# Staff-Led Strategic Planning with Katy Mathuews & Ryan Spellman A Roadmap to Success









**R1** University



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## Special Thanks to Our Colleagues



Kelly Broughton John Canter **Judy Carey Nevin** George Cheripko Araba Dawson-Andoh Damon DeBorde Jeff Ferrier Jeff Fulk Janelle Hubble Janet Hulm Miriam Intrator Michele Jennings

Miriam Nelson Michael Pistrui **Carrie Preston Neil Romanosky Sherri Saines** 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

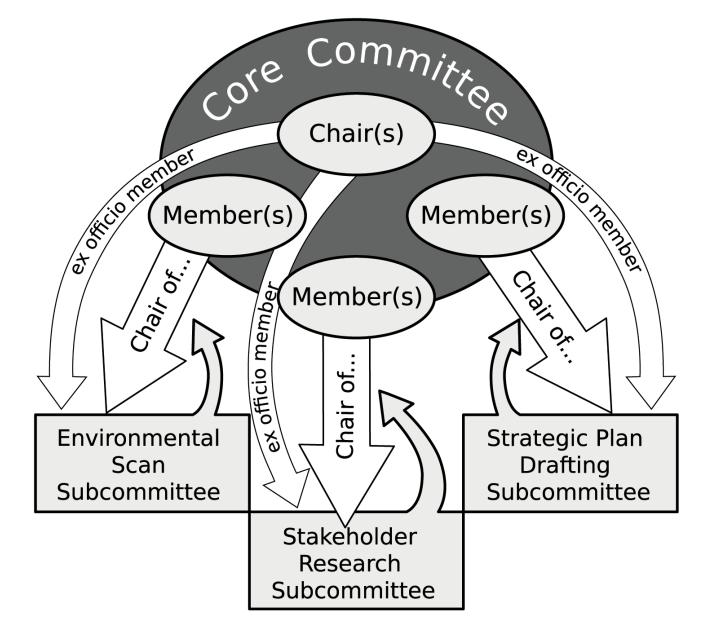
Environmental scanning

Stakeholder research

Writing the plan

Assessing the plan

Communication strategies



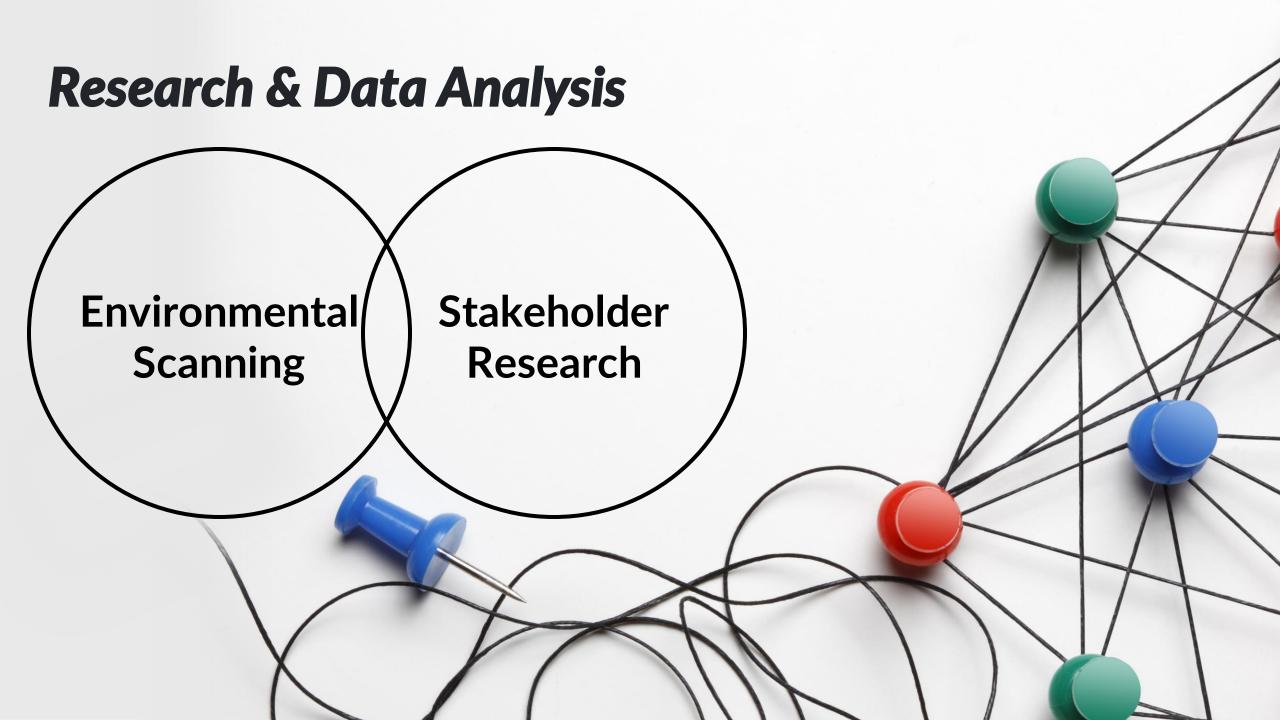
**Note.** Illustrations from *Creating a Staff-led Strategic Plan: A Practical Guide for Libraries* [Illustrations], by Katy Mathuews and Ryan Spellman, 2023, (<a href="https://www.bloomsbury.com/us/creating-a-staffled-strategic-plan-9781440879111/">https://www.bloomsbury.com/us/creating-a-staffled-strategic-plan-9781440879111/</a>).

#### Coordinating the Work

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

Communication strategies

Committee	Deadline 1	Deadline 2	Deadline 3	Complete
Environmental Scanning				T Z
Stakeholder Research				SH L
Plan Drafting				Zm
Core Committee				





### 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



#### GOAL 7: Build a Robust Assessment Programme RESULT: EVIDENCE-BASED INNOVATIONS, DECISION MAKING, AND EVALUATING SUCCESS Outcome 7.1: Assessment tools established and implemented by programme and Campus Outcome 7.2: Evidence-based staff evaluations Outcome 7.3: Evidence-base Outputs and evaluating success 1. Establish and implement output-based performance and measurement for all library Outputs 1. 2 appraisals performed by all Library Staff appraisals done on a biannually basis 2. Recruit Library Administrator to support the Outputs 1. Circulation Policy develope 2. Library Staff each develops a Performance library's assessment programme implemented 3. Gather usage statistics for all library Agreement as a basis for biannual appraisals 2. Collection Management pro 3. 2 Quarterly reports produced per campus library programmes and services 4. Google analytics Code incorporated into the based on assessment tools - specifically staff 3. Staff job descriptions revised Library OPAC, BUIR, and Subject guides to performance. track access and actual usage of library 1. Establish a Library wide assessment plan aligned with strategic planning activities at the programme, Faculty, and University levels 2. Identity strategic and tactical metrics for use in Library assessment activities 3. Implement mechanisms for routine access and dissemination of data useful in evidence-informed decision making at every level of Library

4. Augment library staff development to meet the requirements of dynamic library programmes and services in an academic control

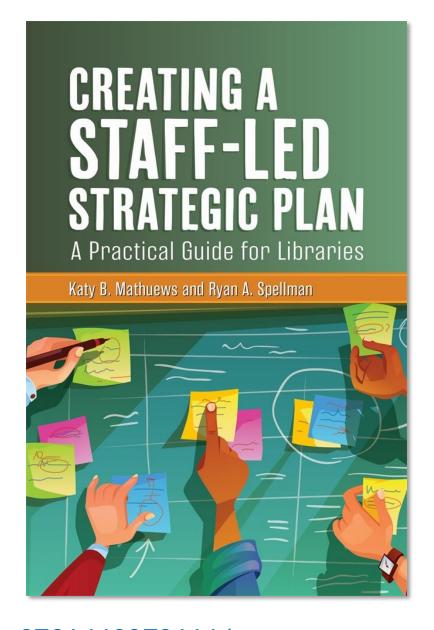
5. Increase collaboration with university administrative units like Quality Accurance Directors of

## **Conclusion Thank you!**

Want to continue the discussion? Reach out to us!

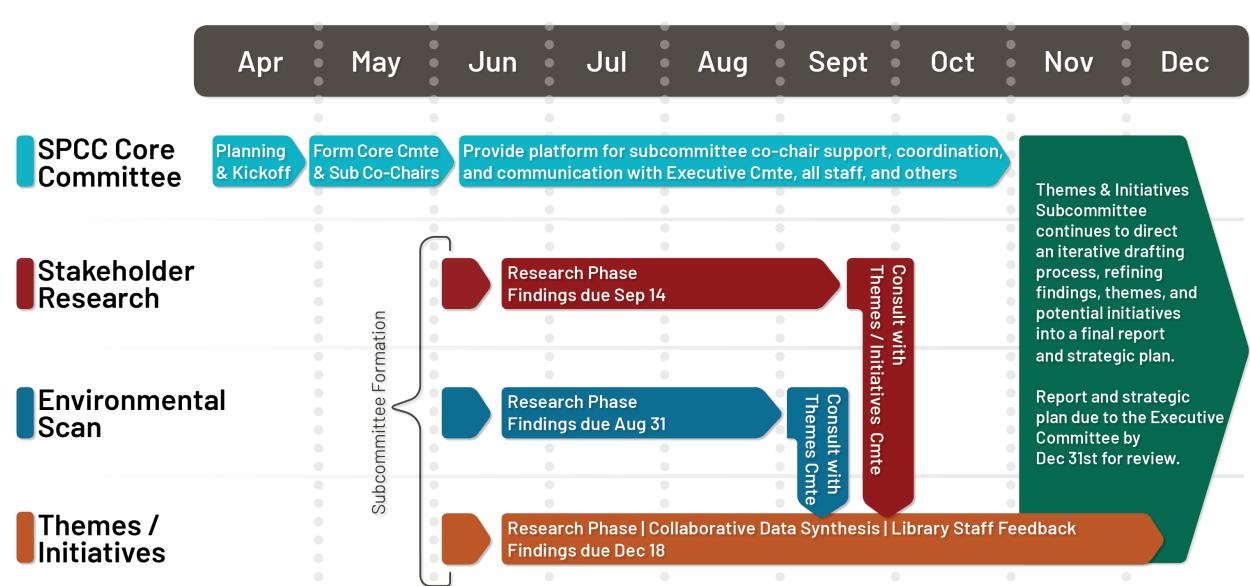
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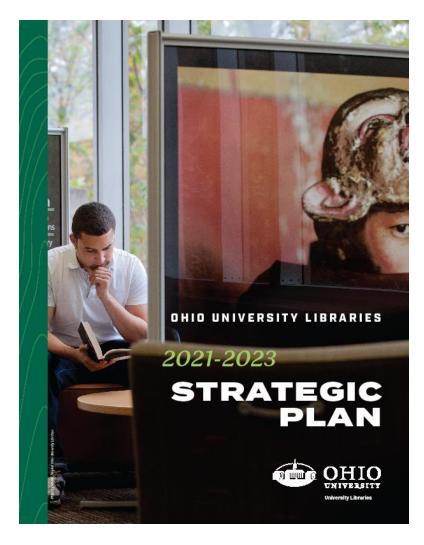


https://www.bloomsbury.com/us/creating-a-staffled-strategic-plan-9781440879111/

#### Overview of the Process that Inspired Us



#### Ohio University Libraries Strategic Plan



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