So We Have a Strategic Plan...What Now?

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Member, OPAL Strategic Planning & Implementation Committee
Member, Marketing & Communication Working Group

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Ex Officio, OPAL Strategic Planning & Implementation Committee  
Member, Marketing & Communication Working Group

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Director, Beeghly Library, Heidelberg University  
Secretary, Marketing & Communication Working Group
Strategic Planning Committee

2017 Planning Committee Members:
- Leslie Jankowski, Chair (CCAD)
- LuAnn Boris (Walsh)
- Michael Butler (OhioNET)
- Laura D’Amato (Baldwin Wallace)
- Noreen Mulcahy (Mount Carmel)
- Andrew Whitis (Findlay)

2018 Planning Committee Members:
- Andrew Whitis, Chair (Findlay)
- Michael Butler (OhioNET)
- Laura D’Amato (Baldwin Wallace)
- Leslie Jankowski (CCAD)
- Tiffany Lipstreu (Otterbein)
- Christine Morris (OhioNET)
- Noreen Mulcahy (Mount Carmel)

2019 Planning Committee Members:
- Tiffany Lipstreu, Chair (Otterbein)
- Laura D’Amato (Baldwin Wallace)
- Michael Dziabiak (Findlay)
- Leslie Jankowski (CCAD)
- Beverly Lane (Pontifical College Josephinum)
- Christine Morris (OhioNET)
How do I find the Strategic Plan?

https://opal-libraries.org/directors-council/strategicplanning
Directors' Council

Governance

Home  Working Groups  Meeting Documents  Strategic Planning

Strategic Planning

OPAL Strategic Plan Tracking Chart
The version of this document is currently a working draft by the OPAL Strategic Planning Committee and Executive Committee. If you or your committee need editing privileges, please contact either the SPC or EC to request access.

OPAL Project List 2017-2020
Editable list of projects, descriptions, and assignments
Submit a Project Idea

The project idea form includes a link to the current OPAL Project List (non-editable access) and asks contributors to check the list first to see if their idea has already been submitted.

Current Strategic Plan

Strategic Plan 2017-2020
Guiding principles, goals and objectives.

Archived Strategic Planning Documents

Strategic Plans and Planning
Strategic plans and previous planning task force documents from 2008-present.
Overview: the OPAL Strategic Plan

**OPAL Mission**
To strengthen and promote member libraries through financially responsible collaboration and innovation.

**OPAL Vision**
Together, OPAL will explore solutions to deliver resources and provide expertise to our communities.
Strategic Planning

Our Guiding Principles

• We believe clear communication is important to our success.
• We believe collaboration creates a strong foundation for our work, services and resources.
• We believe investing in our future ensures long-term relevancy to our communities.
Strategic Planning

- **Goal 1: Foster open communication and knowledge sharing.**
  - Implement efficient procedures to maximize collaboration.
  - Use a consent agenda; share action items with OhioNET directors.
  - Gather expertise from diverse sources.
  - Refine DC Working Groups and COIs; find ways to engage with all private academic libraries.
  - Improve information flow with all stakeholders.
  - Share knowledge with all OPAL membership.
  - Document the history of OPAL.
  - Establish an OPAL archive.
Strategic Planning

- **Goal 2: Empower library staff to affect change.**
  - Provide opportunities for staff at all levels to engage with OPAL.
  - Support leadership and professional development (Library Leadership Ohio & ICOLC)
  - Identify routine tasks related to the LMS in order to increase consortial efficiencies.
  - Educate staff about OPAC tips; explore deep collaboration
Strategic Planning

• **Goal 3: Invest in our future.**
  • Respond to emerging trends and issues that affect private academic libraries.
    • Leverage OPAL staff to identify issues; use OPAL structure to find solutions; develop digital collections (CONTENTdm)
  • Refine the mentoring program.
    • OTM coordinator
  • Actively investigate the future of the shared Library Management System.
    • Meet with OhioLINK leadership
  • Engage with the Association of Independent Colleges and Universities to advocate on our behalf.
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**Current Strategic Plan**

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Ohio Private Academic Libraries Strategic Plan (2017-2020): Long Term Strategic Objectives and Goals

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Goal 1: Foster open communication and knowledge sharing

| Strategy: Implement efficient procedures to maximize collaboration |
|---|---|---|---|---|
| **Tactics** | **Time Frame** | **Metrics** | **Purview** | **Progress-To-Date** |
| 1. Use a consent agenda at Directors' Council (DC) (and other meetings as applicable) to shift focus to an action-oriented meeting | Each Academic Year. There are 4 DC meetings a year. | SPC recommends: Metric: 1. Minutes from DC meeting are posted 2. Meeting minutes include consent agenda. | EC secretary: take DC meeting notes, which should record if a consent agenda was used. EC President: update the EC and/or DC meeting notes, verifying that consent agenda material is included. | |
| 2. Action items are shared with OhioNET Executive Director/CEO, Deputy Director, Director of Administrative Services, and Director of Technology Services | Each Academic Year | SPC recommends: All action items from the EC and DC meeting notes of the current meeting minutes are put on the agenda of the next EC/DC meeting (as appropriate) - this would include items from the CCN reports. How many action items from the DC meetings were followed up on? | EC secretary: takes EC and DC meeting notes, which include the status of past meetings action items for progress review in their meeting, and should capture the new action items that derive from these meetings. EC Chair: updates the EC/DC meeting notes, at | |
OPAL Feedback Activity

TRENDS THAT EXCITE YOU:

Ohio Private Academic Libraries
New Roles in OPAL

- **Goal 3: Invest in our future.**
  - Refine the mentoring program.

+ OTM Coordinator (Onboarding, Training, and Mentoring)
  - 2018 survey revealed the need of OPAL members for help beyond one-on-one mentoring.
  - The new focus will be on introducing new people to OPAL and helping current members with new roles and responsibilities.
New Roles in OPAL

+ COI Liaison
  • 2018 survey revealed the most successful COIs were the most structured “legacy” groups: Cataloging, Circulation, & User Services
  • Survey recommendations included:
    • Create more documented structure for creation and maintenance
    • Common meeting templates for notes
    • Expectation of activity or automatic dissolution
    • Sharing COI updates on OSHARE
    • Require annual reports to COI Liaison
    • Develop the original COI concept document into a more robust COI Handbook
    • Update the OPAL Organization Manual
New Roles in OPAL

+ Working Groups
  • Where did they come from?
  • What is their general purpose?
  • What do they do?
    • Assessment
    • Marketing & Communications
    • Outreach
    • Shared Expertise
  • What does it mean to me?
Strategic Plan is Live on the OPAL Website:

Strategic Planning

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An “Agency of Special Projects” based in Columbus, Ohio.

Assisted with Otterbein University Library’s and OhioNET’s strategic planning.

Photo from Instagram @treetreeagency
Value Proposition Work

Phase 1: September 2017 – February 2018

Deliverables:
• Key observations and strategic recommendations presentation
• Key messaging
• Messaging kit
  • Brand Manifesto
  • Elevator Speech
  • OPAL video with testimonials made at 2018 conference

Available to all OPAL members via the OPAL Website (http://opal-libraries.org/brand-identity).
Brand Identity

Deliverables from treetree

**Phase I**
- Key Messaging Framework
- Elevator Speech/Brand Manifesto
- Key Findings & Recommendations

**Phase II**
Value Proposition Work

Phase 2: March 2018 – December 2018

Deliverables:
• Pocket Card
• Website Copy
• PowerPoint/Webinar for all OPAL members
• Impact Report was distributed and is available in several places on the OPAL website (http://www.opal-libraries.org/about)
OPAL is a tight-knit group of not-for-profit, private, academic libraries locking arms to better serve our students, staff and faculty.

OPAL’s collective voice within OhioNET not only gives us access to OhioLINK, but also to staffing and technology support and to other like-minded professionals. We know that small libraries are constantly being asked to go further with less, so we deliver the confidence to achieve more and the community to share it with.

OPAL is a community of like-minded thinkers and all-out doers.

- We commit every tool at our fingertips—and then some—to bringing the best services and resources to our users.
- We are one of a kind and, with that in mind, we are powerful. Like our institutions, we use the influence of many to propel us to achieve more.
- OPAL gives our tight-knit group of not-for-profit, private, academic libraries the tools to do more, achieve more and help more for the students, staff and faculty we serve.
Value Proposition Work

• Impact Report
  • Positive feedback, especially the Executive Summary pull-out
  • Next Impact Report out between Fall 2021 and Spring 2022

• “How has OPAL positively impacted...” survey being conducted today

• Feedback on current Impact Report
  • Under consideration by the Marketing and Communication, and the Assessment Working Groups
We need to hear YOUR thoughts

1. Strategic Plan | Project ideas
   • Submit your postcard
   • Submit Project ideas

2. Impact Report
   • Director’s interviews
   • Potential survey
Thank you!