

# *Trends*

IN LAW LIBRARY MANAGEMENT AND TECHNOLOGY

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*Edited by Philip C. Berwick ♦ For academic, firm, corporate, and government law librarians*

## **Planning for the 21st Century: Creating a Strategic Plan at the Yale Law Library**

### **Part 2: Writing the Plan**

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“**E**very visitor to the library should be greeted with a smile,” one committee member said early in the writing process. The story of how this closed-door statement addressing a specific problem turned into a library-wide debate over the appropriateness of a smiley-face emoticon is emblematic of the sharing, openness and honesty the Strategic Planning Committee brought to the process.

This article is the second of a two-part series about the strategic planning process, from creating the committee to signing off on the plan, at the Lillian Goldman Law Library at Yale Law School. Part I described our research and

information gathering strategies that formed the basis of our plan; Part 2 discusses the writing of the plan.

### **Write and Re-write**

Before beginning to write, we agreed the strategic plan would be short, easy to read, understandable, and most importantly, implementable by the librarians. We also wanted to involve our colleagues at every stage of the writing process.

We began by identifying some of the most important challenges raised in our environmental scan and addressing them one by one. For example, some students did not feel welcome by the staff stationed at our two library entrances. "Every visitor to the library should be greeted with a smile," one committee member suggested as a remedy. Another added the smiley face emoticon :-)) to our draft. Little did we know the stir this emoticon would cause!

We ran into controversy right away with our proposed vision. According to the definitions we collected in the literature, the vision is something for which an organization strives to achieve. We wanted the vision to be short, memorable and relevant to the work of every employee. After reviewing many vision statements, we were inspired by the former mission statement of the Walt Disney Company: "Make People Happy."<sup>1</sup>

We wanted ourselves and our colleagues to be able to summon the vision by memory, automatically, with every decision. We realized it was lofty, but it is supposed to be: "To be the best academic law library in the world." When we took the Committee's vision to a meeting of the professional library staff, we were met with significant resistance. Some thought the vision was arrogant; several suggested softening it with perfunctory language such as, "*We strive* to be the best academic law library in the world."

During this initial meeting with the professional library staff we sought comment, criticism and opinion on a draft of the vision, mission, guiding principles, goals and strategies. We wrote each element of the draft plan on large poster-size sheets of paper, one goal per page, and hung the sheets on the walls around a large seminar room. We offered our colleagues colored markers to write

ideas and thoughts on the sheets, which they did enthusiastically.<sup>2</sup> After a short break, we discussed and debated the comments and ideas put forth by our colleagues. When the meeting ended, the Committee took our colleagues' opinions and comments back to the meeting room and incorporated most of them into the current plan. We went through this process twice. The second time, the Committee excused themselves from the meeting room to encourage even more open participation.<sup>3</sup>

Committee members also met with librarians and colleagues individually. This helped ensure we would generate feedback that might not have been shared in these larger group settings.

It was through all these meetings that many of the principles and goals were refined. For example, "Every visitor should be greeted with a smile :-)," became "Make every patron feel welcome :-)" While much rewriting occurred (seven drafts in all), after the second meeting of professional librarians where more debate and discussion flowed, all of our colleagues agreed to the vision as we initially created it, "To be the best academic law library in the world." Although a few said they did not particularly like the vision, everyone accepted it, bar none.

## **Dangerous Ideas**

During the writing of the plan, we wanted to encourage librarians to think creatively and outside-the-box about the library. To this end, we asked our colleagues for their *dangerous ideas*<sup>4</sup> and prompted each colleague to formulate an answer to the dangerous idea as it applied to law libraries. The librarians sent their answers to only one committee member, Jason Eiseman, and we allowed anonymity.

During our April 2010 monthly librarian meeting we read the *dangerous ideas* and openly discussed them. Ideas ranged from allowing food in the library, to asking students to generate website content, to arranging our print collection by size. While some ideas were capable of implementation and others were clearly impractical, the discussion generated creative ideas and gave the Committee a great sense of what other librarians were thinking about for the future.<sup>5</sup>

### **The Final Plan**

Seven months after initially receiving a charge, followed by scanning the environment, surveying employees and patrons, digesting results, writing drafts, presenting drafts to our colleagues, synthesizing feedback, and rewriting more drafts, we finally completed our plan in early June 2010, right on schedule. Our final plan consists of a vision, mission, guiding principles, goals and objectives; it is a public document posted on our website. Our final plan also contains an appendix with suggested departmental goals and strategies based on specific results gleaned from the environmental scan and surveys. The Committee's work was finally done except for one contentious point: to include or not to include the :- ) emoticon.

The library was evenly divided. The final decision was left to the Committee. To find out whether we kept it or not, visit our plan here: <http://library.law.yale.edu/about/strategic-plan-2010-2015>.

Finally, the Strategic Planning Committee delivered the law library's 2010–2015 strategic plan in a formal ceremony to our director, Blair Kauffman. The plan was printed on parchment, rolled, and tied with a blue silk ribbon. It was a memorable occasion for the Committee and cheered by the entire library; for this was not only the Committee's strategic plan, it was the plan that the entire library staff had a significant role in developing, influencing and writing.

### **Lessons Learned**

#### ***Lesson: It's OK to argue***

Passions run high; they should. These are important decisions. We are discussing people's work and careers as well as departmental budgets. It is important to remember, however, that we are all professionals and working toward a common goal. We all want the library to be the best in every way including having a strong, relevant, ambitious strategic plan.

#### ***Lesson: There is no perfect plan***

No strategic plan is perfect and we were not seeking to create a perfect plan. Rather, we strived to create a plan that was tangible, workable and, most impor-

tantly, one in which our colleagues could see their work reflected and progress made. We wanted the plan to be memorable, easy to understand and viable.

***Lesson: If everyone is happy with every aspect of your plan then it may not be ambitious enough***

We were fortunate to discover early in the process how important it is to give everyone a voice in the creation of the strategic plan. It is also important that every employee and staff member be on board with the strategic plan. But we also quickly realized when we presented the vision to our colleagues that we would never achieve 100% satisfaction with 100% of the plan. In fact, if you achieve that level of satisfaction then your plan may not be sufficiently ambitious, challenging and rigorous.

It was important to the Committee that each employee embraces the plan even if each comment or suggestion was not accepted and integrated into the plan. Our colleagues knew that we listened, reflected and considered each and every comment, suggestion and idea while finalizing the plan.

## **One Year Later**

This past summer the professional library staff reconvened for a Strategic Plan Update meeting with the purpose of updating one another on the goals each department had completed and the goals each department was planning to work on in the future. We hoped that departments were following the strategic plan and considering it when making decisions about what work to complete and on what timeline. We also hoped each department had not completed all the goals and tasks relevant to its work, thus rendering the plan obsolete. Fortunately that wasn't the case.

During the course of the meeting, we proceeded line-by-line through the strategic plan. We discovered that each department had reviewed the plan, including the appendix, and was able to report the status of specific goals, objectives, strategies and tasks.

At the end of the meeting, one librarian requested we do this again next summer. "I learned so much about what my colleagues are doing in the library.

## *Trends*

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This was really terrific.”

We will :-)

## Notes

1. Daniel W. Rasmus, Defining Your Company's Vision, Fast Company (Feb. 28, 2012, 2:02 PM), <http://www.fastcompany.com/1821021/defining-your-companys-vision>.

2. Teresa Miguel wishes to acknowledge and thank Laura Bender and colleagues at the University of Arizona Library who taught her this method of including colleagues in the strategic planning process.

3. We are not sure if this was necessary, but we didn't want anyone to feel inhibited by our presence. We made clear that we would not be personally offended or put-off by any comment, but rather, this was an opportunity to be heard in the process.

4. "Dangerous Ideas" is based on the Edge Question Center, <http://www.edge.org/questioncenter.html>. Every year the Edge Foundation asks an open-ended question about the world, and various thinkers, scientists, engineers and artists answer the question. In 2006 the question was "What is your dangerous idea?"

5. The session was so popular that librarians requested we have meetings like this periodically to keep fresh ideas flowing in our library. We did; these meetings continue today and are called SLAM DUNK (Super Librarians Advancing our Mission to Decipher, Understand, and Negotiate Knowledge).

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