

Research Library Issues: A Quarterly Report from ARL, CNI, and SPARC

With this issue of *Research Library Issues* (RLI) we are introducing a new streamlined look that minimizes the amount of white space on each page and copies easily in black and white. The new look is also an opportunity to remind readers that RLI's goal is to briefly highlight issues that are strategically important to research libraries, focusing on current and emerging topics. The articles explore topics, share information, pose critical questions, and provide examples. An editor, as many of you know, is continuously on the lookout for interesting topics and the authors to write about them. In addition to your feedback about RLI's new look, please send your ideas for articles and authors to sue@arl.org.

Shirley K. Baker, recently retired as Vice Chancellor for Scholarly Resources and Dean of University Libraries, at Washington University in St. Louis, writes about the strategies for managing time that she learned over the course of her career. One of her goals in retirement is to write a book tentatively entitled, *Leadership: The Art and Craft of Making Things Happen*. Time management is a critical aspect in the life of a director. The ability to deal with the high level of demands made on a leader's time has been much discussed by management authorities like Peter Drucker. Contextualizing the topic for academic/research library leaders is of much interest. Baker's article, "Leading a Full Life: Reflections on Several Decades of Work, Family, and Accomplishment," illustrates strategies for making the most of your time with humor and personal examples.

A number of libraries are using ARL's 2030 Scenarios within their planning processes. Jennifer Church-Duran and Deborah Ludwig, from the University of Kansas, in their summary introduction, "Scenario Planning: Developing a Strategic Agenda for Organizational Alignment," speak to the importance of "navigating the complex and uncertain environments in higher education." The authors discuss the University of Kansas Libraries' planning process using the 2030 Scenarios in "Bringing Scenario Planning Home to KU." Their insights into the challenges and rewards in using the scenarios provide an in-depth view that will be useful to other libraries.

Two other libraries, Johns Hopkins University and McMaster University, have integrated the 2030 Scenarios with their balanced scorecards. In "The ARL Balanced Scorecard Initiative Meets the ARL 2030 Scenarios," the opportunity for ongoing strategic discussion and responsiveness to the changing environment is emphasized as a key reason to incorporate the 2030 Scenarios into planning processes. The McMaster University Libraries used the scenarios to test their current strategic plan, resulting in modifications to existing initiatives. The Johns Hopkins' Sheridan Libraries used the scenarios to encourage staff to think more creatively and strategically.

We hope you find helpful insights from this issue of *Research Library Issues*. We look forward to hearing your suggestions for topics for future articles.

— Sue Baughman, Editor

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Leading a Full Life: Reflections on Several Decades of Work, Family, and Accomplishment

Shirley K. Baker, Vice Chancellor for Scholarly Resources and Dean of University Libraries, Washington University in St. Louis (retired June 2012)

Author's note: Encouraged by friends and family, I am writing a book on leadership. A critical section of my draft is a reflection on work/life balance. This article is drawn from that section. To read drafts of additional stories from the book, visit my blog at <http://www.shirleykbaker.com>.

Neither my husband nor I ever wanted a life that was all work; neither wanted to marry a person who worked billable hours. Each of us loves many things—reading, dancing, and family and friends. We wanted all of those in our lives. We agreed that each of us wanted rewarding work; neither wanted to give up career goals for the sake of the other. Compromise, yes; give up, no. We developed a rough “your move/my move” strategy that took us through half a dozen job changes while moving each of us forward in our careers. Sometimes it meant moving across town, sometimes across the country. Each of us has left a job we loved for the benefit of the other.

Each of us did manage to excel in a career. And we have friends and children. It was not easy, especially when the children were young. But our children are now interesting, balanced adults and my husband and I are still married and happy more often than not. We worked hard at balance.

We paid close attention to time management. Taking on more responsibility at home or work meant being even more cognizant of managing our time. Here are some strategies that worked for us to get our work done and have lives outside work.

Managing Work Life

Choose carefully what you do yourself. For me an important insight was that I should do **first** what **only** I could do. If I could delegate the task, I did. To do this, I had to learn to share up front **what was important to me** in the final outcome. Then I could leave the **how** up to the staff member. In my first weeks as dean I was talking with the associate dean whose position was the one I had held at MIT. I was about to tell him exactly **how** I wanted something done, when I realized how badly I react to such detailed instruction. So I backed off and told him what I considered important—the rest was up to him.

One has to assume that most delegation will turn out well. To guarantee that, do give feedback on action taken—either confirming success or providing positive guidance on improving. Good staff are quick learners. And they respond to increasing and interesting responsibility.

Fight your urge to control. By delegating, you give up control of details and you generate more results. Leaders who insist on paying close attention to details don't accomplish as much as they could. In lower-level positions, you might have had time and sufficient knowledge to control most processes. As a dean or

director, you don't. Instead, express **often and publicly** what is important to you. Staff will hear and act accordingly.

Fund-raising. The first I heard from university development staff was how formidable I would appear to donors. Most donors were once college students and they remember "the dean" as a remote and powerful figure. You, of course, know that it is just you behind that title. Recognizing your power in the relationship makes it easier to be at ease and to be oneself. Being less pompous than expected is wonderfully disarming. You still have the power; you don't need to flaunt it.

While fund-raising is chief among tasks you can't delegate, you still do not have to go it alone. Enlist lieutenants. Establish a development group. Staff the group with your fund-raiser (even if he or she doesn't report to you), an events and publications person, the senior person who oversees collections, and the head of special collections. I include a rotating position in this group for a department head, coordinator, or other up-and-coming professional. If any of these people ends up as a director, he or she will have had a year of exposure to the nuts and bolts of fund-raising. This group meets regularly without me to sort through things that don't need my immediate involvement. My time is reserved for broad directions, personal insights, asks, and high-level stewardship. And, often one or more of these staff acts as my emissary—taking donors to lunch and other everyday stewardship. Every member of the group knows the library's goals and dreams and has learned how to court, encourage, and steward donors.

Use Your Own Time Well. A desire to respect other people's time can help you manage your own. Being on time for meetings and expecting others to do so is essential. Having a plan for what you want to accomplish in the meeting and sticking to it helps. Choose the right length of meeting for the topic, quietly monitor progress during the meeting, and end on time. Many people who work long hours do so because they are unable to manage this unobtrusive control or they get far more deeply "into the weeds" than is appropriate for a leader.

Making lists also helps you manage your time. Make those lists and evaluate the priority of each task so that you don't overlook a high priority while focusing on the immaterial challenge of the moment. With the list in front of you (I keep mine center-rear on my desk), it is easier to avoid getting caught up in the e-mail or text of the moment. Checking off items you've done gives you a sense of accomplishment. Save those lists for drafting self-evaluations or writing annual reports.

Focus initial energies and attention on people who will help you succeed. When you come into a new position, 20% of your new staff will support you whatever you do, a few will oppose you whatever you do, and the rest will watch to see who prevails. Focus your initial efforts on the 20% and address the resisters later. In time, you may create a tsunami that sweeps resisters along. Or makes them stand out in bold relief. That is the time to take them on.

Know your people. Recently at a staff party I was talking with several long-term employees. One mentioned coming to my office when I first arrived more than two decades ago. The second said, "Yes, I remember my meeting, too. You asked me if there was anything I needed. I told you I needed my own computer. And, I got one."

The meetings were part of my process of getting to know my 140 staff. In my early weeks, I scheduled a meeting with each—top to bottom, six to eight a week. Twenty minutes for support staff was enough to accomplish my aims but not so long as to terrify them. Thirty to forty-five minutes for mid-level staff or higher gave me a chance to get to know them. Mostly I asked the staff to tell me about themselves. “What brought you to the University and the Libraries? What do you like doing? What do you wish were different? What advice might you have for me?” And, I continue to do this for new staff at all levels within the first two months of their employment.

Be open, personal, and humane with your staff. Share things you learned and mistakes you made. Have an open door but make sure that those who want to see you with a problem have tried to resolve it with their own supervisor first. I learned as an associate director that I shouldn’t be too easily approachable by everyone. Word of what you will and will not do, what you like and dislike, passes around the library quickly. I prefer not to be called at home if the item can wait until I am back in the office. I don’t spend my workday calling home and I prefer that my home days are not made into workdays. If you have delegated well, people will not be calling you at home unless it is really **you** they need.

Occasionally go shopping for a hat. In the 1980s, when my children were young and I had a challenging job and a long commute, I occasionally took a day just for myself. Once I went into Boston and shopped for hats. I love women’s hats (I should have been a minor British royal). I spent hours trying on hats. I didn’t buy any, but that didn’t matter. I went home restored and refreshed. Do things like this for yourself, in addition to what you do for your job and your family. Make even small amounts of time for reading, exercise, or hat shopping. Consider it mental-health time, when you do nothing but exactly what **you** want. And do take your vacation; you occasionally need extended away time.

Back at work, don’t be the last person to leave the office. Your work life already includes evening and weekend events and travel. So it is important that you keep your time in the office within reasonable bounds. You will work more anyway—just not in the office. You will work in the shower, as you dress, after your children go to bed, and when you can’t sleep. If you can’t sleep, get up, write down your thoughts, and go back to bed. Having a partner who sleeps soundly is useful.

Travel

There are many positive things about traveling. Seeing your trusted colleagues from other institutions gives you a chance to compare notes on being a leader—and learn from your friends or teach them something you’ve learned. These people over time become your close friends. Long airplane flights are excellent for reading the materials for the upcoming event and for getting through the piles of articles and newsletters piling up on the corner of your desk. It is amazing how fast you can consume and discard these on a trip. But also consider rewarding yourself on the return flight with reading for pleasure (if you haven’t fallen asleep from exhaustion before the plane even takes off).

Travelling for professional meetings or development **is** a leadership responsibility. But logistics are not; minimize them. Make your travel preferences known to your assistant—window or aisle seat,

chain hotel or boutique, etc.—and let him or her handle the details. For what you must do for yourself—packing, unpacking—make lists and follow them. Make a master list of everything you need to pack (summer, winter, vacation, work) and print copies. Cross off things as you pack.

My family once left for a weekend at the beach with the crazy amount of luggage such an event requires. We had the toys, the picnic supplies, the bag of swimwear... It was only at bedtime that we realized the single suitcase with our clothes was inside the front door back in Lexington. Since then, whenever we leave home for any kind of trip, we count the number of items we are carrying—bags, coats, hats, teddy bears—and count them again at every stop.

And for work travel, create a cache of the chargers, toiletries, cosmetics, and medications you always bring and transfer them to whatever suitcase you are carrying (my kit includes a corkscrew and a magnifying mirror). When you get home from a trip, replenish those items that are running low as you unpack (and do unpack and put your suitcase away before you go to bed). Then you will face the next day back at work with minimum chaos back home.

Making Your Home Life Rich and Calm

Managing your home life well maximizes family time and gives you the peace of mind to focus on work when you are there. The quality of your relationships with those important to you is critical to your mental health. By carefully organizing the **mundane activities** in your home life, you enable calm and refreshing hours of family interaction. You don't want to be distracted from your family by disorganized hustling to feed, clothe, and house them. Managing drudgery requires discipline (but then, all success requires discipline).

For grocery shopping, make a list of all the things you often buy in the order that they are shelved in your supermarket; print copies. Aisle numbers help. (This does require one trip through your supermarket with a clipboard—hoping you don't meet anyone you know. I ran into the chancellor's wife the last time I did this.) Keep a copy of the list on your refrigerator and circle or write in items as you discover you need them. (Our son convinced his wife that creating such a shopping list was worth the initial effort! They now spend 20 minutes in the supermarket rather than the hour they used to spend.) Make menus and shop for groceries once a week, using your pre-printed shopping list as the guide. Post the menus—with recipe page numbers—on the refrigerator. Therefore, whoever is cooking knows what to defrost and what to make. He or she can switch menus around so as to cook their favorites (my husband does stir-fry, I do fish).

Wash the dishes and clean the kitchen before bed every night (another habit copied by both our children). Coming into a clean kitchen in the morning has a calming effect for all. So does doing laundry and ironing once a week; you can start Monday with all clothes in their closets or drawers, ready to wear (this is a boon for traveling, too). Encourage every able-bodied person in your household who eats food and wears clothes to share kitchen and laundry duty.

You can maximize your time if you shop for major clothes purchases for yourself and your dependents twice a year—spring and fall. This works well when children are young but less well as they grow up. Shop online whenever possible. Hire help—housecleaners, caterers for entertaining, window washers, painters, lawn-care people.

Children

Children bring richness to life as well as notable effort. Luckily, children thrive on routine. If you can retain order and predictability in your life, your children will respond well. And partners need to really share the joys, sorrows, and effort of parenting. It helps to negotiate this before you have children.

Sharing responsibility for children is easier without stereotypes about who does what. Dads can go on field trips or make cookies, but so can moms or grandparents. In dividing up responsibilities, find a way to accommodate individual parent limitations; some can handle unscheduled emergencies, others can do anything that can be put on a calendar ahead of time. And you can reduce your own anxiety about balancing parenting and work by letting your own supervisor know the flexibility you need.

Luck has a lot to do with managing family and work. Serious illnesses or disabilities make balancing work life with family life much more difficult. But, barring such exigencies, there are many ways you can ease the stress of family life. They all require discipline. Set limits—on e-mail, TV, junk food, computer games, and bedtimes—for the children **and** yourself. Our children sometimes pushed against these restraints, but now that they are grown up, they claim the limits contributed to their own success in life!

We always tried to sit down and eat dinner together every evening; you **can** get a simple home-cooked meal on the table in 25 minutes (half an hour of children's TV works wonders while you cook). And cooking simple meals (the only thing that most young children like) limits relying on unhealthy take-out and fast food. You'll probably eat a lot of broiled chicken, rice, and microwaved vegetables in the early years. But you and your partner can have some quality time in the kitchen while the children are otherwise engaged. Do work in **some** treats—wine at dinner for grown-ups, desserts and the occasional soda on weekends.

Good child care is critical. If you are in a responsible position you are more able than many to pay for good child care and elementary school "extended day" programs. When you move to a new town, tell your realtor to look for these as part of your house-hunting process. After we asked a realtor to do this for us, the firm began highlighting that as a distinctive service they provided. If you work year-round you will need to find good summer camps—day camps for young ones and sleepover camps for older children. You may have to line these up early in the New Year, when you are still exhausted from the holidays, but the effort is worth it. When your children are old enough, encourage them to get summer jobs. Working a low-level job gives your child a sense of reality, generates respect for people who work these jobs year-round, and supplies pocket money.

When one of your children is old enough to babysit for those younger, cut some deals. Pay the older one for sitting and pay the younger a smaller amount (perhaps 25% of the older one's rate) for being good. If things do not go well while you are out no one gets paid. It only happened once for us.

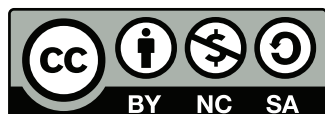
It is important to let your children be themselves. Avoid trying to relive your youth through them or force them to be what you might have wanted to be. Letting your children have some autonomy also gives them advantages. Children don't need fully scheduled lives to grow up into good and resourceful adults. Try to avoid too many sports, music lessons, or other "enrichment" activities. Children need downtime as much as adults do. Do make sure your children know the importance of traits such as honesty, hard work, and caring for others. Given this basic guidance, a little "benign neglect" encourages stronger and more independent children.

Once the children are sentient, have weekly family meetings. We came up with this ploy when I took a class in child rearing, hoping to become a calmer and better parent. The recommended meeting agenda is to start with compliments from everyone; discuss school, work, and family plans for the week; hear grievances; and hand out allowances. Finish the meeting with a treat (cookies, a game, a short trip to the museum) chosen by the chair—a position which rotates weekly among all family members. Take minutes—rotated among those who can write; these special notebooks (or online files) become your family history.

Talk about your work at the dinner table. It reduces mystery about your absence. You can communicate that frustration or occasional failure is not fatal, and you can pass on interest and skills. And, you may learn something from the questions your children ask. As your children grow, you may be surprised and pleased to see them demonstrate the skills they picked up at your dinner table.

Looking back, my husband and I feel that we have mostly accomplished what we set out to do. We have had rewarding and useful careers and our children feel confident that they can also. It was not easy but we did it.

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Scenario Planning: Developing a Strategic Agenda for Organizational Alignment

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The university provost role is without peer in the corporate world or any other sector for that matter...[the] challenge is finding the right levers for getting the academic and research enterprise to respond quickly to an emerging set of challenges—rising demands on undergraduate education, declining research funding, the challenges of globalization, and a chorus of outside voices demanding that universities demonstrate their value to students, their communities, and the nation as a whole.¹

Rapid change and university administration go hand in hand. Universities are challenged by forces of economic and social change within the context of an increasingly global learning and working environment. Research universities compete for shrinking federal funding for research, for increased funding from corporations, for top graduate students, and for ways to advance interdisciplinary efforts and multiply knowledge across institutions and sometimes across continents.

Residing within the broader context of higher education and the specific environment of their larger institutions, research libraries serve as vital players in this ever-changing landscape. As universities are called upon to demonstrate value, service, and innovation, research libraries must seize any and all opportunities to align with the university's strategic agenda. In order to plan effectively, library leadership must be able to navigate the complex and uncertain environments in higher education. "Confronting uncertainty in a rapidly changing environment is essential if research libraries are to continue to be valued and valuable contributors to the advancement of new research and the creation of new knowledge."²

To address this critical uncertainty, and to support member libraries in planning for change, the Association of Research Libraries (ARL) launched its scenario-planning project, *Envisioning Research Library Futures: A Scenario Thinking Project*, in the early spring of 2010. The project began with a **scenario building** retreat designed to create a resource for member libraries to use for enrichment in strategic planning. ARL concluded that the project should expand beyond scenario development and also include a selection of activities to assist members in learning about scenario planning and how best to use the process to support their own organizational goals. In October 2010, ARL unveiled a user's guide as a central blueprint for the application of scenario planning.

In choosing scenario planning, ARL embraced a strategic process with a substantial history and an expanding future. Used by the US military in World War II and further pioneered by the Shell Corporation in the early 1970s,³ scenario planning continues to gain momentum with higher education institutions, nonprofit groups, and research organizations. The International Council for Science (ICSU), a non-governmental and global group of national scientific bodies representing 40 countries, has recently developed a set of "foresight scenarios" based on what they believe are the primary drivers with major influence for science in coming decades for the purpose of helping member institutions explore their roles in international science.⁴

At its core, **scenario planning** is designed to help connect the dots between future possibilities and present action.

Scenario planning is a structured, disciplined technique for identifying key driving forces in the environment that have an impact on the organization and then using that information to design a series of scenarios or stories that describe possible futures. Using these stories, managers can design strategies that will help the organization reach its goal under a variety of circumstances. The stories help managers identify their own assumptions about the future and test those assumptions as they review and renew the scenarios.⁵

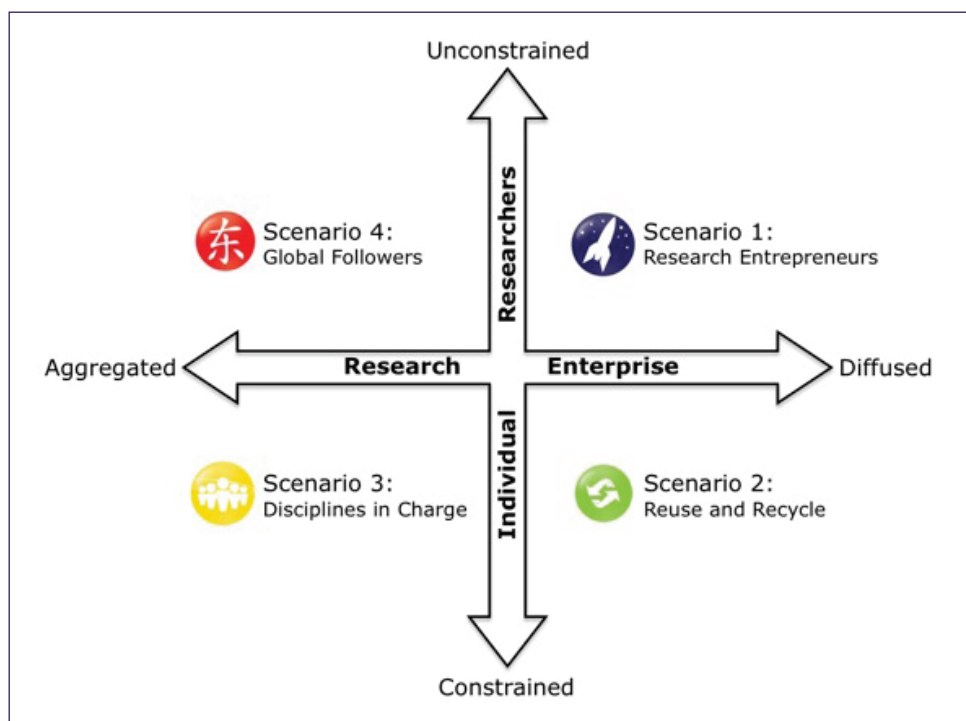
Unlike traditional strategic planning, with its focus on a single anticipated future, scenario planning provides alternative versions of that future, to be used as lenses for viewing and focusing different organizational possibilities. As a result, scenario planning is not about forecasting or making the right prediction. Instead, it is a tool to help organizations make better decisions in the face of many important uncertainties. For the ARL project, four scenarios were designed.

The ARL 2030 Scenarios are rich descriptions of four possible futures. Each presents a particular exploration of many critical uncertainties in a way that considers the dynamics that might unfold over a twenty-year time frame, as well as synergies and interactions between uncertainties. As a set, the four scenarios are designed to tell widely divergent stories to explore a broad range of possible developments over time.⁶

The four scenarios offer similarities and differences represented by their position along two axes: the state of the research enterprise and the environment in which individual researchers operate. No one scenario represents a complete picture of the future and none of the scenarios specifically mention libraries. (See Figure 1.)

- **Research Entrepreneurs**—Research is shaped by the rise of entrepreneurial research; individual researchers are the stars of the story.
- **Reuse and Recycle**—Recycling and reuse predominate in research activities. Disinvestment in the research enterprise has cut across society and government's ability to fund research and research-intensive education has become limited to non-existent.
- **Disciplines in Charge**—Computational approaches to data analysis dominate the research enterprise. Scholars, whether humanists or scientists align themselves around data stores and computational capacity that address grand challenges and large-scale research questions, often operating at a disciplinary and sub-discipline level.
- **Global Followers**—The locus of the funding that drives the research enterprise migrates from North America and developed Western nations to nations in the Middle East and Asia. These Middle Eastern and Asian cultures, which are able to build technical infrastructures that catalyze breakthrough research and attract top talent, can organize the activity into projects of relevance to their societies.

Figure 1: The ARL 2030 Scenarios



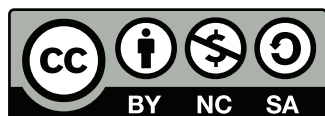
The ARL project culminated in an intensive workshop at Georgia Tech in March 2011, designed to prepare member institutions for local implementation and equip them to use the scenario set effectively. Since this time, a number of ARL libraries have engaged in discussions and activities using the ARL 2030 Scenarios. Three examples are presented in this issue of *RLI*, offering several approaches that other libraries might adapt to their own circumstances. The article about the University of Kansas (KU) experience describes the workshops held with staff to contribute to KU's current strategic planning process. Two other libraries, Johns Hopkins University and McMaster University, share how they are joining scenario planning with their balanced scorecard activities.

Another activity worth mentioning is the research project led by three 2011–2012 ARL Research Library Leadership Fellows—Jon Cawthorne (Boston College), Vivian Lewis (McMaster University), and Xuemao Wang (Emory University). They are leading conversations using the ARL 2030 Scenarios within their organizations, with other members of their Fellows class, and with ARL library directors to explore workforce transformation. If ARL libraries are to meet the needs of the 21st-century research enterprise, they will need to transform their workforce. Demographic trends—retirement of large proportions of staff, intergenerational conflict, introduction of new kinds of professionals into the workplace, and gaps in core competencies—are creating challenges for libraries. In addition, the ever-increasing global competition in the world of higher education and research calls for a new research library workforce that is agile, multicultural, and interdisciplinary.⁷

The ARL 2030 Scenarios can engage library staff in new ways of thinking about the future of the academic research library. The resources created by ARL provide a variety of frameworks for implementation that are flexible and easily adaptable to a library's environment. The challenge for libraries is determining what actions within the current environment best position the library to thrive across a majority of the future scenarios.

- 1 "University Leadership Council," Education Advisory Board, accessed July 11, 2012, <http://www.educationadvisoryboard.com/ulc.asp>.
- 2 Association of Research Libraries and Stratus, Inc., *The ARL 2030 Scenarios: A User's Guide for Research Libraries* (Washington, DC: ARL, 2010), 7, <http://www.arl.org/bm~doc/arl-2030-scenarios-users-guide.pdf>.
- 3 Joan Giesecke, "Scenario Planning and Collection Development," Faculty Publications, University of Nebraska–Lincoln Libraries, paper 65 (January 1999): 82, <http://digitalcommons.unl.edu/librarianscience/65/>.
- 4 International Council for Science, *ICSU Foresight Analysis Report 1: International Science in 2031—Exploratory Scenarios* (Paris: ICSU, 2011), <http://www.icsu.org/publications/reports-and-reviews/icsu-foresight-analysis/icsu-foresight-analysis>.
- 5 Giesecke, "Scenario Planning and Collection Development," 82.
- 6 ARL and Stratus, *ARL 2030 Scenarios*, 8.
- 7 Jon Cawthorne, Vivian Lewis, and Xuemao Wang, "Transforming the Research Library Workforce: A Scenarios Approach," slides presented at the 160th ARL Membership Meeting, Chicago, Illinois, May 4, 2012, <http://www.arl.org/bm~doc/mm12spring-scenarios.pdf>.

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Bringing Scenario Planning Home to KU

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Energized by the immersive learning process at the ARL scenario-planning workshop in March 2011, the University of Kansas (KU) Libraries decided to introduce scenario planning to library staff later that spring, to support development of a new strategic plan. From the onset, using scenario planning as an effective strategic tool required comprehensive preparation. The *ARL 2030 Scenarios User's Guide*¹ and related materials served as a valuable template, but the process necessitated adaptation for our organizational climate. Joined by a team of energized staff with organizational development and leadership interests, we prepared and conducted two workshops aimed at broad staff participation. We reaped many benefits from the process, gaining valuable insights into the purpose and practice of scenario planning. We also met with a few unexpected challenges.

Process

To kick off the project, we hosted several 90-minute brown-bag orientations for all interested library faculty and staff. For most staff, scenario planning represented an entirely new model for strategic thinking. As a result, the sessions offered a much-needed conceptual overview and the opportunity to learn more, before committing to the extensive planning workshops that followed. We were delighted at the turnout for these preliminary meetings and quickly capitalized on staff interest by offering two full workshops, one held in May and another in July, with 43 participants total.

Time was a key factor in rolling out these workshops. To balance our operational responsibilities with the opportunity for this strategic exploration, we modified the ARL proposed agenda of two full days. Instead, we developed a half-day/full-day/half-day schedule. This adaptation proved to be doubly beneficial, generating increased flexibility for attendance, while giving participants a chance to decompress overnight and return to the process refreshed the next morning.

The conversation generated during the preliminary brown-bag sessions helped set the stage for more detailed planning. The questions raised by staff illustrated both the advantages and challenges of implementing a set of scenarios that were constructed without direct engagement by local participants. The benefits were simple but substantial. In developing these narratives at the national level, ARL effectively streamlined the workflow and greatly reduced the time commitment needed for local implementation. Additionally, the resulting scenarios contained unique insights drawn from expertise across the profession and throughout higher education.

However, there were also challenges created by disconnecting **scenario building** from **scenario planning**. Constructing scenarios requires substantial intellectual engagement and a thorough analysis of trends and driving forces. It starts to frame the “outside-in” thinking at the core of scenario planning which, in turn, fosters a sense of ownership for the narratives when used in the later development of scenario strategies. In the absence of this foundational intellectual investment, KU Libraries’ participants were responding to the product of someone else’s thinking. This created a larger credibility gap—an increased questioning of the validity of the futures described and less initial conviction in responding to the scenarios.

Skillful facilitation and preparation helped bridge this gap and advanced the viability of the scenarios. At KU, we worked to build a foundation of understanding by pre-assigning staff to a specific scenario and working group and requesting that participants undertake advanced and in-depth study of the narratives. However, the most effective preparation for staff was a pre-workshop assignment to research and uncover **early indicators** that lent plausibility to each scenario. Staff explored the current literature and carried out a brief climate study, gathering evidence of future scenario characteristics already at play in today's environment. This early-indicator work brought in the driving forces and current trends that originally shaped the scenarios, generating stronger "buy-in" and closing the credibility gap. It also demonstrated the interrelated dynamics woven through the scenario set, as some indicators apply across multiple scenarios.

The KU workshops were launched by sharing the early-indicator research. The resulting conversations continued to reinforce the viability of the scenarios as planning tools. This transitioned to a "deep-dive" activity: small group exploration and analysis of the assigned scenario. The resulting analysis proved quite successful in brainstorming and developing strategies that would work well within that one possible future represented by the assigned scenario.

The last, crucial step was the more challenging: the transition from small-group, deep-dive analysis of a single scenario to the use of the scenarios as a comprehensive set. The purpose of this final stage was to identify actions that could work across all possible futures and strategically place KU Libraries in a highly flexible, adaptable position when change occurs. The outcome is a strategic agenda robust enough to align present action to a broad range of future challenges and opportunities.

As the *ARL 2030 Scenarios User's Guide* notes, a successful agenda is shaped by these key characteristics:

- **Robust**—works across a divergent and challenging set of scenarios.
- **Distinctive and Advantaged**—leverages the distinctive competencies of the organization toward achieving an advantaged position in the external research environment.
- **Inspiring**—delights the end-use customer and inspires the staff.
- **Focused**—requires strategic choices of things to do and things not to do, assessed against a realistic understanding of capabilities and resources.²

In the KU workshops, both the participants and the facilitators struggled with the development of a robust strategy. During the deep-dive process, each working group developed a rich array of possibilities to position the libraries for the potential that existed within the assigned future. This process, while incredibly valuable, tended to lock participants into thinking centered primarily on one scenario. Moving into the creation of a robust agenda required searching for points of overlap and mutual benefit that support all potential futures.

Stretching the conversation to a broader view of interlinked futures demanded substantial intellectual work. During the phase of "Identifying Robust Strategic Options," the participants in both workshops experienced confusion and uncertainty on what was being asked of them and the intended final outcomes of this stage. This frustration was increased by how differently the groups organized their content from the earlier deep-dive analysis. There was significant variance in the level of detail each

group provided for their respective scenario's strategic options and in how their input was described on the corresponding Post-its. As a result, when the larger group worked with these materials to identify broad strategic options, it was challenging to make reasonable comparisons or determine points of connections.

These challenges eventually ground efforts to a complete halt. The facilitators took this opportunity to stop the process and open up a frank discussion on what alternatives in workshop process might make more sense to the group and move us forward productively. Real-time recommendations evolved, based on the materials we had available and the needs revealed while attempting to work with these pieces. Based on all suggestions from workshop participants and facilitators, we experimented with other workflows not specifically outlined in the workshop guide. This included a question-and-answer period for groups to obtain further information from one another and use of a round-robin reporting technique.

The round-robin process was particularly effective. Prior to implementing it, each group presented a comprehensive reporting of its own robust strategic options. There was often considerable overlap of ideas across groups and it was time-consuming to hear the same information reported over and over again. With the round-robin technique, we moved quickly from group to group, each time contributing one new option that was not currently on the board. The result was a faster compilation of ideas without unnecessary duplication. Eventually, through this type of small- and large-group interaction, the attendees pulled together a set of strategies with the potential to work across the envisioned set of future possibilities.

Outcomes

When the ARL scenario-planning project was initiated, we envisioned a relatively seamless movement from scenario-planning outcomes to the development of KU Libraries' next strategic plan. The university, however, launched a comprehensive campus strategic planning process during the same time period. In an effort to align the libraries closely with the campus vision and direction, we delayed further local action after the workshops. Our goal was to delay library planning until we had a thorough knowledge and understanding KU's future directions. Fortunately, the libraries sought and achieved considerable opportunity to participate in the campus planning activities, and we were able to bring insight from the scenario project to the broader campus-wide discussion.

As a result, we did not lose the benefits of the scenario-exploration efforts while waiting for the campus plan, titled *Bold Aspirations*,³ to unfold. The **strategic thinking** associated with analyzing the scenarios, and the in-depth exploration of alternative futures, influenced our contributions to the campus plan. It also created an ideal foundation for the libraries' own strategic-planning development that would soon follow. The power of the scenario exercise existed in the transformational nature of the process, not in achievement of a final product.

When the completed KU plan was announced, the libraries chose to model their own strategic-planning efforts directly on the campus process. This included a Strategic Planning Steering Committee with broad, library-wide representation. The committee oversaw and coordinated the efforts of multiple working groups. The committee also drew heavily on the goals and strategies from the *Bold Aspirations* document, in order to shape the focus of the libraries' planning work.

Many of the scenario workshop participants subsequently served on the libraries' strategic-planning groups. As the Steering Committee began conducting an environmental scan with a detailed SWOT analysis, the earlier scenario activities appeared to have both informed thinking and enhanced our ability to de-personalize discussions about the future. Engagement with scenario-planning concepts seemed to create a mindset regarding informed decision making as a tool for adaptive foresight. This, in turn, allowed staff to consider how the future could be seen more clearly from our anchor within present reality. The influence of the scenario project was demonstrated by the surprising connections that emerged between the scenario workshop outcomes and KU Libraries' new strategic goals that form the foundation of the libraries' five-year plan, which is currently under development.

The robust agenda that emerged from our first workshops included the following strategies:

- Become an agile organization able to rapidly adapt and change.
- Develop new and diverse funding models.
- Create a culture of collaboration and partnership for a broader audience.
- Rethink and realign resources, collections & infrastructure.

Two of the thematic goals from our developing strategic plan directly reflect these workshop strategies:

- Strengthen KU Libraries' position as an agile, responsive organization capable of continual improvement and change.
- Stabilize and grow existing funding sources, secure new funding opportunities, and enhance public accountability.

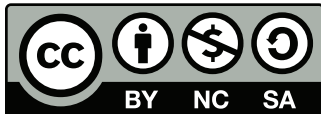
Specific actions under the robust strategies are also reflected in the current strategic planning process. The third scenario strategy, "Create a culture of collaboration and partnership for a broader audience," included activities focused on learning more about KU researchers and understanding their needs, strengthening partnerships that support research in areas such as publishing and data management and curation, and maximizing support for interdisciplinary research. All of these activities are finding their way into our current strategic planning exercise as well as into our operational work at KU Libraries today.

We invested a considerable amount of time preparing for the scenario workshops to ensure a positive outcome and that work was worthwhile. A majority of the participants rated the workshops as "excellent" or "very good." All participants responded that the balance between presentations by the workshop leaders and group discussion and activities represented a good ratio.

Overall, most participants found the workshops were effective in helping them understand the existing and future directions of KU Libraries. By shifting strategic thinking from a reactive to a proactive stance, and from an internal to an external focus, we are better equipped to deal with a future driven by regional, national, and world events beyond our control. As facilitators for the scenario workshops, we feel the time that we invested in preparing and conducting these workshops was well spent and has been instrumental in helping KU Libraries create its new strategic plan to meet the challenges ahead.

- 1 Association of Research Libraries and Stratus, Inc., *The ARL 2030 Scenarios: A User's Guide for Research Libraries* (Washington, DC: ARL, 2010), <http://www.arl.org/bm~doc/arl-2030-scenarios-users-guide.pdf>.
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- 3 University of Kansas (KU), *Bold Aspirations: The Strategic Plan for the University of Kansas, 2012–2017* (Lawrence, Kansas: KU Office of the Provost, 2011), <http://www.provost.ku.edu/planning/>.

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The ARL Balanced Scorecard Initiative Meets the ARL 2030 Scenarios

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*"As research library leaders confront turbulent times, they sorely need new tools to facilitate thinking about the future of the institution and to foster dialogue within the community."*¹

ARL has a strong commitment to both assessment and strategic planning, fostered over many years. This commitment extends to the Association's own planning activities as well as the programs and services it offers to the ARL membership. This commitment to planning is also prevalent among ARL member libraries and most are engaged in planning activities, with many using tools made available by the Association.²

The current ARL Strategic Plan 2010–2012 highlights the importance of planning and assessment. The goal to "[a]rticulate visions for the 21st-century research library and define elements for describing their value and contributions in support of research and scholarship"³ led ARL to embark on two major planning activities: balanced scorecard (BSC) and scenario planning.

Two libraries, McMaster University and Johns Hopkins University, are using the BSC and the ARL 2030 Scenarios in their planning efforts.

Balanced Scorecard

In 2009, the ARL Library Scorecard Pilot was launched to test the use of the balanced scorecard (BSC) in research libraries. The BSC is a strategic planning and performance management system created by Harvard Business School colleagues Robert Kaplan and David Norton.⁴ Martha Kyrillidou, Senior Director of ARL's Statistics and Assessment program, engaged the Ascendant Strategy Management Group to train and facilitate the use of the scorecard. Four libraries—Johns Hopkins University, McMaster University, University of Virginia, and University of Washington—volunteered to learn about and implement this planning tool.⁵ The perspectives shared by these participants have encouraged other ARL members to undertake this planning methodology. Ten ARL libraries are now participating in a second cohort for BSC implementation and some ARL libraries have independently utilized the balanced scorecard technique.⁶

The balanced scorecard implementations at the four pilot sites have been tremendously successful. As reported at recent conferences, the tool has given these research libraries a framework for **implementing** and **managing** strategy as well as a vehicle for **communicating** consistently about strategy within the organization and externally with other stakeholders. The scorecard, as originally conceived, is a tool for

measuring performance with metrics that are tied to strategic objectives, thereby enabling assessment itself to be more strategic.⁷

Even with a robust scorecard framework, organizations may still struggle with getting (and keeping) the “strategy” in their planning activities. Strategy, according to Michael Porter, also of the Harvard Business School, “means deliberately choosing a different set of activities to deliver a unique mix of value.”⁸ Forecasting or projecting the future in which specific activities will be of value was simpler in more stable times. Today we are faced with a greater number of uncertainties as we try to imagine the future and as we attempt to develop strategy. Effective organizations may find themselves using multiple tools to set and test their strategic directions. Alternative tools provide opportunities for new conversations and new lenses with which to view the organization.

Using BSC and Scenario Planning Together

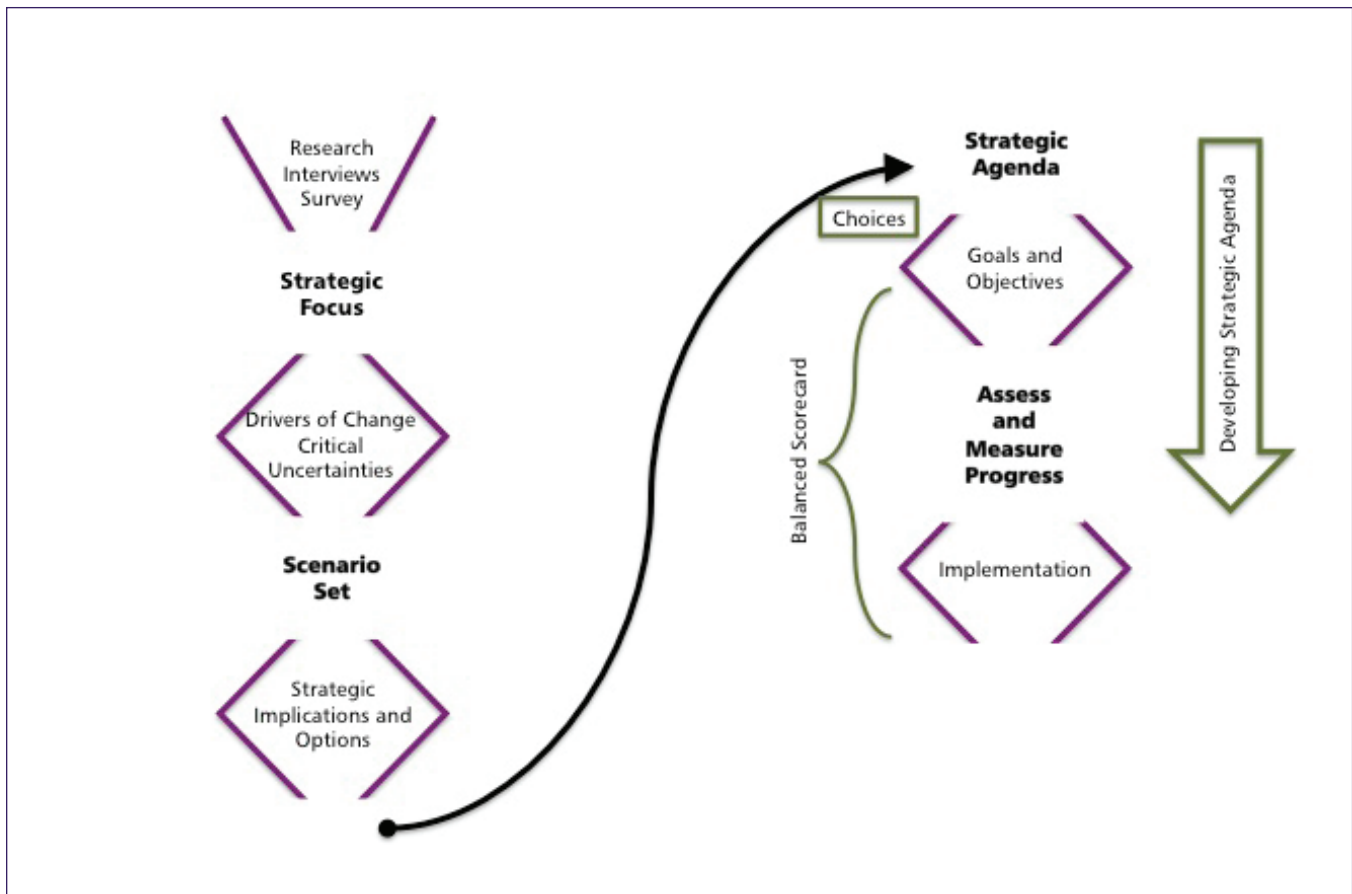
The tool of scenario planning enables an organization to **focus on uncertainty and change**, to **perceive multiple possible futures** as the context for developing strategy, and to **adapt over time to the changing environment**. Diane Searce and colleagues of the Global Business Network (GBN) stress that scenarios—a set of stories—are “hypotheses, not predictions...that capture a range of future possibilities, good and bad, expected and surprising...designed to stretch our thinking about the opportunities and threats that the future might hold, and to weigh those opportunities and threats carefully when making both short-term and long-term strategic decisions.”⁹

Scenarios are most commonly used as a tool in setting strategic direction, typically as part of strategic planning. As such, they are typically used in the early stages of an organization’s planning process or as part of a mid-course review. Scenarios are developed around a single focus, possibly a single strategic question, which is examined in light of the critical uncertainties in the external environment. The stories that result are then used by the organization to consider the strategic implications of these potential futures and to elicit strategic options for the organization that will work in each scenario. For a robust strategic-action agenda, an organization would invest in high-return/low-risk strategies that would work in multiple scenarios. The balanced scorecard can be used to articulate chosen strategic objectives, associated measures and targets, and to elicit ongoing initiatives. BSC is most commonly used as a tool for managing strategy. The complementary use of the two tools in strategic planning is illustrated in Figure 1.

In the case of the ARL libraries that have developed balanced scorecards, their strategic objectives are already established. These libraries find that the ARL 2030 Scenarios strengthen the planning process by creating a platform for an ongoing strategic conversation, by developing strategic-thinking capacity within the organization, and by ensuring that the library remains responsive to the changing environment. ARL’s BSC libraries use the 2030 Scenarios to:

- Monitor and scan the broader environment for early indicators—signals of change—and increase understanding of external forces.
- Surface assumptions about the future and develop insights into factors in the external environment to pay attention to in strategic decision making.
- Explore and discuss the implications for the organization or a specific topic in order to create advantage from uncertainty.

Figure 1: Strategic Planning through Scenarios and Balanced Scorecard (Learning Cycle)



Source: Susan Stickley, "Planning with the ARL 2030 Scenarios," slides presented at ARL Scenarios Workshop, Atlanta, 2011

McMaster: Using Scenarios to Test Current Strategic Plan

At McMaster University Library, a scenario exercise was used in summer 2011 as part of a mid-course refresh of the strategic plan, which is managed using the balanced scorecard.¹⁰ The exercise was presented as a one-day retreat for all staff in the Organizational Development division of the library. Participating staff were from Accounts, Administrative Support, Development, Human Resources, and Marketing, and represented all staff categories, i.e., librarians, management, and support staff. The scenario exercise was led by the Associate University Librarian for Organizational Development (now the Acting University Librarian) and the Director of Assessment and Accountability, who had both attended the ARL workshop on planning with scenarios in March 2011. The goal of the exercise was two-fold: to test the library's current strategic plan against the scenarios and to gather feedback on the use of scenarios as a strategic planning tool within our own organization.

The daylong exercise was presented as a compressed version of the two-day workshop developed by ARL to test an existing strategic plan or agenda.¹¹ Staff received the four scenarios in advance and were encouraged to review them prior to the retreat. As recommended by ARL, the workshop took place "off site," at the DeGroote School of Business, on the Burlington campus. The agenda for the day was ambitious and is outlined in Figure 2.

Figure 2. Agenda for McMaster University Library Planning Retreat, Summer 2011

10:00–10:20 a.m.	Welcome, Opening Remarks <ul style="list-style-type: none"> • Agenda • Desired outcomes • Review current strategic plan
10:20–11:00 a.m.	Introduction to Scenario Planning <ul style="list-style-type: none"> • Theory, background • Overview of ARL 2030 scenarios • Brief look at each scenario • Early indicators
11:00 a.m.–noon	Scenario Deep-Dive <ul style="list-style-type: none"> • What are the strategic implications for research libraries? • How does our current strategic plan (i.e., strategic initiatives) hold up?
Noon–1:00 p.m.	Lunch
1:00–2:00 p.m.	Scenario Deep-Dive (cont'd)
2:00–3:00 p.m.	Summarize key takeaways from deep-dive exercise with focus on strategic initiatives
3:00–3:15 p.m.	Break
3:15–4:00 p.m.	Debrief <ul style="list-style-type: none"> • Implications for Organizational Development unit • Feedback on the use of scenarios as a strategic planning tool

Staff found the scenarios challenging, which was understandable given their brief introduction to scenario-based planning, the short amount of time they had to familiarize themselves with the four ARL scenarios, and the wide spectrum of experience they brought with them to the table. Some of the scenarios resonated more with staff than others. For example, they could see the early indicators of the “Research Entrepreneurs” scenario already in play, and could envision what the library might look like if that scenario actually came to pass. Other scenarios did not translate so well. Participants struggled to envision what role the library would play if the “Disciplines” assumed center stage. And in each scenario it was important to remind staff that the research environment had been the strategic focus of the development of the scenario set. Staff were keen to envision the implications of each scenario for the library’s other major roles, e.g., teaching and learning. Overall, the discussions were lively and staff were intrigued by the concept of early indicators and took great delight in finding examples for each scenario. Although the workshop was compressed and fast-paced, the impact was long-lasting. For weeks after the session, staff were still identifying new indicators of the four scenarios that they encountered during their workday.

Valuable feedback on the library's existing strategic plan was received and used to modify the slate of initiatives for 2011–12. Exploring the widely different views of the future portrayed in the ARL scenario set put a new lens on the library's existing slate of strategic initiatives (e.g., digitization, marketing, assessment, and training plans). The activity put other initiatives into a larger perspective and, as a result, they were downgraded to operational projects and removed from the strategic plan. In addition, the exercise prompted suggestions for new initiatives, one of which was incorporated into the strategic plan. The new initiative, Good Ideas Incubator, hopes to capture staff ideas about new services, productivity, cost-savings measures, or revenue generation with a process for review and implementation.

The McMaster University Library intends to conduct a larger-scale scenarios exercise as part of its next strategic plan cycle. The library's current plan is scheduled to expire in 2013.

Johns Hopkins: Using the ARL Scenarios to Enhance the Planning Process

At Johns Hopkins, the Sheridan Libraries have gone through three cycles of strategic planning using the balanced scorecard. Through each cycle, changes were made trying to maintain focus on what is strategic versus what is tactical. The number of objectives and initiatives were reduced to a more manageable number for the size of the organization. However, we felt that the types of objectives and initiatives that we developed were still often more of the same old thing. After participating in the ARL scenarios workshop in March 2011, we returned to the library with a renewed enthusiasm and tools for helping our colleagues think more creatively and strategically.

With the support of Dean Winston Tabb, in September 2011 we ran our Strategic Planning Steering Committee (SPSC) through the "early indicators" exercise, followed by a deep-dive that submitted three of our BSC objectives to the rigors of each of the scenarios. The objectives were fairly broad:

- Provide and sustain the content, services, and spaces required by patrons.
- Provide responsive, effective, and integrated instructional services.
- Improve financial and IT infrastructure.

The deep-dive resulted in two robust strategies: customization and ubiquitous access. These worked across all three of the objectives. Content, services, spaces; instruction; and IT access should all have some level of customization to meet users' needs, and access to whatever we provide—instruction sessions, content, IT services—should be location agnostic.

We followed up with an all-staff scenarios exercise, which provided us with staff-driven input into the strategic agenda. We asked staff to do two exercises: (1) an early-indicator exercise where staff had to find examples of the scenarios playing out already and (2) a deep-dive into one of our current strategic objectives where staff had to determine the possible implications across each of the scenarios of one of our current objectives. Like the SPSC, staff identified a need for "boutique services," and added another robust strategy: flexibility.

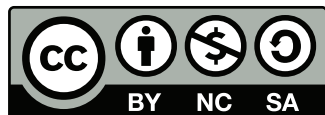
The robust strategies identified through the scenarios—customization, ubiquitous access, and flexibility—are reflected in portions of our current strategic plan, most notably an initiative that focuses

on decreasing users' frustration with access to known items. We continue to learn how to best use the scenarios and scorecard to help our organization make better decisions about the activities we pursue.

The ARL 2030 Scenarios are assisting research libraries in crafting or refining a truly strategic agenda for the future; when paired with the balanced scorecard as a strategic management system, research libraries have two powerful tools to utilize in transforming their organizations.

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- 6 The 10 university libraries participating in this second BSC cohort are: University at Buffalo, SUNY; University of Calgary; Case Western Reserve University; Emory University; Florida State University; James Madison University; New York University; University of North Texas; University of Notre Dame; and Texas Tech University. Ohio University and the University of Texas at Austin libraries developed scorecards in 2011; the University of Arizona and the University of Connecticut use a modified BSC methodology in their strategic plans.
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