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Michael Fosmire

Purdue University, fosmire@purdue.edu

Karen Croneis

Washington University

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Looking to the New Millennium: Strategic Planning for SLA Units

Michael Fosmire, Purdue University and Karen Croneis, Washington University.

Ah, the millenium, and a librarian's thoughts turn to strategic planning. As we anticipate the turning over of the year like the odometer on our cars, we naturally both remember the highlights of the last 10,000 miles and anticipate all the fun in store during the next 10,000. You can capture the enthusiasm of your unit members during this time of cosmic numerology, and do something positive and lasting for your unit by undertaking a strategic planning program.

The Physics, Astronomy, and Mathematics Division recently completed a comprehensive strategic planning process. The centerpiece of this process was a survey of our members. As members of the PAM Division Strategic Planning Committee, we want to share some tips from our experiences on how to design a useful survey, how to get people to respond to it (often the hardest part), and how to figure out what you've got once the surveys come back. We would like to thank Ruth Arnold (ruth_a@sla.org) Research Director at SLA Headquarters, for helping us with the survey process. She is available for consultation on all kinds of research projects, and has a background (a PhD in sociology) to back it up.

First, in creating a survey,

Size Does Matter

Although we could ask literally hundreds of questions, no one will fill out a 20 page questionnaire; we just don't have the time. The Strategic Planning Committee had to focus very carefully on what we wanted to get out of the survey. We needed to make sure all of the important topics were addressed without losing the interest of the respondent. Since this would be the first comprehensive survey of the Division in its 25+ years of existence, we wanted to know who we are and what we do as individuals, as well as how we perceive and what we find of value in the Division. Since, even pared down to its barest essentials, it required a fairly lengthy survey, we grouped questions by type (individual, division, planning) to break up the survey into manageable chunks of between 5 and 10 questions in each section. Sprinkling encouraging statements ("Half way there", "Only one more page") also helped to keep respondents going.

What do we want to know?

As stated earlier, this was our first survey effort of our members. Thus, we wanted to know everything. We concentrated on: who we are professionally, what we do in SLA and the division, and what we want out of the division.

Starting from the top, who are we? How many students, full-time, part-time, retired, self-employed people belong to our division? What kind of libraries do we work in, and what do we do there? Are we new or old to the profession (and the division)? The answers to these questions help us understand whether we should pitch our programs and services toward particular demographic groups, or combinations thereof. We can make fact-based decisions on whether to sponsor or co-sponsor programs on non-subject specific topics, such as management or supervision.

After getting a handle on individual professional characteristics, we moved on to our members' involvement in the division. How many of us have served on committees, led program sessions, been division officers, or provided other services for the division? Are we active in other divisions or other units, and do we go to the Annual Conference and why or why not?

We then asked about services the division provides, both an evaluation of our standard conference programs (roundtables, business meetings, open houses), and also our non-conference services, such as our

electronic discussion list, website, and bulletin. We finished with a solicitation of perceptions of the biggest challenges we face and suggestions of how the division can help them to meet those challenges.

Variety is the Spice of Surveys

We wanted to maximize the number of responses within each survey. Thus, we included ranking, multiple choice, and free response questions, to solicit input from people most comfortable in responding in different formats. The multiple choice and ranking questions let the respondent compare structured possibilities on absolute and relative scales (and allowed for greater statistics), while the free responses used the collective abilities of the organization to brainstorm possible future programming, current needs, etc. We included write-in options for as many questions as possible to allow for innovative answers and tried to give enough multiple choice options that everyone could check *something*, to let us know they at least considered the question.

Hype it Up!

A well designed survey doesn't do much good if no one responds to it. So, in order to assure maximum response, we promoted the survey extensively on our division's electronic discussion list. Since our list is very active (and the highest rated service of the division), the message reached the vast majority of our members in an effective way. We also posted an e-mail version of the survey to our discussion list so our more virtually oriented members could dispense with paper altogether. We sent several reminders to the list, and included pleas in our division newsletter, our other mass means of communicating with our constituency, stressing the importance of the survey in the planning process.

We gave members three weeks to respond to the survey. This short turnaround time tried to instill a sense of urgency in members to fill it out. If the deadline is too far away, the surveys have a bigger chance of getting put on a pile of things to do, never to reappear. Even with this short turn around time, we didn't just send 'em and forget 'em. Rather, we kept the idea in the forefront of their minds by frequent reminders, so, when they finally did have a spare moment in their work, the survey could pop up as an option to fill the vacuum. ***How did we get people additional copies of the survey if they lost theirs? Did you have it posted on a website or did you include it in reminder emails? I thought another sentence about that would work here***

Once the deadline passed, we didn't stop pestering our members. Reminders continued for a month after the ostensible deadline, adding a greater level of urgency to respondents, since they already saw they were overdue in returning their surveys.

This relentless approach worked! Survey response rates can easily languish in the 30-50% range, but we received responses from 70% of our membership, and even spurred 12 non-members (who read our electronic discussion list) to respond. We sent out the original surveys through the mail with self-addressed, stamped envelopes, and that is still the method of choice for respondents. Over 60% of responses came back in the mail, with about 30% arriving by email, and the rest by fax. Thus, it pays to keep open a variety of response mechanisms for members with different preferences for communication.

Figuring out What We Got

We undertook two valuable labor intensive projects to analyze the data. The first was to group the free responses into general categories. This served to turn a few hundred disparate ideas into a half-dozen major concepts that we could further analyze. We reported both the grouped data and the actual responses to provide the most information to our members. After we coded all the questions, we entered them into a database. This allowed for easy cross-indexing of the answers. Are the P, A, or M of PAM less happy than the other letters? How does conference attendance, time in the division, or type of library affect

involvement in/happiness with the division? All of these questions are accessible (and easily retrieved), once the data is input.

We also gave our members the opportunity to respond to the results of the survey, again to increase the brainpower that was focused on the project. We posted the (composite) results to the web where anyone with interest could browse, draw their own conclusions, and share them with the Strategic Planning Committee. We also allowed all our membership to respond to our final strategic plan and survey evaluation by placing them on the web as well. That way we received the maximum input before the Annual Conference, when the plan and evaluation were officially adopted. This both empowers our members in the process of charting the future of the division, and it increases the brainpower directed toward finding answers and solutions to the questions and problems raised by the survey.

What Does It All Mean—And What Do We Do Next?

The full results of our survey are available at (<http://bama.ua.edu/~kcroneis/pamrslt.html>), with a list of the highlights at (<http://bama.ua.edu/~kcroneis/pamkey.html>). We wanted to share some of our more generally applicable results, and items we found that you might want to investigate in your unit.

First, we found some pretty encouraging results. Our electronic discussion list was, by far, the highest rated service we provide to our members (and anyone else who wants to join). It certainly binds us together during the fifty-one weeks of the year we are not at the conference, and it is one of the few means of interaction for those members that do not attend the annual conference. Also, approximately half of our respondents have had an active involvement in the division, as roundtable organizers, committee members, officers, web site developer, etc. Our programs at the Annual Conference were rated highly by our members, and 80% of respondents did attend at least one conference within the last three years.

But, with any group, there will be people with different interests. We cross-indexed all of our individual characteristics against involvement, services appraisals, and needs assessments. We found no subject specialty dependence on members' attitudes, satisfaction, or perceived needs, perhaps in part because many members are responsible for two or more subjects in their libraries. We did, however, find a few groups of members that did have significantly different needs than the group as a whole.

New members: Members new to the profession (but not experienced librarians new to SLA) expressed less satisfaction with the conference programming, especially social/networking events like open houses. They also are not active in the division (involved in committees, conference programming, officers, etc.) at a rate commensurate with their time in the division.

Non-academic Librarians: As a division, we know that our membership has a large academic component. The survey found a 2:1 ratio of academic to non-academic librarians. The non-academic librarians seem to find the programming a little less satisfying than their academic counterparts. They are also less active in the division though.

Annual Conference Attendance: As one might expect, those that attend the conference more regularly are generally more active than their counterparts (although satisfaction with conference programming was unchanged across these groups).

From these breakdowns of the survey data, we see a challenge that is probably not unique to our division. How do we develop the newer librarians and non-academic librarians (read here, minority types of libraries or types of librarians within a unit), involving them more and making it easier for them to take more active roles in the division?

So, Go On, Get Out There and Do It

The intense internal scrutiny of our division through the strategic planning process has already helped our division immensely. We found some services that could be improved and have already included new features our members thought were important. The cumulative brainstorming session of the survey yielded several ideas for future conference programming, alternative programming options, and mechanisms to involve people in the division even more than they currently are.

The self-evaluation process has truly energized the division and sparked our members to think how we can do things better. With a strategic plan in hand, our committees and Board can now evaluate new proposals (and their current activities) and see if they are addressing a demonstrated need. The enthusiasm is coursing through our division as we look forward to the next 1000 years of the division and all the excitement it will bring.

So, go on, get out there and do it. You'll be happy you did.