James White Library's strategic plan development process: an innovative approach

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James White Library’s Strategic Plan Development Process: An Innovative Approach

The objective of this presentation is to describe the process adopted by James White Library to develop and implement its Strategic Plan for the period 2014–2017.

**Strategic Planning Concept**
The main intent of a strategic plan is to align the core mission of the library with the mission of the larger organization, taking in consideration its external and internal environments — social, economic, educational, demographic, cultural — and also the organizational strengths and weaknesses. It is an incomparable cost-efficient tool that is to a large part the organization to take maximum advantage of its resources to accomplish its mission.

**JWL’s Strategic Planning Process**
Although a Strategic Planning Committee was formed to manage the process and make the final decisions, the process required the participation and involvement of the library’s staff as a whole. The Committee consisted of 18 members, 12 chosen by library staff and six by the Board of Trustees.

The process consisted of six phases and ten steps:

**Phase 1: Establishing the Strategic Plan’s Philosophical Underpinnings**
- Align the library’s future with the University’s Academic Commons educational philosophy
- Position JWL as a partner of the university’s educational endeavor

**Phase 2: Assessment of the Previous Strategic Plan**
- Review and evaluation of Mission, Vision, and Values
- Review of the SWOT analysis
- Review and evaluation of the previous goals and objectives to identify to what extent they were accomplished

**Phase 3: External Environment Scanning**
- Examination of: National and Local Economics, Higher Education Trends, Specialties, etc.
- Gathering of the library’s Departmental feedback
- Review of the library’s "Y" and "X" generations, Graduate Studies Priorities, were presented by key university administrators and academics.

**Phase 4: Internal Environment Scanning**
- Examination of: Student Environment Scanning, Library Personnel Data Tabulation and Analysis
- Follow-up questions depending on: (a) If they answered with information related to the library or info literacy at all; (b) If they did not mention the library.

**Phase 5: Student Environment Scanning**
- Identification of patrons’ needs and satisfaction test

**Phase 6: All Academic Environment Scanning**
- Examination of: the library’s history, the goals of the university, what is the library’s role, what is the library’s mission, and how does the library fit into the academic mission?
- Examination of: who the library serves, and how the library can change its focus and strategy to align with the "Y" and "X" generations and the library.

**Phase 7: Identification of Library Trends**
- Examination of: the library’s history, the goals of the university, what is the library’s role, and how does the library fit into the academic mission?
- Examination of: who the library serves, and how the library can change its focus and strategy to align with the "Y" and "X" generations and the library.

**Phase 8: Data Tabulation and Analysis**
- Reviewing and Analysis of all items entered in Phase 2
- Examination of: how all the information gathered impacts the library’s mission, services, and education
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- Examination of: how all the information gathered impacts the library’s mission, services, and education

**Phase 9: Writing the Plan**
- Determination of the Mission, Vision, and Values
- Determination of the current state of the library
- Determination of the library’s mission, vision, and values
- Determination of long-term goals, measurable objectives, and specific strategic actions

**Phase 10: Protecting the Plan**
- Development of the 2014-2017 Strategic Plan brochure
- Presentation of the brochure to the library’s community

**Phase 11: Revising the Plan**
- Evaluation of: progress and performance on an yearly basis
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- Development of: strategic directions which were aligned with goals and objectives
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**Phase 12: Submitting the Plan**
- Submission of the final plan to the library’s community
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