



Research Article

University Community Engagement and the Strategic Planning Process

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Abstract

Objectives – To understand how university libraries are engaging with the university community (students, faculty, campus partners, and administration) when working through the strategic planning process.

Methods – Literature review and exploratory open-ended survey to members of CAUL (Council of Australian University Librarians), CARL (Canadian Association of Research Libraries), CONZUL (Council of New Zealand University Librarians), and RLUK (Research Libraries UK) who are most directly involved in the strategic planning process at their library.

Results – Out of a potential 113 participants from 4 countries, 31 people (27%) replied to the survey. Libraries most often mentioned the use of regularly-scheduled surveys to inform their strategic planning, which helps to truncate the process for some respondents, as opposed to conducting user feedback specifically for the strategic planning process. Other quantitative methods include customer intelligence and library-produced data. Qualitative methods include the use of focus groups, interviews, and user experience/design techniques to help inform the strategic plan. The focus of questions to users tended to fall towards user-focused (with or without library lens), library-focused, trends and vision, and feedback on plan.

Conclusions – Combining both quantitative and qualitative methods can help give a fuller picture for librarians working on a strategic plan. Having the university community join the conversation on how the library moves forward is an important but difficult endeavour. Regardless, the university library needs to be adaptive to the rapidly changing environment around it. Having a sense of how other libraries engage with the university community benefits others who are tasked with strategic planning.

Introduction

Contributing to student success and demonstrating value are growing trends in academic libraries (Connaway, Harvey, Kitzie, & Mikitish, 2017; ACRL Research Planning and Review Committee, 2016). In trying to discover how one engages with the university community, it becomes “imperative to co-create, rather than dictate, value to users” (Peacemaker & Stover Heinz, 2015, p. 270). Engaging users to help inform library strategic plans emphasizes our concerted effort to become more user-centred organizations (White, 2012). Strategic planning is a necessary undertaking in most university libraries, but information about how academic libraries are involving and engaging with the university community in that planning is limited. Through a literature review and an open-ended, exploratory survey with librarians from Australia, Canada, New Zealand, and United Kingdom, the focus of this paper is to understand how university libraries are engaging with the university community (students, faculty, campus partners, and administration) when working through the strategic planning process.

Literature Review

Direct communication and engagement with the university community helps “an organization adapt quickly to the unpredictable and rapidly changing environments most organizations face” (Cervone, 2014, p. 163). Strategic planning is a formal process that involves an organization envisioning the future and developing the procedures and processes needed to achieve it

(Goodstein, Nolan, & Pfeiffer, 1993). Most higher education institutions ask two fundamental questions when planning: what should we be doing (scanning external conditions) and how well do we do what we do (evaluating internal operations) (McIntyre, 2012).

Whether a business or non-profit body (including a library, specifically), understanding the needs of the users or customers of an organization is part of strategic planning. “Listening to the voice of the customer will ensure that the library understands the perceptions of its customers and the value the library provides rather than drawing conclusions and inferences using the myopic vision of a library’s assumptions and beliefs” (Matthews, 2005, p. 101). Planned strategy and identified customer needs must be aligned and clearly communicated in order to promote a sense of unique user defined value (Germano & Stretch-Stephenson, 2012).

University community engagement means the involvement of faculty, students, campus partners, or administrators in the library strategic planning process. The literature on library strategic planning and university community engagement is surprisingly limited. Many papers refer to its importance, but the main theme of the paper relates to something else (e.g., a specific aspect or a case study on a library’s planning process). Some refer to the importance or strategies of the communication of the plan to its audience(s), but not necessarily on the “how” of involving users in the actual

planning process (Jacob, 1990; Matthews & Matthews, 2013; McNicol, 2005).

Germano & Stretch-Stephenson come close with a paper that focuses on marketing's role in strategic planning. They state that strategic plans have a better chance of being successfully implemented if the focus is "reoriented towards understanding patrons in a way that considers their needs as well as the role the library plays in their overall information seeking behaviours" (2012, p. 75). This is not an easy task. Connecting patron attitudes and needs with planning service goals is a significant difficulty for university libraries (Germano & Stretch-Stephenson, 2012).

Quantitative Methods

Decker and Höppner (2006) discuss the use of customer intelligence in academic libraries to inform planning. Examples of customer data include anonymized lending data and data found through card swipes when entering the library or using various services (which may not be anonymized). Examining library patron data has been a topic of increasing discussion in assessment conferences and papers, much of it surrounding the need to demonstrate library value to university administration (Matthews, 2012; Beile, Choudhury, & Wang, 2017; Renaud, Britton, Wang, & Ogihara, 2015). However, there are concerns regarding the privacy of this data (Varnum, 2015; Chen et al., 2015).

Strategically analyzing a variety of data routinely gathered in the library helps to provide clear direction for future decision making. Examples include interlibrary loan and circulation statistics, gate counts, usage data (electronic resource usage data, website visit, or log files), and service data (equipment lending or help desk visits) (Huff-Eibl, Miller-Wells, & Begay, 2014).

Looking external to the library, national surveys help to understand different user groups, with institution-specific information available through

many institutional research offices at individual universities. These surveys measure students' engagement, experience, and satisfaction levels of different aspects of university life. Libraries and their institutions can glean information not only on students' research and learning needs, but also their levels of engagement and satisfaction with library services, resources, and space. These include (but are not limited to) NSSE (National Survey of Student Engagement, US & Canada), CGPSS (Canadian Graduate and Professional Student Survey), NSS (National Student Survey, Higher Education Funding Council for England), and AUSSE (Australasian Survey of Student Engagement).

LibQUAL+ is a web-based survey offered by the Association of Research Libraries that measures library users' views and levels of service quality (ARL, n.d.). It can be used for both quantitative and qualitative analysis (survey data versus comments). There are some papers specifically related to LibQUAL+ and its use in strategic planning. Stewart Saunders (2008) found that although LibQUAL+ ultimately informed Purdue University Library's planning, the survey data initially limited their focus and confused the issues of strategic versus operational planning. While mostly used as a measurement system to address various objectives in the strategic plan, the University of Florida used LibQUAL+ results as a "discussion-starter" with their primary user groups (Shorb and Driscoll, 2004, p. 176). Piorun (2011) interviewed five leaders of strategic planning in academic health libraries. All five libraries used LibQUAL+ as the primary way of reaching stakeholders to inform strategic planning. In this and other papers on LibQUAL+, all libraries also analyzed the comments to help get a deeper understanding of needs.

Qualitative Methods

Bowling Green State University Libraries (Haricombe & Boettcher, 2004) and American University Library (Becher & Flug, 2005) informed their strategic plans by carefully

mapping focus group questions to the quantitative data from their LibQUAL+ surveys. Focus groups can help validate or challenge quantitative survey findings. As part of a larger discussion on the library planning process, Nutefall (2015) briefly mentioned the use of focus groups of students and faculty to gather feedback on three priority areas (engagement, collections, and learning environments) that the planning committee deemed had the most impact on the university community. Higa-Moore, Bunnett, Mayo, and Olney (2002) integrated focus groups into the university library's long-term planning process. Although there were benefits of raising the library's profile and reinforcing the perception of being customer-oriented, a key disadvantage is that it is very labour-intensive and expensive to carry out on a large scale. Moreover, precautions need to be taken to ensure that diverse perspectives are sought, as the views of highly engaged users may create disproportionate influence (Peacemaker & Heinze, 2015).

User Experience (also referred to as UX) "is a suite of techniques based around first understanding and then improving the experiences people have when using our library services. It utilises ethnography and design to achieve this" (Potter, n.d.). Ethnographic research (including the use of observation, field notes, interviews, and other techniques) can provide rich information that helps to understand the experience of the user. Priestner and Borg (2016, p. 3) state that "...we are not our users, and just because they carry out tasks in a way that is alien to us does not mean that their way is wrong or broken. Instead, we need to see their approach as an opportunity to learn and discover." Although an example of community college as opposed to library-specific strategic planning, McIntyre (2012) described the use of qualitative methods like ethnography as providing important context for identifying and prioritizing strategic planning goals. With more universities focusing on the "student experience," examining how users are

experiencing academic libraries is something that cannot be ignored (Priestner & Borg, 2016).

Other Methods

A small number of papers discussed other methods to involve users in the strategic planning process. The University of Arizona libraries used a combination of metrics (i.e., circulation data, gate counts, and number of questions asked at service points), feedback comments (Library Report Card), unmet customer needs, observational data (headcounts plus type of activity), LibQUAL+ results, and an annually administered survey to understand the voice of the customer (Huff-Eibl, Miller-Wells, & Begay, 2014). Eastern Washington University Libraries had an unprecedented opportunity of receiving funding for a strategic planning grant to hold a two-week institute for faculty to develop a vision for the future of the library. As incentive, faculty stipends were equivalent to teaching a summer course. Although there were many presentations from a variety of library staff on various aspects to consider for the strategic plan, one of the highlights of the institute was attending a panel of four undergraduate students (with different majors) who spoke about their research habits (Miller, 2009). University of California San Diego Libraries used an "open-ended" approach to gathering feedback from students and faculty. The planning working group wanted to encourage users to "think broadly about the role of information and existing and possible new library services and spaces" (p. 3) and thus mostly avoided questions about traditional library services. Although not going into the details of how they spoke to users (it wasn't clear if they conducted interviews or focus groups or something less formal), they did get "on-the-fly" input from a link on their website and from white boards in public areas which users could use to respond to specific questions (Williams, Nickelson Dearie & Schottlaender, 2013).

Table 1
Response Rate and Country of Origin

COUNTRY	# RESPONDENTS	POTENTIAL TOTAL PARTICIPANTS	RESPONSE RATE
Australia	11	39	28%
Canada	13	29	45%
New Zealand	4	11	36%
United Kingdom	3	34	9%

Aims

Through a combination of a literature review and an exploratory, open-ended survey, this paper will seek to understand how university libraries are engaging with their community (students, faculty, campus partners, and administration) when creating a strategic plan. What kind of techniques are libraries using to engage with the university community? What kinds of questions are they asking their users to help them form the strategic plan? What has been helpful (and not) in this process? Getting a sense of how other libraries are engaging with the university community will benefit others who are tasked with strategic planning. The emphasis of this research is on the process to get to the strategic plan and not on the strategic plan itself.

Method

In the Fall of 2016, the researcher sent an online, open-ended, exploratory survey via email to the executive directors of CAUL (Council of Australian University Librarians), CARL (Canadian Association of Research Libraries), CONZUL (Council of New Zealand University Librarians), and RLUK (Research Libraries UK). The executive directors were asked to send the survey to their members, requesting the person most directly involved in the strategic planning process to answer the survey (e.g., the university librarian, an associate university director, an assessment librarian, or other). Respondents were asked questions related to the process used

for creating their strategic plans, including what was helpful (or not), kinds of questions asked of the community, and words of advice for those starting a strategic planning process. (See the Appendix for the complete survey).

Results

The main focus of this article is to examine different approaches regarding the engagement of the university community (students, faculty, campus partners, and administration) when undertaking a strategic planning process. Out of a potential 113 participants from 4 countries, 31 people (27%) replied to the survey. University locations are divided below, but are discussed as a whole throughout the paper because of the emergence of themes regardless of location. A total of 28 out of the 31 respondents stated that their library had a strategic plan. Two responded “no,” and one skipped this question.

Out of the 28 respondents with a strategic plan, 23 mentioned some sort of user engagement in their replies. Libraries used a variety of techniques to gain user feedback for strategic planning purposes. Some only mentioned one, while others pointed out that they used a “variety of tools” and a “combination of activities.” The average (mean) number of methods used by university libraries is two, with the most often occurring number (mode) being one and two activities. Three universities use four activities. Figure 1 illustrates the kinds of methods used to engage with the university community.

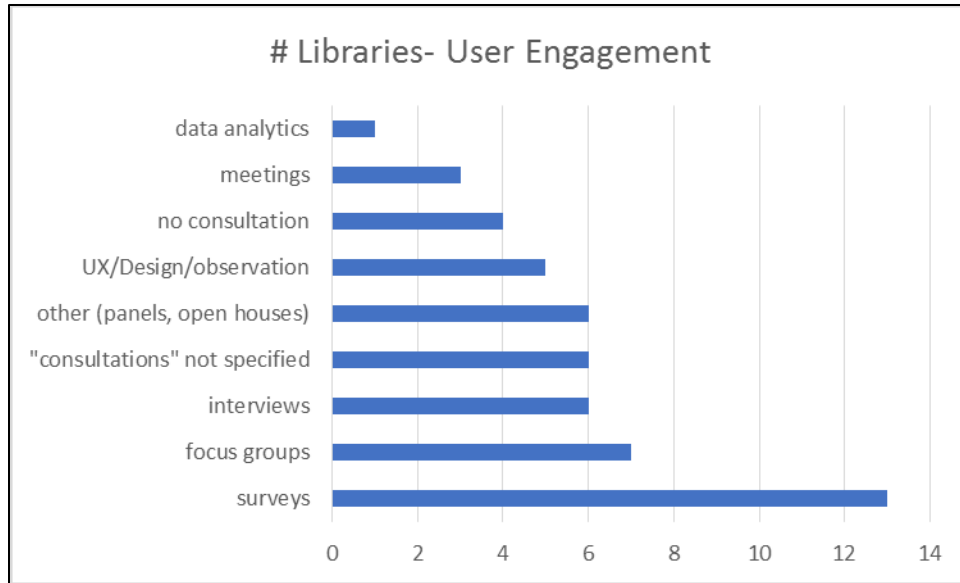


Figure 1
Methods used to engage with the university community.

Quantitative Methods

Quantitative methods highlight the use of data generated from a number of sources. This can include internal library systems (e.g., electronic usage statistics, circulation or other service statistics), university systems (e.g., student admissions data), and survey responses (either library or university-based).

E-Resource Data & Data Analytics (University & Library)

Quantitative methods found in the open-ended survey responses focus on customer intelligence, library-produced data, and survey results. Only one library (making three comments throughout the survey) discussed taking advantage of e-resource use data and data analytics from university and library-based resources to help inform strategic planning. They commented that “Library use data for e-resources, and services such as online chat, etc. have ... better informed our planning” and they use “data analytics from university systems including learning management and library systems.”

University offices of institutional research can also provide data on student and faculty populations. One respondent explained:

All is helpful [in strategic planning] but especially data that is now available from the University’s business intelligence system including student, admissions, student load and projections, finance, staff, research and quality. University staff have access to aggregated data which means that our teaching, liaison and research librarians, and repository staff can access and use this for their own planning throughout the year.

Survey Data

Libraries most often mentioned the use of regularly-scheduled surveys to inform their strategic planning (n=13 libraries). These included LibQUAL+, satisfaction surveys, Ithaka, Insync, university surveys, and other surveys (non-specified). Many libraries expressed the reality that the timing of the strategic planning process was quite restrictive (Newton Miller, in press). Stephan (2010) found

that having much of the data already gathered was very helpful when working on a strategic plan on a very short timeframe. Regularly-scheduled assessment activities seem to help truncate the process for some respondents and help to reduce “over-surveying,” as opposed to conducting user feedback specifically for the strategic planning process. One respondent said:

Every 3 years we conduct an extensive client satisfaction survey that asks clients what is important to them and how we are performing. The responses are benchmarked against other academic libraries There are so many surveys used now within higher education that there is a backlash from clients about over-surveying so we are very careful to communicate by closing the feedback loop and not over survey and waste clients' time.

Another commented: “We run a bi-annual Client Library Survey which identifies opportunities for improvement as well as a performance assessment which is benchmarked across our sector.”

Qualitative Methods

Qualitative methods emphasize the use of focus groups, interviews, and user experience/design techniques to help inform the strategic plan by better understanding user needs.

Focus Groups, Meetings, & Interviews

Undergraduates, graduates, and faculty were involved in focus groups in seven libraries. Three libraries mentioned “meetings” with users. Six libraries spoke of using client interviews in the strategic planning processes. Examples include using “interviews with library users, staff and key stakeholders, including deputy vice-chancellors and other leaders within the university”. One respondent stated “11 interviews with university stakeholders”, and another utilized “extensive stakeholder one-on-

one interviews with focus not on library but on stakeholder needs”.

User Experience

Although user experience (UX) and design techniques are relatively new in librarianship, there were five universities that made comments relating to its use in the strategic planning process. One “watched how they move about in the library; ask them to complete tasks and see how they do it”. Another stated that they “focus on user experience and try to frame questions from the users’ perspective, using their language, so there is not a mismatch or confusion of what you are asking them because of library jargon”. One spends time “at select points of the academic year just observing client behaviour in the libraries and interacting with library services and resources”. A respondent noted that “More recently, design thinking methodology is being deployed to explore targeted strategies such as online delivery, digital learning objects, website design and communications”.

Other Methods

It is worth noting other methods of gathering feedback from users that do not fit into a neat category. One library had an “open house” with 69 student participants. Another library has staff attend staff-student panels (organized by the student union) to identify “burning issues” and ask what would make their library service better for them. This library also runs marketing campaigns on topics such as e-books, which can also help inform the plan. One library conducted a student to student “street survey” of “non-library users” at four campus locations (although this was found to be unsuccessful: “It turns out, that group is hard to find!”). Finally, one library tried to involve student leaders in the development of their plan, with mixed success, depending on the commitment and interests of the leaders.

What Was Helpful

Identifying and understanding patron needs through consultation was certainly helpful in the strategic planning process. One respondent stated that they “wanted to use surveys to ensure our activities responded to identified needs; we used focus groups to find out what students value from our services - and which they don't notice”. One noted that “Honest feedback on where they saw that the library could add value [was helpful]; a broad view rather than a solely internal view”. The same respondent found “collecting statements which showed that we are not communicating well and not meeting needs” was also useful for planning. Another respondent found “particularly focusing on stakeholder needs [was beneficial] as the plan anticipated numerous university priorities that emerged subsequently”.

Respondents mentioned the conversations with senior executives as particularly useful, stating “The direct conversations with new senior executive staff was ... helpful in providing a sense of strategic direction and an awareness of short-term priorities”. Another remarked that “individual meetings with key decision makers (Deans, Provost, etc.) worked very well”.

What Would They Do Differently

Most comments around user engagement focused on wanting to do more of it. Usually because of tight timelines, some were not able to involve students, faculty, and others in the university community as much as they would have hoped. One noted “We definitely need to engage with our stakeholder groups more through the process, including staff, students and the community”. This was echoed in other statements, including “We did not have any students, professional staff from other service departments, or any academic staff present, and I would consider inviting representatives in the future” and “Try to engage with more stakeholders: it was difficult to convince them to

spend the time”. Timing affected some planning processes, leading one librarian to remark “Our timelines were dictated by the university; [we] would have liked to have had more time (or a different time of year) to better engage students and faculty”. Finally, one respondent encouraged libraries to “engage as broadly as possible and don't be discouraged that both positive and negative voices will come to the fore”.

Kinds of Questions Asked

Besides the method used for gaining insight into user needs, it was interesting to learn what libraries ask their users. Questions tended to fall towards user-focused (with or without library lens) (n=16 comments), library-focused (n=9 comments), trends and vision (n=6 comments), and feedback on plan (n=2 comments). User-focused questions varied: some focused on the user within the library context, and others within a more general research/needs context.

User Focus with a Library Lens:

User focused questions centre on user needs, but within the context of the library. Examples include questions like “How do you use the Library? What else could the library be doing to support your success?” (undergraduate students), “How do you use the library? How can the library assist you?” (graduate students), and “How well are we supporting your teaching and research activities?” (faculty). Other examples include “What do you expect from the Library?” and “How are you using the Library?”

User Focus without the Library Lens:

User focused questions zero in directly on users and their needs, without a focus on the library. One respondent explained that questions were about “their needs- not their needs of the library. There is a difference- and an advantage as it discourages them from answering via their perceptions of what the library can provide to them”. Another commenter stated that they

used “the Ithaka S&R faculty survey as the primary faculty input into our plan- it asks faculty about their behaviors and research and teaching habits, more than asking them about what they want in the future of the library”.

Library-Focused

Library-focused questions are different than user-focused with a library lens, focusing more on existing services than on the user specifically. These include questions like “What services are declining, increasing and what new services might we need? How will we provide these services and what roadblocks do we have to overcome?” Another library asks similar questions, including “What can we improve? What are we not doing that we could be doing? How can we better serve interdisciplinary needs and research? Finally, one respondent mentioned the following questions which are library-focused:

We target the questions to the level of staff/student being asked. However, some general questions could be- What are the top 5 things we do well? What are the top 5 things we could improve? What services should we offer that we currently don't? What would your ideal library service provide? Can you tell me about a company or department you think provides great service? Why do you think that? Other comments?

Trend and Vision

Trend and vision questions are exactly that: questions that focus on current trends and users' vision of the future. Examples include “What are the drivers for change? What are the key global, national or local trends which will impact library services over the next 5 years?”, “What do you see as future trends?” “Impacts in the last ten years. Impact of technology”, “What's our business, now and in the foreseeable future?”, “Open ended questions like ‘what should the library look like in 2020?’”

Feedback of Draft Plan

Two comments focused on getting feedback on the draft strategic plan. One comment reflects that this is the only kind of feedback received from users, asking “Mostly whether they broadly agree that the plan captures the priorities, that the context is stated accurately and whether anything is missing.” Another respondent remarked that along with other engagement with the university community, there is also “an open commenting period when we launched the draft plan.”

One respondent mentioned that the amount of feedback from the university community in response to the circulated draft was actually not helpful in the process.

Discussion

University libraries use a variety of methods to engage with their community in order to feed into the strategic planning process. Simplistically, quantitative methods answer the “what” and “how many” questions, while qualitative methods answer the “why” and the “how.” Because of time constraints, many libraries depend on quantitative methods such as regularly-generated survey data instead of leading user feedback endeavours specifically for the planning process. Surprisingly, only one library mentioned using library-produced data to help inform the strategic plan. However, this may be a result of the open-endedness of the survey. In other words, some other libraries may use library-produced data, but because the survey is based on memory, the respondents failed to mention this as part of data-gathering. Library-produced data may also be included in the “variety of activities” that were mentioned by respondents.

Using survey data to help inform the strategic plan can have the benefit of its already being available to library staff. Libraries can get the opinions of many users in a relatively quick timeframe. Responses can also be benchmarked

either with other libraries or with past surveys of the same library. However, there can be disadvantages to the survey, including low response rates and time needed to create the survey. Ethics review or survey approval may be needed at an institutional level. (Survey approval is needed at some institutions in order to avoid “over surveying” the university community.) Finally, it can be difficult to understand the context behind the data that is produced from surveys alone.

Some libraries mention the use of interviews, focus groups, and user experience techniques to help further understand quantitative findings. These approaches can provide needed context to quantitative data, allowing the opportunity for deeper analysis of issues. They can provide information on stakeholder priorities and values, and can also give libraries a sense of what users are not noticing. User experience techniques allow library staff to see what users do and not necessarily rely just on what users say. These techniques can provide very rich and deep understanding of the user. As with all qualitative techniques, time is needed to create questions, recruit participants, and deeply analyze results. Some may perceive a risk of relying on only a limited number of perspectives.

The limited number of responses made dividing user groups into students, faculty, and university administration difficult, but it appears that interviews made with high ranking university officials were helpful for those working through the strategic planning process. Whether the interviews were part of regular meetings with this group or were formed specifically for the process is unclear. Meetings between high ranking library administration and their peers within the university may help some in getting feedback for the strategic plan in a time-sensitive fashion.

Limitations

This was an exploratory study, and an open-ended survey was purposely used to gauge initial understanding of user engagement and the strategic planning process. It is limiting, however, because of the level of detail given in some responses. Responses are based on memory of personal reflections on strategic planning. It is not certain when strategic planning took place. Interviews would have given the opportunity for elaboration. A survey with fields and definitions to choose from would have also made for more clear descriptions (e.g., definition of “meeting”), but would have limited the open-endedness of responses. A combination of strategies would be helpful for future study on this topic.

Conclusion

Taking the different voices of so many in the university into account to inform the strategic plan is difficult. Combining both quantitative and qualitative methods (including the growing popularity in user experience and design techniques) can help give a fuller picture for librarians working on a strategic plan. Prioritizing those voices will be dependent on the culture of each university. What is interesting is the kinds of questions libraries are asking their users to help in their planning. Are we asking the right kinds of questions? If we are to be user-centred institutions, should our questions be user focused or library focused? Should user focused questions have a library theme attached to them? Or should we be asking user focused questions without guiding the users as to how the library should help them? Examining questions asked of users in library strategic planning papers will be the focus of future research.

This paper aims to help those tasked with strategic planning to understand how other libraries engage with the university community. The university library needs to be adaptive to the rapidly changing environment around it.

Having the university community join the conversation in how the library moves forward in this environment is an important but difficult endeavour. Setting priorities and mitigating expectations is no easy task, but one of vital importance if the library is to create a strategic plan that is meaningful for all its users in the university community.

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Appendix Survey Questions

Where is your university located?

Canada

United Kingdom

Australia

New Zealand

What is your role in the library?

Library director/University Librarian

Associate/Assistant University Librarian

Assessment Librarian

Other

Do you have a strategic plan for your library? YES/NO (If no, thank you for your help. Please go the end of the survey).

STRATEGIC PLANNING

Can you tell me about the process you used for creating your strategic plan (e.g., interviews/focus groups with library staff/users, meetings/consultations with campus partners, etc.)

What was helpful/what worked in that process?

What was not helpful/did not work in that process?

Is there anything you would do differently next time?

What kinds of questions do you ask to library staff? Are they different for different staff groups?

What kinds of questions do you ask to library user groups (e.g., undergraduate and graduate students, faculty, campus partners, etc.)

YEARLY UPDATES

Do you conduct any yearly updates/check-ins of your plan? YES/NO (If no, go to Final Comments section)

If yes, what process do you use? (e.g., interviews/focus groups with library staff/users, meetings/consultations with campus partners, etc.)

What was helpful/what worked in the yearly update/check-in process?

What was not helpful/did not work in the yearly update/check-in process?

What kinds of questions do you ask to library staff? Are they different for different staff groups?

What kinds of questions do you ask to library user groups (e.g., undergraduate and graduate students, faculty, campus partners, etc.)

FINAL COMMENTS

Do you have any words of advice for those starting a strategic planning process?

Do you have any further comments?