Staff-Led Strategic Planning
with Katy Mathuews & Ryan Spellman
A Roadmap to Success
Ohio University Libraries
R1 University
Approximately 28,000 students
OhioLINK Founding Member
Association of Research Libraries Member
67 Library Staff

Learn more by visiting us at ohio.edu/library
Special Thanks to Our Colleagues

Kelly Broughton
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Hanna Schmillen
Seth Sisler
Tanner Smith
Nancy Story
Eileen Theodore-Shusta
Brandi Weaver
Carla Williams

...and many more!
Three-part Review on Key Considerations

- **Pre-Project Planning**
  - The Staff-Led Approach
  - Understanding Strategic Plans
  - Coordinating the Work

- **Creating the Plan**
  - Research and Data Analysis
  - Writing Your Strategic Plan

- **Implementing the Plan**
  - Assessing Initiatives
  - Communication Throughout and Beyond
Staff-Led Approach

Collaborative
Empowers staff
Creates connection
Cost effective
Time investment
Staying objective
Anatomy of a Strategic Plan

- Vision Statement
- Values Statement
- Mission Statement
- Goals & Initiatives
Coordinating the Work

Collaborative structures
Environmental scanning
Stakeholder research
Writing the plan
Assessing the plan
Communication strategies

Coordinating the Work

Collaborative structures
Environmental scanning
Stakeholder research
Writing the plan
Assessing the plan
Communication strategies

Research & Data Analysis

Environmental Scanning

Stakeholder Research
Writing the Plan

Group Data Synthesis
Unearthing Themes
Drafting as a Team
Communication Throughout & Beyond the Planning Process

Communicate about Communications
Be Strategic
Broaden Channels
Tailor Content for the Channel
Never Skimp on Accessibility
Gratitude
Creating, Implementing, and Assessing Initiatives

The Importance of Assessment

Measurable Goals are Key

<table>
<thead>
<tr>
<th>GOAL 7: Build a Robust Assessment Programme</th>
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<tbody>
<tr>
<td>OUTCOME 7.1: Establish and implement an output-based performance and measurement for all library staff - biannually</td>
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<tr>
<td>1. Establish a library-wide assessment plan aligned with strategic planning activities at the programme, faculty, and university level.</td>
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<td>2. Identify strategic and tactical metrics for use in library assessment activities.</td>
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<td>3. Implement mechanisms for routine access and dissemination of data useful in evidence-informed decision making at every level of library operation.</td>
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<td>4. Align library staff development to meet the requirements of dynamic library programmes and services in an academic environment.</td>
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<td>5. Increase collaboration with university administrative units like Quality Assurance.</td>
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<td>6. Conduct studies to understand, identify, and document</td>
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<tr>
<th>OUTCOME 7.2: Evidence-based staff evaluations</th>
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<td>1. 2 appraisals performed on all Library Staff - appraisals done on a biannually basis.</td>
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<td>2. Library Staff each develops a performance agreement as a basis for annual appraisal.</td>
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<td>3. Quarterly reports produced per campus library based on assessment tools - specifically staff performance.</td>
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<th>OUTCOME 7.3: Evidence-based and evaluating success</th>
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<tr>
<td>1. Circulation Policy developed and implemented</td>
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<td>2. Collection Management plan developed</td>
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<td>3. Staff job descriptions reviewed</td>
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Conclusion

Thank you!

Want to continue the discussion? Reach out to us!

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Overview of the Process that Inspired Us

<table>
<thead>
<tr>
<th>Month</th>
<th>SPCC Core Committee</th>
<th>Stakeholder Research</th>
<th>Environmental Scan</th>
<th>Themes / Initiatives</th>
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<tr>
<td>Apr</td>
<td>Planning &amp; Kickoff</td>
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<td>May</td>
<td>Form Core Cmte &amp; Sub Co-Chairs</td>
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<td>Jun</td>
<td>Provide platform for subcommittee co-chair support, coordination, and communication with Executive Cmte, all staff, and others</td>
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**Themes & Initiatives**
Subcommittee continues to direct an iterative drafting process, refining findings, themes, and potential initiatives into a final report and strategic plan.

**Report and strategic plan due to the Executive Committee by Dec 31st for review.**
Ohio University Libraries Strategic Plan

https://www.ohio.edu/library/about/strategic-plan