

**Developing a Strategic Plan for the Library of Congress Part 2 - Strategic Goals,
Assessments, and Annotated Bibliography**

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Abstract

This is the second part of a two-part strategic plan for the Library of Congress. Four goals were developed based on the findings from part one (the environmental scan and SWOT analysis) and in line with the mission, vision, and values of the organization. The goals are centered, are increasing awareness of the Library's offerings, increasing access to Library offerings, connecting with Library users, and providing opportunities to encourage lifelong learning. Each goal is accompanied by objectives with thorough action plans and methods of assessment. This plan covers fiscal years 2021 through 2025. An annotated bibliography of resources utilized during the literature review on environmental scanning and goal development stages of this project is included.

Keywords: Library of Congress, information organizations, strategic plan, library access

Developing a Strategic Plan for the Library of Congress Part 2 - Strategic Goals, Assessments, and Annotated Bibliography

The Library of Congress is working to become a world cultural institution that inspires lifelong learning and community engagement among all users. A set of goals was developed based on data gathered during an environmental scan and SWOT analysis in part one to support the Library's mission and vision. These goals draw on the values outlined in part one to ensure they accurately reflect the organization. To achieve these goals, specific objectives and action plans were developed to guide progress on each goal. These objectives include creating digital and physical exhibition spaces, reducing the backlog of materials waiting to be digitized, developing a marketing plan to connect users with Library offerings, and establishing outreach programs in conjunction with other organizations. An annotated bibliography focused on environmental scanning follows the strategic plan. One key finding from reviewing the literature on environmental scanning was the need to involve the community in planning and daily operations. This shared ownership empowers library users and staff to work towards achieving the goals in the strategic plan.

Library of Congress Strategic Plan 2021-2025

The Library of Congress's vision is to be a world cultural institution. By focusing on raising awareness of the collections, increasing access to all offerings, and engaging users through multiple mediums, the Library will be able to achieve this vision and support lifelong learning. By focusing on adhering to the established mission, vision, and values, the Library will increase its value in the lives of its users and present itself as a world leading institution.

Goal 1: Raise awareness about the Library's notable collection and the meaningful value it has worldwide.

Objective 1.1: *Create physical and digital exhibition spaces to highlight materials.*

Action Plan: The Library will create physical and digital exhibition spaces to showcase materials. Exhibitions are organized displays of books and other related materials about specific topics or themes. A specific web page will be created in order to highlight a different part of the collection on a bi-monthly basis. An interactive element will be included on the web page in order to encourage the patron to learn more or test what they learned from the digital exhibition. These interactive elements can include “test your knowledge” quizzes, puzzles, surveys or other creative activities in both digital and physical versions. The digital exhibition will be a supplement to the physical exhibition and delve further into the theme of the exhibitions. Exhibitions will include audio, video, text, and when applicable, small models. The interactive elements found on the web page will also be available for the duration of the physical exhibition, as on-site touch screen kiosks. This will make visitors more aware of digital exhibitions and also help promote the Library’s website.

Assessment: Physical exhibitions will be evaluated based on attendance numbers, level of engagement (determined by the amount of time spent in the exhibition and feedback from visitors), and impact on visitors (as gathered from visitor surveys). Digital exhibition spaces will be evaluated on visitor metrics and level of engagement (commenting, liking, sharing, etc.). The interactive elements will provide additional data points for determining engagement and will be monitored to ensure they are engaging visitors. If not, the interactive elements will be revisited throughout the exhibition and for future exhibitions and will be updated or improved upon.

Objective 1.2: *Promote the Library’s offerings through social media and international organizations, including the World Digital Library and the International Federation of Library Associations.*

Action Plan: The Library will promote the Library's collections, encourage patrons to interact and ask questions, and strive to create a more diverse audience through the use of various social media platforms. Social media sites will be used to advertise the current collection being displayed at the physical exhibition and on the digital exhibition website. For example, the Library could do a Livestream Q&A or suggest that their 'followers' post a picture visiting an exhibition while using a certain hashtag unique to the organization or challenging their 'followers' to recreate their favorite photo from a currently highlighted collection. Collaborations with international organizations like the World Digital Library and the International Federation of Library Associations will further develop awareness of Library materials. A monthly digital newsletter will be published with information about the Library for both staff and patrons. This will further involve the patrons and demonstrate that they are an integral part of the library while keeping them updated on the current and upcoming events and exhibitions. The Library will collaborate with local schools featuring educational segments on historical events and offer access to supplemental learning materials.

Assessment: Social media will be monitored for levels of engagement to determine which posts are most successful and which platforms have the most engagement. The metrics built into the platforms will provide this information. These metrics will be examined quarterly and the conclusions drawn will be used to continue or change engagement models. The newsletter will start in FY 2021 and a survey will be sent to respondents at the start of the third quarter to solicit feedback on newsletter contents. The results of this survey will be distributed to the newsletter team by the start of the fourth quarter of FY 2021 and changes to the newsletter based on the results will be adopted in FY 2022. Another survey will be given at the end of FY

2022. Collaborations with other organizations will be evaluated based on attendance, optional reflection surveys for attendees to determine impact, and with an eye to the cost of the program.

Objective 1.3: *Identify and implement new technologies to enhance user experience and Library offerings.*

Action Plan: The Library strives to uphold its reputation as a world cultural institution by promoting an environment of learning not only for the patrons but the staff as well. Staff will be encouraged to stay up-to-date with technology and programs vital to the functioning and promotion of the organization. The Library will make a concerted effort to identify and use technologies, exhibitions, programs, and incentives to keep patrons aware of services and materials available at the library, and to create additional relevant services for them. The Library will create and sponsor programs, incentives, and exhibitions that will inspire the patrons to be engaged with the organization and its collections. For example, the Library will post a “challenge” on social media and offer a reward for winning or completing said “challenge”. This can range from posting a photo featuring a favorite item while visiting the library or answering a trivia question about the Library of Congress or its operations correctly. .

Assessment: New technologies will be evaluated based on cost, ease of use, and potential impact on Library users and programs. The programs and exhibitions utilizing these new technologies will be assessed for success based on engagement numbers (e.g. attendance), level of impact on participants, and perceived impact on Library use with the goal of enhancing user experience in mind. Potential new technologies will be identified and evaluated quarterly with implementation of selected technologies expected within six months of selection.

Goal 2: *Increase access to the collection by expanding availability to a broader audience.*

Objective 2.1: *Develop a program to reduce the backlog of materials requiring digitization.*

Action Plan: A two-part plan will ensure this objective is met. First, in FY 2021, the Library will develop a course of action by determining the basic requirements for the digitization program. A team of existing staff, from a variety of levels and with a range of expertise on digitization, will be assembled to make decisions and lead the program. They will also collaborate with those developing and implementing policy changes for the online catalogue to ensure newly digitized materials are available online. Their plan will account for the number of staff required, the cost of the program (including salaries and additional equipment), volunteer requirements, and will determine an initial workflow to begin the process. They will also establish goals for the program (e.g. 50% reduction by the end of FY 2023). The second part of this plan starts in FY 2022 with the recommendations implemented, new staff hired and trained, and initial feedback on the workflow being incorporated moving forward.

Assessment: Assessment will be focused on the percentage of backlog remaining from the start of FY 2021. Goals recommended by the planning team will serve as the main assessment points to ensure the program remains on schedule for FY 2025 completion. Unless otherwise specified by the planning team, informal quarterly check-ins will also happen to determine if there are additional needs. Examination of the percentage completed and the percentage remaining will provide guidance for additional program staffing and equipment to meet the final deadline.

Objective 2.2: *Develop policies and procedures for ensuring the online catalogue is accurate and maintained with all current offerings available.*

Action Plan: The Library will form a committee of staff from the collections department and a team of librarians. This committee will reevaluate collection management policies at the beginning of FY 2021 and those specifically designated for the practice of maintaining accurate records will be revised accordingly to ensure that the online catalogue is kept up to date. The committee will plan and implement a full inventory of the Library's holdings beginning in FY 2021. An appointed supervisor will ensure that the inventory is carried out and that all holdings are included in the online catalogue in all available formats so as to facilitate findability, accessibility, and usability. This supervisor will provide additional support as needed to ensure that items are being catalogued correctly and that the inventory is completed by the end of FY 2021. Committee members will report challenges in carrying out the action plan immediately to the supervisor and he/she will respond accordingly to any needs. The supervisor will coordinate additional support and, if necessary, communicate needs to the Library Director or other appropriate bodies. The supervisor will maintain regular communication about pending matters with any and all parties involved.

Assessment: The committee will meet bimonthly to report progress. Each department will submit quarterly inventory reports to the supervisor and the supervisor will collect these to serve as documentation of progress. The committee will review the completed Library inventory by department and then as a whole at the end of FY 2021. A full inventory will be completed biannually to ensure that the online catalog continues to reflect all current Library holdings.

Objective 2.3: *Reevaluate access policies regarding reading rooms and check out of physical items.*

Action Plan: A committee selected from public librarians, reading room attendants, supervisory staff, and Executive Committee members will discuss the policies regarding the

appropriate minimum age for each reading room. They will also examine policies around getting a “Reader’s Card” with the goal of providing access to the greatest number of users possible. The Library will reassess the collection and determine which items can be loaned to the public, which items cannot be loaned, and which can only be loaned to members of Congress. They will examine policies related to Inter-Library Loan participation, to once again ensure the greatest number of users have access to the Library’s world-class offerings. They will also create a plan to reassess these policies on a regular basis, at least biannually, to ensure they continue to align with the Library’s mission, vision, and values. The committee’s recommendations will be sent to the Library Director and Executive Committee for implementation.

Assessment: The committee will be formed in FY 2021 and present their recommendations to the Library Director and Executive Committee in the first quarter of FY 2022. The recommendations will be implemented by the end of FY 2022 and will be assessed for efficacy and sustainability throughout FY 2023. In FY 2024, the policies will be reevaluated based on criteria determined by the committee, under direction from the Executive Committee, and with the goal of increasing accessibility in mind.

Goal 3: Engage users by developing and enhancing their connection with the Library.

Objective 3.1: *Develop a marketing plan to connect users with Library resources and information.*

Action Plan: A marketing team will create a plan for regular communication with patrons with the goal of strengthening their connection with the Library and expanding interest in the Library for a larger audience. Promotional efforts will be guided by learning about patron needs and requests from public service staff, new additions from collections staff, and ongoing digitization programs and other services. Social media platforms (Instagram, Twitter, Facebook,

Snapchat, etc.), brochures and flyers distributed to local businesses, and association with organizations, such as the International Federation of Library Associations, will be used to promote the Library's holdings, programs, and services with special attention to current and upcoming offerings and opportunities for user involvement. The Library will designate specific staff members to enact the developed marketing plan. The Library will also create a committee at the beginning of FY 2021 to plan and implement virtual and/or interactive online experiences for patrons who cannot physically visit the Library.

Assessment: Collection use statistics and attendance counts for exhibits and events will be recorded on a quarterly basis. Patron surveys will be developed for and analyzed after every exhibit or promotional event. These surveys will include questions that ask about where they heard about the event to determine which marketing efforts were most effective. Evaluation of these measures will be communicated with staff and used as guides for the marketing team to continue what is working and to pursue other creative routes to replace the methods that were not as successful. The built-in metrics and engagement features on social media sites will also contribute to determining the most successful efforts.

Objective 3.2: *Provide access to a variety of resources in different formats in our collection such as print, digital, audio, or otherwise to engage users.*

Action Plan: Beginning with FY 2021, collection analysis reports will be compiled to establish a baseline of the Library's holdings. The Library will develop the collection by incorporating a variety of resources in different formats into the existing collection, being mindful of the goal to provide users the ability to engage with different types of resources. Using the baseline data, the Library will create a balanced collection by acquiring items that are the least proportionate in the current collection as well as by digitizing the most popular collection

items so as to make these more accessible to a broader audience. Regular marketing efforts and exhibits will serve to promote new additions as well as help showcase some of the Library's treasured collection items. Quarterly examination of collection use will be used to determine a connection between use and promotional efforts. In addition, reference requests will be logged by those who provide services as with "Ask a Librarian" and shared with the Library Director and other bodies to ensure that collection management and collection development efforts are guided by relevant user needs. These reports will be shared with the Library Director and other bodies in their expected time frames for further evaluation.

Assessment: Collection analysis reports will be examined at the beginning of FY 2021 and guide collection development with a goal of creating a balanced collection of different formats. Collection use statistics will be evaluated each quarter of FY 2021 to guide further considerations for new additions and to direct marketing efforts. This process will continue through FY 2022 onward. Annual re-examinations will determine the careful curation of existing items for each subsequent fiscal year to make these items more identifiable and accessible.

Objective 3.3: *Provide a welcoming place for all users and facilitate participation in library programs.*

Action Plan: The Library embraces intellectual freedom and diversity and these ideas will be reflected accordingly by ensuring a place for everyone in the Library. Welcoming participation from a vast and diverse American public by continuing initiatives such as By the People will demonstrate the high regard the Library holds for user contributions. Careful curation of materials will also reflect the Library's responsibility and civic duty to provide users with a diverse set and wide scope of resources. Librarians and staff will coordinate exhibits and implement a variety of programs that celebrate diversity and openly encourage exploration by

the general public to increase user engagement. The Library will continue to participate in organizations that support the same beliefs such as the American Library Association and the International Federation of Library Associations and will uphold shared values and codes of ethics. Staff will work to identify and communicate gaps in areas that may be impeding user connection with the Library to the marketing team to ensure that exhibits and programs are relevant to user needs and add appeal. These efforts will communicate the idea of belonging for all users.

Assessment: Completed voluntary visitor surveys will be evaluated on an ongoing basis to grasp the public's impressions of the Library. These results will be examined as collected at the beginning of FY 2021 and onward with special attention to praise or complaints regarding diversity. Survey results will serve as guides for diversification efforts. This process will continue as a regular, ongoing quality assessment. Annual re-examinations of data gathered will benchmark progress and evaluate the success of various plans used over time as well as to update questions to collect the most relevant data. Necessary changes will be made as they are identified via the assessment methods.

Goal 4: Provide accessible learning opportunities for all users.

Objective 4.1: *Develop and implement a variety of programs and services that encourage exploration and creativity using the Library's resources.*

Action Plan: A team of librarians from different departments will design programs and services that promote lifelong learning. These programs and services will be developed to be accessible to all potential users, including those who may only be able to access the Library digitally. The team will participate in professional development at the start of FY 2021 focusing on practices and technologies that encourage inquiry, innovation, creativity, and collaboration.

New and/or upgraded existing programs and services will be designed to include learning experiences with activities in the focus areas of the professional development attended utilizing readily available resources and technologies. The team will communicate with the Library Director regarding any supplemental needs with explanations of how these additional resources can potentially enhance user learning experiences by the end of the first quarter of FY 2021. Said programs and services will encourage learning opportunities for users of all ages by including family-oriented events, be adapted to be ADA compliant, and include translation services whenever possible. New and/or updated programs and services will be rolled out in the second quarter of FY 2021 and continue throughout the year. Librarians will communicate with the Library's marketing team to promote these programs and services.

Assessment: Programs and services will be evaluated for success based on attendance, impact, and participant feedback. Marketing efforts will also be evaluated by examining types of programs, level of engagement with marketing materials, and platforms used. The results of this will assist in more targeted marketing efforts for future programs. Using the evaluation from each program and service, the library team will create an updated plan for FY 2022 that continues to encourage exploration and creativity.

Objective 4.2: *Establish and develop outreach programs with other information organizations and educational institutions.*

Action Plan: An outreach program will be established to encourage lifelong learning by building collaborative efforts with other information organizations and educational institutions. A team of librarians and staff will determine how many and which type of organizations will initiate this outreach program at the beginning of FY 2021 and add on accordingly commensurate with the time, resources, and staffing available. The team will establish

communication with each institution and create a network of contacts. They will inquire about existing needs and opportunities these organizations have already identified for their users and propose reasonable support programs for each organization within the first quarter of FY 2021. Smaller subsets of the outreach team will then collaborate with the contacts from each organization to design and integrate relevant supplemental learning programs and experiences and make these accessible to these patrons either physically, digitally, or both following timelines set by the collaborative teams for each organization. The team will maintain regular communication with the marketing team to promote the program and successes. Outreach efforts will provide users with new learning opportunities that build on pre-existing information needs while expanding the Library's collection to a wider user base and strengthening partnerships with the Library.

Assessment: Organizations will be selected based on available resources and the ability to support the Library's goals and meet user's needs. Outreach efforts will be evaluated based on the level of participation (attendance, time spent at the event, etc.) and the perceived impact, as determined by participant response. Participant responses will be gathered through voluntary surveys. These surveys will also provide information for determining additional needs that can be addressed through this outreach program. Community response, press coverage, and metrics from social media sites will also serve as measures of effectiveness and success.

Conclusion

The Library of Congress will implement this strategic plan beginning in FY 2021 and will follow these goals and objectives through FY 2025. This plan will expand access to Library services, provide new opportunities for engaging users and encouraging lifelong learning, and increase the Library's visibility, both nationally and globally. As the Library evolves, the

organization will continue to engage in environmental scanning to determine new and changing community needs and to ensure that the Library's operations continue to embody its mission, vision, and values. Following this strategic plan will allow the Library to achieve its vision of being a world cultural institution and provide opportunities to inspire lifelong learning and community engagement.

Annotated Bibliography

Albright, K. S. (2004). Environmental scanning: Radar for success. *Information Management Journal* 38(30), 38-45.

Kendra Albright currently serves at Kent State University as a professor in the School of Information and Director of the African Studies Program. She has a background in information science and African studies and has completed research in both fields. Her article on environmental scanning is aimed at leaders in information organizations looking to understand external influences through environmental scanning. Drawing on previous literature on the topic, Albright makes the case for organizations using environmental scanning as part of the strategic planning process. The article defines environmental scanning, examines the purpose in the context of strategic planning and the benefits of performing an environmental scan, and details the methods to be employed during an environmental scan. The information gleaned from this article provided an excellent foundation from which to begin the environmental scan of the Library of Congress. The discussion of how environmental scanning fits with the overall strategic planning process was also useful as it highlighted the importance of understanding external factors that can influence an organization.

Babalhavaeji, F. & Farhadpoor, M. R. (2011). Academic Libraries' External Environment and Environmental Scanning by Managers of Central Libraries of Islamic Azad Universities of Iran. *Library Philosophy and Practice*, 12(2), 280-294.

Fahimeh Babalhavaeji and Mohammad Farhadpoor are currently serving as faculty members in the Department of Library and Information Science at the Islamic Azad University in Tehran, Iran. The article contains a study analyzing how the managers of the Islamic Azad University libraries discern how important the external environment is and how rapidly it changes. Babalhavaeji and Farhadpoor stress that through environmental scanning, important information can be utilized in order to discover the role and influence of the library within the current environment. Not only does this information help managers understand and interpret the external environment, but it also demonstrates the importance of environmental scanning. It is suggested in the discussion section that more focus needs to be put on the customer and technological aspects of the library since the evidence demonstrated that these sectors are the most uncertain.

Bennett, S. (2015). Putting learning into library planning. *Portal: Libraries and the Academy*, 15(2), 215-231. doi: <http://dx.doi.org/10.1353/pla.2015.0014>

Scott Benett was University Librarian at Yale University and author of several essays on library space planning. After retiring from Yale University, he served as a consultant on the concept of

library space planning that is driven by a focus on learning and influenced by technology. In this article, Bennett emphasizes the need for a learning-oriented focus in library planning. Rapid changes in technology have led to new collaboration between library professionals and information technologists with different backgrounds. The shift from physical to virtual has had an impact, especially on academic libraries. Bennett argues that by ignoring a library's physical space and the associated limitations professionals can focus on prioritizing learning and information access. He points out that these changes have the potential to benefit information communities so long as they manage to adapt. Looking beyond physical limitations in the planning process allows organizations to capitalize on other opportunities. Recognizing that the Library of Congress exists in only one physical location, this analysis was able to use Bennett's recommendations and focus on learning in all forums.

Cabonero, D. A., Tindaan, C. B., Attaban, B. H., & Manat, D. A. S. (2019). The effectiveness, reasons and problems in current awareness services in an academic library towards crafting an action plan. *Library Philosophy and Practice*, 1-26.

David A. Cabonero is an Associate Professor in the School of Graduate Studies at Saint Mary's University where he teaches Library and Information Science courses and is the Director of Saint Mary's University Learning Resource Center. At this point in time, information on the other authors could not be located. This article discusses how access is a key element for libraries to consider during the planning process. A collection, while important and useful, is useless if it cannot be accessed properly. The authors suggest using "Current Awareness Services" to allow users to know and retrieve desired content. For a successful system, there must be prompt and useful service and interface. The discussion of access to information proved most useful for this organizational analysis. The Library of Congress has an impressive collection, but access to that collection is poor. Therefore, remembering access during this planning process has provided an opportunity to increase access.

Castiglione, J. (2008). Environmental scanning: An essential tool for twenty-first century librarianship. *Library Review* 57(7), 528-536. doi:
<http://doi.org/10.1108/00242530810894040>

James Castiglione is an Assistant Professor at Brooklyn College specializing in Medical and Special Libraries. His article "Environmental scanning: an essential tool for twenty-first century librarianship" was published in 2008 in *Library Review*. *Library Review* is a peer-reviewed, academic journal which focuses on issues related to the library and information sciences. Based on the journal's intended audience and the article's focus, Castiglione is addressing information professionals, particularly in established libraries. Castiglione argues environmental scanning should be utilized by information professionals to create effective and forward-thinking strategic objectives that will keep libraries competitive with other digital information sources. To

accomplish this goal, he suggests libraries create a dialogue to share research and successful programs. Castiglione creates a compelling argument in his article by citing the resources organizations in the USA, Japan, Italy, UK, and France use to implement environmental scans that could be reduced if organizations collaborated their findings.

Choo, C. W. (2001). Environmental scanning as information seeking and organizational learning. *Information Research: An International Electronic Journal*, 7(1), 1-23.

As a current faculty member of the Information program at the University of Toronto, Chun Wei Choo serves as a valuable contributor to the study and understanding of information. With a particular interest in information behavior and organizational learning, Choo has contributed to research in these areas and his expertise has developed into a myriad of scholarly articles and reputable books about these and other related matters. In this article, published in the journal *Information Research*, Choo defines and explores environmental scanning and how it serves as a guide for organizational learning as well as a tool for ensuring the future success of the institution. A conceptual framework for environmental scanning is included along with a model delineating environmental scanning as organizational learning. Moreover, Choo presents four modes of environmental scanning and discusses how the data analyzed through each mode can benefit goal-setting and decision-making for favorable outcomes. These modes are very useful for organizations looking to complete environmental scanning.

Edwards, J. B. (2015). Developing and implementing a diversity plan at your academic library. *Library Leadership & Management*, (30)2, 1-11.

Julie Edwards is a Fullbright Scholar currently serving as an Instructional Designer at Niche Academy. She has a background in public libraries and has published multiple articles on libraries and community and libraries and diversity. Edwards' article discusses a simple outline and set of goals, specifically geared toward academic libraries, to assist librarians in creating and implementing a diversity plan in their libraries. According to Edwards, a librarian should create a diversity plan geared specifically toward his or her own library, gather information, and communicate with both staff and patrons before implementation. Edwards' descriptions of and advice for designing strategic choices, goals, and action plans, are detailed enough to provide academic librarians with explicit guidance in creating more diversity in their libraries, but broad enough to leave a margin for individual libraries and their needs. Although this article focuses specifically on strategic planning for diversity, the planning process is applicable to all facets of strategic planning and the focus on communication and environmental scanning in the information-gathering process is key.

Huff-Eibl, R., Miller-Wells, J., & Begay, W. (2014). Understanding the voice of the customer: Practical, data-driven planning and decision making for access services.

Journal of Access Services 11(3), 119-134. doi: 10.1080/15367967.2014.916150

As members of the University of Arizona Libraries Access and Information Services Team, the Huff-Eibl, Miller-Wells, and Begay examined roles for frontline staff in needs assessment and services evaluation. This article summarizes their findings and details their methods. The data collected came from University of Arizona Libraries staff and usage metrics with information on national trends pulled from reports, including the NMC Horizon Report, social networking sites, and LISTSERV. Using environmental scanning among other methods, the team performing the needs assessment were able to make decisions on how best to meet user and staff needs. The continual needs assessment, evaluation, and planning figure provided a useful diagram for understanding how needs assessment contributes to strategic planning. The inclusions of staff feedback as part of the environmental scan provided a valuable example of the importance of staff buy-in and inclusion during environmental scanning and strategic planning. The article does an excellent job detailing the steps taken in this needs assessment and then demonstrates how those findings were applied to the following decision-making process.

Katopol, P. (2014). Managing change with environmental scanning. *Library Leadership and Management*, 29(1), 1-7.

Patricia Katopol, an associate professor in the School of Library and Information Science at the University of Iowa, has an extensive history with information management and examining the social impact of information use. Her interests and experience with understanding information and information use lead her in conducting relevant research in the field. In this article, Katopol explains the purpose and importance of environmental scanning for library management, discusses challenges to environmental scanning, and offers suggestions for conducting an environmental scan of an organization. In particular, she stresses that libraries must perform regular environmental scans rather than just reacting to changes that may surprise them. Katopol also emphasizes the use of environmental scanning to make informed decisions that engage management in preserving the vitality of the organization. She slightly introduces the ongoing process of environmental scanning, strategic planning, and the evaluation of established goals as a means to set the organization up for success in the future.

Katopol, P. (2017). Maybe best practices aren't: How survivorship bias skews information gathering and decision-making. *Library Leadership & Management*, (32)1, 1-4.

Patricia Katopol is an associate professor at the University of Iowa and has a background in information management and information use. Katopol examines the phenomena of survivorship bias, or, that bias which may lead experienced experts to make the mistake of repeating previous

strategies, which may have been successful by luck rather than by skill. Katopol argues, in this article, that rather than relying on the processes of past successes, environmental scanning and information gathering should always be used to determine what the needs are of an individual library and from there to decide what the “best practices” are for it specifically. Katopol’s theory is that taking a step back as a librarian allows for reassessment of decision-making and implementation of policies and practices that ensure the best possible result. By treating libraries and their communities individually, experts in the field can avoid falling into survivorship bias mentalities. Katopol’s discussion of environmental scanning demonstrates how it can provide useful data in the planning process and thus help in avoiding survivorship bias.

Mitchell, M., & Witthus, R. W. (1991). Planning for diversity: strategic planning for an urban academic library. *Journal of library administration*, 13(3-4), 157-165.

Marilyn Mitchell has a background in librarianship and retired from her position as Library Director at the University of Puget Sound. Rutherford Witthus has a background in both academic and public libraries, archives, and museums. Libraries are seldom independent and usually subject to some oversight. How that information agency achieves its directives under the aegis of another organization depends on understanding aspects of that institution. This article focuses on urbanism and its factor in the strategic planning process of the Auraria Library in Denver. It also highlights an important and unique aspect of its utility: its academic patrons attend three separate colleges. Auraria’s distinctive approach in developing a strategic plan combines its place in local geography, socioeconomic characteristics of the community, the needs of its patrons, and the attributes of its parent organizations. In order to succeed, the institution needs to shape its role in an ever-changing environment and develop its mission, vision, and value statements in concert within a larger structure. This article provides an excellent example of how to consider external factors while engaging in strategic planning to best serve the community and develop mission, vision, and value statements that strive to meet community needs.

Newton Miller, L. (2018). What is helpful (and not) in the strategic planning process? An exploratory survey and literature review. *Library Leadership & Management* 32(3), 1-27.

Laura Newton Miller is currently serving as the Head of Collections and Assessment at Carleton University’s library. She has a background in assessment and strategic planning research and serves as a member of the *Library and Information Research* editorial board. This article, focused on university libraries in Australia, Canada, New Zealand, and the UK, is an exploratory survey and literature review examining what is useful during strategic planning. It includes direct quotations from library staff responding to the survey with opinions on parts of the strategic planning process. Most respondents found environmental scanning useful and the author identified useful reports for examining external trends during environmental scans. As the literature review for this organizational analysis focused on environmental scanning, this information was vital to the authors’ understanding of the environmental scanning process.

Additionally, Newton Miller's article highlights the importance of staff engagement and an external focus during the environmental scan, which aided in performing an environmental scan of the Library of Congress.

Parker, R. M. N., Boulos, L., Visintini, S., Ritchie, K. & Hayden, J. (2018).

Environmental scan and evaluation of best practices for online systematic review resources. *Journal of the Medical Library Association*, 106(2), 208–218.

<https://doi-org.libaccess.sjlibrary.org/10.5195/jmla.2018.241>

Robin M. N. Parker is currently serving as the Evidence Synthesis and Information Services Librarian at Dalhousie University in Halifax, Canada. Leah Boulos and Sarah Visintini both serve as Evidence Synthesis Coordinators for the Maritime SPOR Support Unit in Halifax. Krista Ritchie currently serves as an Assistant Professor at Mount Saint Vincent University in the Education Department in Halifax. Jill Hayden is an Associate Professor at Dalhousie University in the Department of Community Health and Epidemiology in Halifax. The article discusses how the librarians and educators involved in the study evaluate online learning resources focusing on content, design, interactivity, and usability. The results revealed that awareness of resources that include design and interactivity help librarians make informed recommendations that better suit patron needs. Parker, Boulos, Visintini, Ritchie, and Hayden agree that some best practices for online learning include providing high-quality resources, regardless of the format or time commitment of the user. In the planning process, it is important to think about evaluation methods, particularly for online resources and programs. The strategic goals developed in this report use some of these methods of evaluation in assessing progress and success.

Petrides, L., Goger, L., & Jimes, C. (2016). The role of "open" in strategic library planning. *Education Policy Analysis Archives*, 24(36), 1-17.

Lisa Petrides is CEO and founder of the Institute for the Study of Knowledge Management in Education (ISKME) and an open educational resources expert. Letha Goger teaches at Fresno Pacific University and focuses on advancing open education practices around the globe. Cynthia Jimes is the director of research at ISKME. In this article, the authors discuss how academic libraries are evolving due to new levels of connectivity and technology. They suggest open collection development and curation policies to provide access to the wide virtual user base. Instead of focusing on the institution that holds the information, users and libraries benefit by integrating a more open system. This paper provides an excellent reference for utilizing technology to better connect users with an organization's collection.

Rathi, D., Shiri, A., & Cockney, C. (2017). Environmental scan: A methodological framework to initiate digital library development for communities in Canada's North. *Aslib Journal of Information Management*, 69(1), 76-94.

Dinesh Rathi has a background in engineering, business, and libraries. Ali Shiri has a background in information science with a focus on digital libraries. Both Rathi and Shiri are faculty in the School of Library and Information Studies at the University of Alberta. Catherine Cockney served as manager for the Inuvialuit Cultural Resource Centre and worked to digitize the collection. An environmental scan of the Inuvialuit Settlement Region in Canada was conducted by a Canadian research university, primarily through telepresence, over 2500 kilometers (ca. 1550 miles) away. The research focused on digital resources from libraries for the community based on the knowledge that little research existed on digital libraries in Canada's northern communities. Due to the sensitive nature brought by the work involved, the researchers established partnerships with local institutions. It also looked at the political and regulatory landscapes to find organizations that would work with locals performing the scan. The results of the scan encouraged further study into the Arctic regions in and outside of Canada. By reaching out to local partners, the researchers demonstrated the importance of drawing information from the community during an environmental scan and creating buy-in from community members.

Shaffer, R. I. (2014). From inertia to innovation: Information-based organizations in the Age of Intelligence. *International Federation of Library Associations and Institutions*, 40(3), 145-149. doi: <http://doi.org/10.1177/0340035214543167>

As the Law Librarian at the Library of Congress, Roberta I. Shaffer has extensive experience and expertise in library operations. Shaffer was a Fulbright senior researcher and has been working in law libraries since 1975. Her article was published in the *International Federation of Library Associations and Institutions* journal. The International Federation of Library Associations and Institutions is an international organization that connects libraries across the globe to one another. This organization has been vital in maintaining global standards for libraries and information professionals. In her article, Shaffer, outlines the process organizations need to take to encourage and successfully innovate best practices. She addresses the importance of every member of staff feeling involved in strategic objectives in order to facilitate creativity and innovation. Her article provides a practical way for libraries to implement strategic objectives and environmental scanning, which is enhanced by her prolific experience.

Shiri, A., & Stobbs, R. (2018). Community-driven user evaluation of the Inuvialuit cultural heritage digital library. *Proceedings of the Association for Information Science & Technology*, (55)1, 440-449. doi: <http://doi.org/10.1002/pr2.2018.14505501048>

Ali Shiri is a professor, Associate Chair, and Graduate Coordinator with the School of Library and Information Studies at the University of Alberta. He has a background in information science. Robyn Stobbs is pursuing her Ph.D. from the School of Library and Information Studies at the University of Alberta and has been a research assistant on the Inuvialuit Voices Project. This article examines the creation, implementation, and usefulness for the Digital Library North (DLN) project, designed to create culturally-aware library services for the Inuvialuit population in Canada. The purpose of the project was to record and preserve tribal information for future generations, in a cooperative endeavor with the tribes themselves. The focus of the article is largely on communicative processes with the tribe itself as well as information gathering processes for the environmental scanning aspect of the project. The results of the environmental scan were used to further develop the digital library based on feedback from the community. The article also discusses the necessity of integrating a diverse range of shareholders into daily library operations. Reaching out to a range of community members and soliciting their feedback is a crucial step of the strategic planning process and will provide useful data for evaluating programs and services as they relate to the organization's mission, vision, and values.