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## Strategic Priorities: A Roadmap through Change for Library Leaders

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## Strategic Priorities: A Roadmap through Change for Library Leaders

Anne Marie Casey

### Introduction

Twenty-first century academic libraries need to adapt on a regular basis because external forces such as increased pressures from the institution and accreditation organizations, emerging technologies, or budget reductions create new conditions.<sup>1</sup> In a twenty-year period ending in 2008, academic library spending shifted substantially from physical to electronic resources and from staff and student salary lines to professionals,<sup>2</sup> signaling profound changes in the way libraries do business. “Then just as academic ... libraries were settling into these new behaviors, the worst recession in seventy-five years occurred, forcing many ... to concern themselves with survival and making difficult decisions based on reduced levels of funding.”<sup>3</sup>

The Great Recession of 2007-2009 caused dramatic and recurring budget reductions in many colleges and universities in the United States. Public support for higher education declined overall by 3.8 percent from fiscal year (FY) 2007 to FY 2012.<sup>4</sup> These reductions forced many academic libraries to focus on survival rather than improvement. Managers faced difficult decisions, which included the elimination of positions, cancellation of subscriptions, inability to replace technology, and reduced hours of opening. The results of these decisions vary widely depending on the ways libraries plan strategically and prioritize the work they do.

Strategic planning is a formal process through which an organization envisions the future and develops the procedures and operations necessary to achieve it,<sup>5</sup> Its essence is the allocation of resources to those opportunities most likely to move the organization to its ideal future position instead of across-the-board allocations or cutting support proportionately without regard to how closely an operation aligns with the mission or the ideal future position.<sup>6</sup>

### Problem Statement

Establishing priorities as a part of strategic planning states publicly what the core functions or services of an organization are. By committing to specific priorities, an academic library can allocate resources to the areas of greatest importance and set goals that advance that organization in the direction of meeting the highest priorities. During times of relative

stability, priorities offer a guide to allocating funds and maintaining staffing patterns for important functions and services. In less favorable periods, such as an economic downturn, priorities may guide administrators through the reallocation of budgets, the reorganization of staff, or the redesign of services.

In spite of the potential benefits of established strategic priorities within any organization, no research has examined them in the context of academic libraries. This study fills that void by investigating how libraries use strategic priorities in planning and decision-making during a period of profound change. It explores whether libraries maintain, adjust or abandon their priorities when faced with the unexpected and how their decisions impact services and staff.

## Literature Review

### Strategic Planning and Priorities in Academic Libraries

Strategic planning in academic libraries dates to the late 1960s<sup>7</sup> and became much more popular in the mid-1980s as a response to the complexity of issues facing academic libraries, such as budget reductions, the introduction of new technologies, and the expectation that libraries do more with less.<sup>8</sup> Academic library strategic plans are generally linked to those of their parent institutions,<sup>9</sup> but beyond demonstrating support for the institution, strategic planning can provide a means for the library to identify competition,<sup>10</sup> technological innovations that lead college and university administrators to question the role of the library in current and future academic institutions,<sup>11</sup> and provide a means of demonstrating the value of the library in advancing the institutional mission.<sup>12</sup>

Matthews lays out a set of questions designed to help library managers set strategic priorities.<sup>13</sup> These include considering what the competition is (e.g., the Internet) and understanding current and future trends. Dillon reminds managers that in defining priorities in academic library strategic planning, it is important to recognize that there are multiple stakeholders, some of whom, such as institutional administrators, are not direct users.<sup>14</sup> Curzon urges library administrators to focus on continuous planning rather than to allow external crises to force a library to identify its priorities under stress.<sup>15</sup>

Several studies of priorities in academic libraries examine them in relation to those of the parent institution. Hughes found that directors and chief academic officers (CAOs) from the same institutions demonstrated a large lack of congruence in what they designated library priorities.<sup>16</sup> McNichol also discovered a discontinuity in priority-setting between institutional and library strategic planning.<sup>17</sup> Library directors in her study reported that they had difficulty

contributing to institutional goals because there was a lack of understanding by other administrators about ways in which institutional priorities related to the library.

The Cornell University Library created a concordance of priorities found in the 2008 plans of the university and several of the colleges and learned that those of the library supported the priorities of the university as well as of the individual colleges. After completing this compilation, library administrators embarked on a process to develop new interventions rather than relying on old methods to support university priorities.<sup>18</sup>

Other research on priorities in libraries includes a description of new service priorities developed by the Australian National University Library after experiencing budget reductions. The managers at this library surveyed users to discover their perceptions of the library after the reprioritization had occurred and learned that users agreed with the choices the library had made.<sup>19</sup> Another discusses a survey conducted by the library of the National Museum of Scotland to aid in establishing priorities that best served user needs.<sup>20</sup> In addition, Perry writes about a survey administered to members of library consortia by the International Coalition of Library Consortia in order to determine the top priorities of these organizations.<sup>21</sup>

There are also several descriptive articles that touch on strategic priorities in academic libraries. One depicts a reprioritization of workflow in the cataloging department at Cornell University in the 1990s.<sup>22</sup> In another, Chan describes a process the University of Hong Kong initiated to define new acquisitions priorities to better allocate funds for electronic materials.<sup>23</sup> In addition, the University of Oregon libraries conducted an analysis of their technical services department to develop strategic priorities focusing on key processes and eliminating work no longer deemed important.<sup>24</sup>

## Research Design and Methodology

The investigator used a multiple-case study design in which three different academic libraries were investigated.<sup>25</sup> The case study method allows researchers to explore characteristics of a real-life situation such as an organizational or managerial process in order to understand that process better from a variety of viewpoints (Yin, 2009).<sup>26</sup> The three cases were chosen from a list of institutions with the Carnegie classification of Masters L<sup>27</sup> in the states of California, Michigan, Nevada, Rhode Island, and South Carolina. These five states had the highest unemployment rates in the United States in late 2009<sup>28</sup> and economic difficulties were widespread, including budget reductions to public institutions of higher education.

At the time of the search, there were 50 Masters L institutions in the five states.<sup>29</sup> Of those, five were eliminated because they were branches of nationwide universities. The investigator then searched the web sites of the remaining 45 institutions for library strategic plans. Of those, 14 showed no evidence of library strategic planning. The majority of the remainder (31) displayed mission statements, vision statements, and in some cases general goals on their library web sites. Five had more substantial library strategic planning in evidence, including links to multi-year strategic plans and annual reports, but only three were current. Those three, in the states of California and Michigan, were selected to serve as the sites of the case studies. The investigator invited the directors of each, designated as Cases A, B, and C, to participate in this study and they all agreed. She spent two days at each of the sites in the summer of 2010.

Data collection consisted of personal and focus group interviews as well as analysis of documentation. It explored questions about academic library strategic priorities and their use in planning and decision-making from the perspective of the institution, library senior managers, librarians and library staff. The investigator conducted in-depth personal interviews with the library director and the chief academic officer (CAO) in each institution. She also led three focus group interviews at each of the sites, one with the library management team exclusive of the director, another with a volunteer group of librarians, and a third with a volunteer group of library support staff. All of the interviews were audio-recorded with permission of the participants. A second source of evidence was obtained through a content analysis of relevant documents. These included strategic plans, memos, staff meeting notes, and other internal reports.

The investigator manually coded the documents and transcripts in two phases. The first was to search for keywords related to concepts proposed by Kotter<sup>30</sup> (1989) delineating the properties and traits of management and leadership activities. The second was to explore for themes<sup>31</sup> that arose across the cases that appeared relevant but were not specifically solicited in the interview questions.

To ensure validity and reliability, the investigator conducted a pretest case study in March 2010 at a public university in New England, which had experienced budget reductions and whose director is skilled in strategic planning. Based on the feedback from the pretest participants as well as a lengthy debriefing with the library director, the investigator made some minor changes to the interview questions. In addition, three reference librarians developed the list of keywords that the investigator used for coding the documents and transcripts and four

librarians coded portions of interview transcripts and a selection of documents to ensure intercoder reliability.

## The Three Cases

### Case A

At the time of the site visit, the Case A university was anticipating a \$25 million reduction in its state allocation over the previous fiscal year. The library had experienced budget shortfalls over an extended period of time; the recession increased the magnitude of the reductions. By the summer of 2010, the library had lost 16 positions due to attrition, reduced the amount of time the building was open by eight hours a week, and was experiencing a ten percent reduction in workforce due to mandated furlough days.

Case A had a formal strategic plan for many years dating to the beginning of the director's tenure. A current, general version was on the website and included a list of six priorities as well as mission, vision, and values statements. The management team developed annual goals that reflected current institutional needs and trends in academic library service provision. The director prepared an annual report demonstrating where each of the library goals and priorities support those of the university.

### Case B

Case B was only beginning to experience effects of the recession in the summer of 2010. This university was insulated somewhat from the recession because its growth over the first decade of the twenty-first century was strong, resulting in annual increases in tuition revenue. While the library did not experience a reduction to its FY 2011 allocation, the management team assumed available increases would not match inflation, so they had begun to examine areas in which they could streamline or reduce in order to maintain priorities.

The library was also undergoing some substantial changes in the lead-up to moving into a new multi-use learning commons. Encompassing tutoring services and information technology offices, the new building was envisioned by the university administration as one in which library services would integrate more fully with other academic support areas. This was driving considerable change in the library, including the consolidation of service points and the redefinition of librarian and technician jobs.

Strategic planning at Case B dates to the arrival of the current director. The management team developed a five-year plan for the period from 2008 to 2013, which included five priorities. This is the plan and priorities the investigator had access to prior to the site visit and served as the basis for her investigation.

## Case C

The Case C institution experienced a reduction of over \$12 million in FY 2011, but also saw decreasing allocations over a period of several years prior. The budget reductions resulted in a number of changes to the library, including the inability to replace personnel and the need to reduce the information resources' budget. Furthermore, restrictions imposed by faculty and staff labor unions prohibited the management team from making decisions about moving funding from vacant positions to the operating budget where they saw a greater need.

Formal library strategic planning has been in place since the hiring of the current director over a decade earlier. The library managers and librarians created three-year strategic plans. The plan current at the time of the site visit contained three priorities. As budget problems worsened, the library managers focused on those areas of strongest priority, which included reducing some core directions from an earlier strategic plan in order to ensure nimbleness. They also mapped the job descriptions of library personnel to the strategic priorities in order to calculate the percentage of time each person spent in supporting the priorities.

## Findings

### Case A

The library managers at Case A stated that they kept priorities in mind as they responded to the effects of the recession. They adjusted their annual goals to reflect changing resources, but priorities remained intact. When the management team changed programs, staffing, or service commitments because of budget reductions, team members stated that their priorities were so well-integrated into their operation that they did not have to discuss whether those changes fit the priorities.

The director said she considered one priority, stating that the library would be the foremost provider of information resources to undergraduates, to be the highest of the library priorities because it represented the library's core values. Others agreed with her. Participants in each of the interviews discussed the importance of maintaining collections that support the

curriculum; the necessity of providing access to these information resources; and the benefits of instructing students in their availability and use.

This priority encompasses both collection development and instruction. In regard to the former, participants stated that there had been considerable reductions to the library information resources allocations even before the recession. As a result, library personnel said they analyzed the collections and their use in order to eliminate duplication as well as to discontinue collecting in areas that no longer supported current curricular needs. They mentioned that they converted collections to electronic format wherever possible to increase access and they formed partnerships with academic departments to acquire expensive information resources the departments considered vital. The director also discussed collaborating with the student government association (SGA) to establish a textbook reserve collection funded by the SGA.

The CAO touched on the emphasis the library placed on providing core information resources electronically. He remarked that a substantial change in the library in recent years had been the leveraging of consortial collections of digital resources so that in spite of the library reducing personnel and acquiring fewer print materials, it still provided the information resources users needed and expected.

Librarians discussed avenues of service improvement they were exploring to support their priorities. Among these were access to a consortial web-scale discovery tool and enhancements to the library web site to enable more efficient searching capability. In addition, a statement in a planning document indicates that the library was upgrading the technology in its information commons and satellite computer lab and investing in other new library technologies as they become available, affordable, and deemed useful.

The instruction priority also received attention during the interviews. Staff, in particular, discussed how important it is to the director. Since she began in this position, the library progressed from offering few to no library instruction sessions a year to offering over 1,000 in the 2007-2008 academic year. In addition, librarians had increased library instruction in the learning management system (LMS). As the university developed more hybrid courses, librarians partnered with faculty to deliver instruction, assistance, and access to resources through the LMS.

Participants listed various changes they had made in response to the budget reductions that allowed them to continue to support the highest priority. In one example they discussed a workflow analysis and subsequent reorganization of the technical services department. The director added that one way the library maintained service priorities during the hiring freeze was by moving positions from technical services to higher priority departments. Librarians also

discussed changes in the reference department aimed at maintaining the library's commitment to its highest priorities, such as adding a texting option for reference assistance.

Staff members voiced concern at possible effects of repeated budget reductions on service. One said, "[We] have been traditionally known for student assistance." The CAO verified this when he spoke about the library extending hours of operation in spite of recurring budget reductions. In addition, staff members talked about engaging in direct service more often to cover posted desk hours that had previously been staffed by student employees.

The librarians described several examples of assistance they provided to each other and to academic faculty members to maintain service during university-mandated furlough days. They offered to teach library instruction classes to students whose professor was taking a furlough day so the class was not canceled. In addition, librarians volunteered to assume the assigned duties of colleagues on their furlough days so the maintenance of library operations appeared seamless to customers. One stated that, "The boat is sinking, but we have plenty of floaters to share, and so we will try together to keep afloat."

## Case B

In general, Case B interview participants agreed that priorities guided library decision-making about new initiatives as well as the abandonment of programs that were no longer core. Members of the management team reported that they consciously considered priorities when discussing changes made as a result of the recession and chose not to pursue programs and services that did not align with current priorities. The perceptions among librarians and staff, as well as those outside the library, are that managerial decisions are strongly tied to library priorities. In fact, the CAO remarked that if the library changed any priority because of decreased funding, that change was related more to time needed to completion than to the substance of the project.

When the library reallocated funds, reconfigured staffing patterns, or changed service commitments, the strategic priorities provided a framework for their decision-making. One example the management team gave is an analysis of subscriptions that they undertook to target for cancellation those titles that no longer supported institutional priorities as well as to convert as many as possible to electronic format to provide better access. In another, they talked about reconfiguring a librarian position to include responsibility for managing an institutional repository (IR) so that they might ensure the success of the priority to enhance faculty commitment to the IR. In addition, other changes to service commitments, such as

developing a consolidated service desk, related strongly to the priority of adapting traditional services for the new information commons the university was constructing.

At the time of the site visit, Case B was planning the layout of the new building, which was expected to be a major change from the traditional library. A fund-raising document describing the facility specified a design that would be flexible and contain a variety of academic support departments collaborating in a customer-centered space. The management team stated that planning for the new building was a touchstone in their discussion about library innovation.

Participants also spoke about changing the role of liaison librarians to support a vision of a different type of library, one that would anticipate and meet the needs of future stakeholders rather than only adapting and restructuring on a case-by-case basis. The director said, “We have shifted from trying to reach students to trying to reach faculty and the deep partnerships in the future are going to be with faculty. Students will come in because of that.” In addition, the strategic plan states that librarians have “repositioned themselves as consultants, spending more of their time proactively making connections within the departments with whom they liaise rather than waiting for questions to be asked at the traditional reference desk.”

Restructuring positions to support the priorities of adapting traditional library services for the learning commons and taking a leadership role in the implementation of an IR figured prominently in the interview discussions. The director spoke about a shift in the way that she and her management team viewed the library priorities and the personnel who are most likely to carry out the associated goals. In particular, she touched on the restructuring of the technical services department, which included the outsourcing of work, such as original cataloguing, that was no longer part of daily operations.

Another priority, which focused on professional development for librarians and staff, figured prominently in the director’s interview. She said that she encourages library personnel to attend conferences and participate in workshops and scholarly activities in order to develop personally and professionally, in spite of dwindling resources. The librarians and staff reported that they appreciated this support and participated in professional development activities as much as possible.

### Case C

Case C interview participants indicated that the library was using its priorities in planning and decision-making in its response to the recession. They reported that their conversations in

meetings commonly centered on how best to provide access to their resources, which is the top priority. The librarians stated that, “We really had the students and the students’ needs at the front of every decision we have made [in response to budget reductions].”

The CAO said the library is proactive in planning and the library managers anticipated budget reductions and prepared for them, perhaps better than any other unit in the academic division. He remarked that the director “deploys her dwindling human resources where they are most needed and where they continue to support the end-user.” He remarked that the library played an important role in supporting the priorities of the academic division and the university.

The library managers mentioned that they did not have much flexibility in budgeting because many of their allocations were earmarked for personnel lines, yet they were generally unable to fill positions. They were, however, cross training staff and asking librarians to take on additional roles. With fewer personnel than ten years earlier, librarians remarked that the library was offering more services because of a clear focus on the most important priorities, and the flexibility of librarians and staff members who were willing to work in other areas or assume new responsibilities.

One of the strategic priorities focused on digitizing library resources. Members of the management team referred to this priority in their discussion of the digitization of a particular special collection. They said that this project would continue in spite of any reductions in budget because of its importance. In fact, they discussed staffing pattern changes they made to ensure its completion.

Regarding a priority related to providing access to information resources, the respondents reported that it had been impacted over the years of the budget reductions in approach but not in substance. With a continued decline in the materials’ budget, library personnel analyzed the collection and conducted evaluation among stakeholders in order to ensure that where possible, they were licensing the electronic materials that best supported ongoing curricular needs and increased access. In response, librarians reported that the library was purchasing fewer print books and acquiring access to more electronic resources as well as participating in consortia to provide additional information resources as well as to extend reference service availability. Library personnel also said they regularly updated the web site to enable users to find information more easily.

All of the respondents agreed that service to the students was the most important priority. Analysis of documents bears this out. Participants gave examples of personnel who volunteered to open the library on a university-imposed furlough day in order to provide students with a place to study for final examinations. They also mentioned other examples of adding

services, such as help-desk support for general technology, because students could not find that assistance elsewhere due to budget reductions and staff shortages in other university departments.

## Discussion

Each of the cases appeared to consider formal planning and its relationship to the budget as important. These libraries initially emerged as potential case study sites because they were among a small number in the initial population with ongoing strategic planning processes that are publicly available. In each, formal strategic planning had been in place for several years, generally aligned with institutional planning, and incorporated input from library employees. For the most part, the library managers, librarians, and staff considered the strategic priorities as they reacted to changes in their environments.

At Case A, where multiple years of budget reductions resulted in cuts to services in several areas, employee morale seemed relatively high. This may be due to the fact that library personnel all appeared to understand that the first of the six priorities listed in their plan was the most important, and as conditions worsened, their focus narrowed in on that priority. Library personnel agreed that providing access to information resources for undergraduates was the most important thing they did. Therefore, the decisions they made regarding resource allocation, staffing, and service changes reflected that. The director negotiated with the SGA to obtain funding for a textbook reserve collection to help students, who had difficulty affording required books. The reference librarians offered an additional access point to enhance their availability to students, in spite of reductions in their department, while technical services librarians conducted a workflow analysis and streamlined operations to free up vacant positions that could be moved to areas that more obviously supported the top priority. In addition, staff supervisors scheduled themselves to work at service points during busy times because they no longer had sufficient funding for student employees and considered desk coverage vital to undergraduate student academic success.

Another interesting aspect of the responses from Case A was the perception that they were all in the situation together and would collaborate and provide support to each other. They employed metaphors that underscored this sense of being set adrift in a difficult situation and helping each other through it for the good of the university and the students. The priorities seemed not only to guide planning but to help the employees know they were all on the same page and performing what they agreed were the most important aspects of their work.

Case B, while only beginning to experience budget reductions, was still reorganizing and innovating in preparation for their new role in a multi-department learning commons. At the time of the site visit they were transforming from a traditional academic library to a more collaborative academic support unit. The management team, in particular, seemed driven by the need to examine every decision in light of the transforming library. They were also implementing plans to restructure their services and the role that librarians play in the academic life of the campus so that the organization would align with the university's vision of the new information commons.

Librarians and staff members seemed to understand what was driving their administrators to move the organization in a different direction. The vision of the library director was to build a new library environment in which services and assistance were available as needed and where librarians assisted in course development and scholarly communications issues. Librarians and staff were aware that this vision was the root of the organizational change and expressed appreciation for the priority the management team placed on their professional development and training in order to ensure the success of the new library environment.

At Case C, the personnel seemed to be maintaining their priorities and providing new services in spite of several years of recurring budget reductions and the inability to make some changes due to institutional processes. The most difficult of the challenges at this library related to institutional and bargaining unit policies and practices that constrained personnel activities and the reallocation of funds. While they acknowledged the difficulties these institutional policies created, library personnel found workarounds to provide the seamless service that was a priority. Librarians shifted responsibilities to alleviate a temporary workforce shortage and staff were cross trained to cover service points they could no longer staff with student employees.

## Conclusion

Analysis of the interviews and documentation from the three cases indicates that while each experienced effects of the recession to varying degrees, the managers of the three libraries relied on their published priorities as they crafted their responses. They all appeared able to maintain those priorities regardless of the external pressures they encountered. If they made changes, it was in small ways, around the edges. They “nip and tuck” as one respondent described it but they maintained their priorities.

Strategic priorities, as they are developed and used by the personnel in the three case libraries, seem to provide a framework for a shared understanding of what is most important. Priorities guided managers as they reallocated resources, restructured services and changed staffing patterns. They went beyond an effective managerial tool, however, in that they served as the focal point for staff and professionals at all levels. Everyone in the libraries agreed about the services and resources that were most important. They bought into the reallocation of resources and transformation of position descriptions and services because they understood those changes were implemented in order to continue to support the library's priorities.

Planning and decision-making are much easier when personnel in an organization share an understanding of the mission, the direction, and the most important of their contributions. There is no need to debate what services to offer, improve or reduce, which information resources to acquire, or how to fill vacant positions if everyone accepts that in lean times, there are certain aspects of an organization that will endure. Library personnel know how to operate under difficult circumstances. They also accept changes that might impact them negatively because they see that efforts are going to preserving what they all agree is most important.

This study investigated three libraries in two states. Although they vary in size, they are similar in many other ways. Each is affiliated with a public institution and they all have publicly-available, current formal strategic plans, which date to the beginning of the tenure of the current director. It is possible that the findings were similar because the nature of the institutions is comparable and because they all have leaders who engage in formal strategic planning. While the results point to the use of strategic priorities as an effective guide through rapid change in these libraries, only further research can determine whether this would be true in different libraries and under other circumstances or leadership styles.

The effects of the Great Recession continue to rebound years after it officially ended. Academic and public libraries still experience budget reductions and may be forced to do more with less for a long time. Investigating the use of priorities in libraries and the style of leadership that makes effective use of them to steer their organizations through turbulent periods would be of benefit to most organizations.

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27. Carnegie Foundation for the Advancement of Teaching, "Institution Lookup," accessed October 21, 2009, [http://classifications.carnegiefoundation.org/lookup\\_listings/institution.php](http://classifications.carnegiefoundation.org/lookup_listings/institution.php).
28. U.S. Bureau of Labor Statistics, "Unemployment Rates for States: 2009," accessed October 21, 2009, <http://www.bls.gov/lau/lastrk09.htm>.

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29. Carnegie Foundation for the Advancement of Teaching, "*Institution Lookup*," accessed October 21, 2009.

30. John P. Kotter, *A Force for Change: How Leadership Differs from Management* (New York: The Free Press, 1990).

31. Themes that emerged include employee participation, strong service ethic, and data-driven decision-making.