themes that encompassed recommendations from all the task force reports. Those four themes involved:

- focusing collections;
- designing user services and delivering information resources;
- collaborating in learning; and
- preparing the library for the twenty-first century.

As a result of drawing out strategic themes, many of the recommendations appeared on first glance to be somewhat different from those made in the task force reports. Only upon closer reading did it become apparent that these recommendations had been merged into specific themes and that many were combined with others that were similar in terms of action specified.

A final consideration was how to format the planning document as a cohesive report. For each theme there is a brief outline of the library's recent past that provides historical context for its development. Sections under each theme were:

- forces for change, which discusses the often complex nature of change the library faces;
- our future, which provides a vision of where the library is headed; and
- steps toward the future, which addresses specific recommendations and action items.

Each theme also included a section outlining the quick hits. The final document was edited, formatted, printed, and bound for distribution to the entire library staff. It also was mounted on the library's internal Web site. Although months of feedback sessions, open forums, and e-mail announcements had kept staff appraised of planning progress, two final information sessions were scheduled. The first provided library staff the chance to give input on how they felt they could contribute to the plan. The second was a meeting with the library's new leadership group, which would be overseeing the implementation of the plan. This hand-off of

the plan to the leadership group signaled the end of SPSC's work

Reflecting on the Planning Process

Fifteen months spent in strategic planning is what it took for the Brown Library to complete the process. Artificial time limits set near the beginning of the process proved unrealistic and were, fortunately, discarded. If there is an unwritten law of this sort of proactive and inclusive planning, it is that everything one wants to do will take longer than expected.

Members of SPSC were individually excited about planning and ready to get on with the process, but it took some time to learn about each other and come together as a group. When upper management undertakes planning, the group members often are familiar with each other. But for this planning process at Brown there was a group of library staff who had not worked together; some barely knew the other members at all. It took several weeks for the group to begin to feel comfortable working together.

In the beginning SPSC members had to operate with only a certain level of understanding about what they were supposed to do. They read some texts on strategic planning, talked about it among themselves, and thought about it outside the group. But at the beginning, the approach was somewhat tentative because many of them weren't exactly sure what they were supposed to do, or, once they figured that out, how they were going to do it. To their credit, they continued to operate around these questions until the uncertainties worked themselves out with time.

SPSC found itself spending a lot of time coordinating the open-forum sessions for staff feedback. Planning each function took up what occasionally seemed to be inordinate amounts of meeting time. The forums and other feedback events were successful, but planning for them slowed progress in other areas.

Sometimes you can have too much communication. During the rollout of the driver task force reports, SPSC scheduled nine small group information sessions staggered over a period of two weeks and asked people to sign up for one of the times. It was felt that small

group sessions would provide opportunity for feedback that was sometimes lacking in the larger open forums. But turnout at the information sessions was weak. Some were canceled because no one signed up. It seems that the other communication methods were working well and small group sessions were not needed.

As mentioned previously, the role of facilitating liaison for SPSC members who worked with task forces was one that required more preparation. Not all members of SPSC had experience facilitating group process and while there was a great deal of on-the-job training, the work of the task forces may have been smoother with better facilitation.

The amount of time allotted for task force work was short. While three months to prepare a report on a strategic direction may seem like plenty of time, the fact the process was to be carried out over summer months and holiday breaks meant that the task forces sometimes met with many members missing. It also curtailed their ability to look beyond Brown at best practices. There were a couple of site visits, but most made do with professional literature searches and virtual visits to other institutions via the Web. In retrospect, six months for each task force to explore its strategic direction would not have been too much time.

The amount of time allotted for the strategic planning process also was too short. The original plan was to complete the process in ten months. That it took fifteen months of hard work provides an idea of how different parts of the process can take inordinate amounts of time. On the other hand, the library and the library world do not stand still during a planning process. It is important to understand that SPSC members continued to do their own jobs while also overseeing the planning process. After learning how to plan, the library staff will undoubtedly be able to do as good a job in less time during future planning periods.

No matter how well one tries to communicate, many staff members are mostly concerned with how any recommendation or action item will affect their jobs. It is very difficult to get everyone to think on a system-wide basis. There were a couple of instances where a recommendation for a specific change had been widely discussed without objec-

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tion, but when the recommendation appeared in print as part of the final plan, some staff started asking, "What about how that affects my work? Why are we doing this?" Keeping staff focused on the system-wide perspective was not always easy.

The implementation process is an important one. Many questions about recommendations of the plan were deferred to the implementers simply because SPSC ran out of time. For example, it would have been helpful to create a chart showing all the recommendations and action items, each including a time frame for implementation, who would be responsible, and how the work would be done. They were not able to provide such a chart for this plan. Fortunately, two members of SPSC will be part of the new leadership group that will oversee implementation of the plan. This should provide continuity between what was desired by SPSC and the library staff and how each recommendation will be implemented.

Steps Toward the Future

As previously mentioned, a new leadership group has been put in place that will guide implementation of the strategic plan. The Library Transitional Management Group (LTMG) will operate for a minimum of three years and focus on the action items and recommendations outlined in the strategic plan as well as coordinate other operational issues faced by the library during this period. Their work will be important as the library moves from strategic to more tactical planning. This is an important distinction. Strategic planning considers long-term activities, normally three to five years in the rapidly changing research library environment. Tactical planning is more immediate and is concerned with how to accomplish certain activities right now.

The specifics of implementing a strategic plan are tactical because they focus on specific actions that must be taken. For example, LTMG has already identified some of the quick hits as areas for immediate implementation. The assignment of responsibility for carrying out implementation and its follow up is tactical in that it achieves some specific end. In this example, the recommenda-

tion to have a cafe in the two main libraries resulted in a vendor setting up two food-and-drink carts in the lobby of each library. Implementation of any plan is almost as important as the planning itself. Brown's success with its strategic plan will be directly tied to the implementation process.

The planning process itself created a great deal of positive interest and energy on the part of library staff. The experience of including more than half of the staff in the planning process, as well as the high level of communication and feedback between staff and SPSC during the process, meant that by the beginning of implementation most staff understood or had bought in to the plan. This is a particularly important point because while LTMG will coordinate implementation, it will be library staff who are actually doing the work and making the changes for the plan's goals to be reached. Bringing staff on board, sharing information with them, and asking them for feedback and help during the planning process simplified the implementation process by allowing staff to become familiar with and develop support for the strategic plan. This was the experience with the strategic planning process at Brown University Library during 1998–99.

Strategic planning considers long-term activities, normally three to five years in the rapidly changing research library environment. Tactical planning is more immediate and is concerned with how to accomplish certain activities right now.

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THANKS

With the passing of our first National Institute—held November 30 – December 2, 2000, in Palm Springs, California—we at LAMA would like to express our gratitude to everyone who contributed to its success. The event would have been impossible without all those who attended—we thank all of you for coming. We are especially grateful for the participation of our speakers, whose work made the institute such a valuable experience.