

Evidence-Based Strategic Planning: Practical Strategies

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The purpose of strategic planning is to create a road map or a plan for an organization to move forward. It clarifies the mission and vision and names priorities in order to allocate resources (Coghlan & Brydon-Miller, 2014). In a time of ever-tightening budgets, strategic plans can be a tool for aligning academic library priorities with the larger institution and providing value to students and researchers with constantly changing technology and information needs (Thompson et al., 2019, p. vii). These financial and technological pressures make it even more important to base a library strategic plan on evidence rooted in stakeholder feedback, institutional priorities, and the landscape of higher education. Additionally, a strategic plan based on evidence provides stakeholders with a feeling of connection to the plan and likely improves success in plan implementation (Sullivan & Richardson, 2011). This chapter focuses on evidence-based strategic planning at two institutions, the United States Naval Academy's Nimitz Library and the University of Minnesota Libraries, and provides a toolkit to support evidence-based strategic planning (Aspinall et al., 2022). While there are a variety of books and articles providing research and background on writing library strategic plans (Thompson, et al., 2019; Dubicki, 2011; Miller, 2018), there is little that provides practical details and tools for evidence gathering both from internal and external stakeholders. This chapter aims to fill that gap.

Background

While strategic plans are used by a variety of organizations, including heavy use in the corporate sector, academic libraries have a unique set of stakeholders and distinct sources of evidence. A common starting point for evidence gathering is looking internally through a process that asks library staff to reflect on their work. There are a variety of methods mentioned in the literature. One common approach is the SWOT (strengths, weaknesses, opportunities, threats) analysis, or alternatively the SOAR (strengths, opportunities, aspirations, results) analysis. The difference between these tools is that SOAR follows the Appreciative Inquiry model (Cosby, 2018). Appreciative Inquiry (AI) is an organizational development process that seeks to emphasize what is working well in an organization rather than root out deficits and solve problems. Rather than emphasizing a top-down model for planning, AI focuses on engaging stakeholders at all levels to envision the positive future of an organization and encourages them to engage in creating the future they helped imagine (Copperider, Whitney, & Stavros, 2008). While the literature seems to primarily describe SWOT or SOAR analysis done internally by library staff at a retreat or other similar event (Harris, 2018), Cosby mentions these tools can also be used for gathering feedback from external stakeholders through focus groups (Cosby, 2018).

Because the academic library is part of a larger ecosystem, it cannot rely simply on internal evidence. Alignment with institutional priorities, goals, mission, and vision is crucial and is particularly important for future funding requests and general campus support for library priorities (Thompson et al., 2019). Recognition of broader trends in higher education and research that impact the work of academic libraries is also important to strategic planning. The process for uncovering this information is often referred to as an environmental scan. Environmental scanning is a long-established approach first introduced by Aguilar in 1967 and can be described as a “method for identifying, collecting, and translating information about external influences into useful plans and decisions” (Albright, 2004, p. 40). Reports from academic libraries, higher education, and the local institution can provide insight into trends and emerging opportunities and challenges within these spheres. One tool for analyzing current and potential alignment is the Library Impact Map (LIM) developed by Megan Oakleaf (2017). This tool organizes library services in relation to institutional foci and has users rate the current and potential impact.

In addition to information gathered through internal reflection and an environmental scan, a library strategic plan should be rooted in evidence related to stakeholders’ needs. Miller’s 2017 research identifies the most common mechanisms for gathering feedback from stakeholders are surveys and focus groups, followed by interviews. Miller notes that a mix of qualitative data from focus group and open-ended survey questions along with quantitative data from focus groups can provide a “fuller picture” (p. 13) in understanding stakeholder needs. A survey can be used for large-scale feedback while a focus group can provide more in-depth feedback from stakeholder representatives. While there are numerous articles that discuss libraries developing and using surveys or focus groups to gain insight into their users (Garner & Martin, 2021; Mross & Riehmman-Murphy, 2021; Fajardo, Roth, & Dolinsky, 2021), there are fewer that discuss their use specifically for

strategic planning. Thompson et al. (2019) describe the process of working with hired consultants to develop a survey to inform strategic planning and mentions that while the consultants brought skills in survey design, they worked with library administration and “pre-survey participants” to develop and test the questions to meet local needs. Thompson also notes that if the survey is developed in-house, it is important to seek help from staff that have experience in writing surveys. Another option for learning about stakeholder needs is to use an existing survey tool such as LibQual+ or ClimeQUAL (two surveys developed by the Association of Research Libraries). Haricombe and Boettcher (2004) write about their experience using LibQual+ along with in-house-developed surveys and focus groups. Higa-Moore, Bunnett, and Mayo (2002) describe their experience conducting focus groups for library strategic planning. They mention unexpected benefits of conducting focus groups such as staff excitement over the wealth of qualitative data and the goodwill generated by talking directly to patrons in the strategic planning process. There are also a variety of additional tools that could be used to gather information for strategic planning. For example, Carlsson (2020) describes user observation and interviews as well as using existing collected data about users (circulation data, etc.).

Case Study I: United States Naval Academy

Setting

The United States Naval Academy is the Navy’s undergraduate college that graduates approximately 1,000 midshipmen each year with a bachelor of science degree. Those midshipmen commission as ensigns in the Navy or second lieutenants in the Marine Corps (United States Naval Academy, 2022). Nimitz Library supports the faculty, staff, and approximately 4,500 midshipmen attending the Naval Academy by providing space, resources, and services to foster research skills, critical thinking, and a spirit of lifelong inquiry. In 2019, as part of a periodic academic program review mandated by the provost, Nimitz Library staff engaged in a reflective self-study followed by a visit from a panel of external experts. This exercise highlighted the need to update the library’s 2013 strategic plan in order to establish priorities for library staff and demonstrate how the library contributes to the academic mission of the Academy. With that goal in mind, this section provides an overview of Nimitz Library’s strategic planning process mapped to Koufogiannakis and Brettle’s model for evidence-based library and information practice.

Articulate

To update the strategic plan, the library director appointed me as chair of a strategic planning committee, and I recruited seven staff, representing all library departments, to join the committee and help lead the planning process. In an effort to capitalize on the forward momentum generated from the program review process, the committee identified an ambitious timeline and hoped to complete the strategic plan by the end of summer

2020. Early in the planning process, we agreed that the plan must remain aligned with the mission and priorities of the Naval Academy, should provide broad priorities to guide library decision-making at all levels, and should include as many voices in the process as possible. To accomplish those three goals successfully, we recognized that the plan would have to be informed by a variety of types of evidence, including qualitative feedback from staff, quantitative data about the library's current operations, and a variety of other types of evidence from the library, institution, and scholarly community.

Assemble

The committee wanted to begin the planning process by gathering feedback from library staff. However, we recognized that during the program review process, library staff had become accustomed to critiquing the organization and identifying challenges. While that information was valuable and useful during the program review, we needed to shift the library staff's thinking away from the challenges of the past and present toward a more aspirational future. This led us to the appreciative inquiry (AI) model.

AI can help an organization focus on “what works” and encourage organizations to capitalize on those strengths rather than focusing on the deficits. As a result, those included in the visioning process are connected to and inspired by the strategic initiatives they helped develop (Watkins & Mohr, 2001). We drew heavily from the AI model while structuring the kickoff event for library staff.

The committee drafted questions for stakeholders that encouraged them to focus on the organization's strengths and opportunities (see toolkit: Nimitz Library Strategic Plan Staff Kickoff Guide for Table Leaders). We asked the following questions of library staff during an all-staff strategic plan kickoff meeting:

- What do you see as our strengths that need to be maintained as we adapt to new and changing needs?
- Imagine that you just woke up from a long, deep sleep and the fall 2023 semester is about to begin. You're hungry so you head right to The Club for a meal. In the booth behind you, you overhear two people talking about the library. You can't tell if they're midshipmen, faculty, or library colleagues, but you overhear them talking about the changes that have happened in the library. They say, “The changes in Nimitz Library have been really meaningful and impactful. I really noticed the change started about three years ago when they _____.”

Staff discussed their responses in small groups and the discussion was recorded by table leaders, who were also members of the strategic planning committee.

We anonymized and reviewed the responses from library staff. Then, by grouping comments and feedback from library staff, the committee identified common themes that were present in the feedback. Those five common themes—spaces, staffing, services, outreach, and collections—gave the strategic planning committee a framework in which to situate additional incoming data.

Following the kickoff meeting with library staff, we identified additional stakeholders whose insights were critical to creating a successful strategic plan. While there were

numerous stakeholder groups, given the ambitious timeline, we decided to focus on gathering feedback from two key stakeholder groups: midshipmen and faculty. To expedite the process, we decided to survey the stakeholder groups and, in the spirit of AI, structured most survey questions to focus on the positive and to identify fundamental things that we can build on to embody a more idealized future (see toolkit: Nimitz Library Midshipman Survey Questions, Faculty Survey Questions). We tested the survey instruments with a small group of midshipmen and faculty. Based on their feedback and interpretation of the questions, we made minor revisions to the question sets. In late February 2020, we distributed surveys via email to 50 random midshipmen and 50 faculty. The identities of the 100 participants were selected, at random, by staff in the Institutional Research Office.

The Institutional Research Office, in collaboration with the library's strategic planning committee, designed the survey using institutionally supported survey software, sent the survey to the randomly selected participants, and packaged the data to return to us. We reviewed the results of the surveys and found the results aligned with the five common themes previously identified from the library staff kickoff event. With that alignment in mind, two committee members were assigned to each of the five themes so they could shepherd the remaining data collection and analysis. To facilitate the review and analysis of a variety of data points, the committee engaged in a structured environmental scan. Each of the five teams was asked to identify a variety of evidence created in one of four contexts:

1. in the library with strategic planning in mind (e.g., library staff kickoff data and stakeholder survey results);
2. in the library for another purpose (e.g., circulation statistics and feedback from the external experts that sparked the strategic planning process);
3. institutional documents (e.g., the institutional strategic plan and academic master plan); and
4. literature, ideas, or information from beyond the institution that might be critical to our planning process (e.g., journal articles and strategic plans from other libraries).

To keep the evidence organized, the teams used a common template to report on the information related to their assigned theme (see toolkit: Nimitz Library Strategic Plan Possible Sources for Information Gathering).

Assess

After we established a full picture of the environment, the team members assigned to each theme reviewed and *assessed* the information to produce a first draft strategic direction and objectives to move the library forward. Each team determined its own process for this step but was careful to review and evaluate evidence from each of the four contexts in the common template discussed above.

Agree

As the library continued the process, we regularly shared drafts of the strategic directions and objectives with library staff and administration. To build consensus and enhance

clarity, each strategic direction was coupled with a descriptive sentence intended to capture the broad intent. For example, the strategic direction *space* was coupled with the description, “develop welcoming and intentionally designed library spaces in order to support the diverse needs of 21st-century library users” and accompanied by objectives. The strategic direction *space* included the following objectives:

- Examine how and why library spaces are used in order to identify technology needs and other improvements that foster both group and individual study and promote co-curricular learning.
- Implement improvements to the library space by thoughtfully maximizing and repurposing existing spaces.
- Follow through on the first deck renovation with the development of a flexible and inviting space that promotes engagement among library staff, midshipmen, and the broader Naval Academy community, featuring improved signage and wayfinding.
- Press for critical infrastructure modernization and completion of delayed maintenance projects that reflect 21st-century changes in library usage.

Eventually, with the broad strategic directions and their objectives finalized, we handed the plan over to library department heads to engage their departments in developing specific, achievable tactics to support and enact the plan. Library departments, committees, and work teams reviewed the strategic plan in detail and developed specific tactics to support the plan. For example, one library workgroup developed the tactic “design and implement a space use study” to support the objective “examine how and why library spaces are used in order to identify technology needs and other improvements that foster both group and individual study and promote co-curricular learning.”

Adapt

The plan is still in place as of this writing and library staff gather annually to review progress, monitor progress toward goals, and make changes to the strategic plan based on changing circumstances and needs.

Regular feedback throughout the process helped staff embrace the strategic plan. Seeking, considering, and incorporating information from a variety of sources of evidence ensured that the library’s strategic plan aligned with the priorities of the institution and represented the needs of our stakeholders.

Case Study II: University of Minnesota Libraries

Setting

The University of Minnesota Libraries advances teaching, learning, research, and scholarship for the university’s 20,000 faculty and staff and over 50,000 students (University of Minnesota, 2022). Across the Libraries’ five main and seven branch locations, its 280 employees bring expertise in collections, technology, evidence-based inquiry, and critical

appraisal (University of Minnesota Libraries, 2022). The university welcomed its 17th president in 2019 and a new provost and a new dean of libraries in 2020. This leadership transition was marked by the launch of the university's MPact 2025 strategic plan (Office of the President, University of Minnesota, 2021) and a parallel strategic planning effort initiated by the dean of libraries that same year to update the Libraries' 2016–2018 strategic plan. The Libraries' strategic planning process launched in June 2020 with a one-year timeline to complete four phases of a strategic planning process: project development, input gathering, strategic plan development, and strategic plan review. This case study focuses largely on the input-gathering phase and touches upon its application to the strategic plan development.

Evidence-Gathering Process

The strategic planning process was managed by an organizational development staff member from the Libraries' Human Resources department. A team of nine with representation from across the Libraries was selected through a nomination process. Administrative support was also provided. The input-gathering phase was launched during a three-day retreat in September 2020 with members of the strategic planning team, human resources consultants, and members of Libraries leadership, including the dean and associate university librarians. During the retreat, participants received an overview of the process, implicit bias training, and completed a context map, a stakeholder analysis, a SOAR analysis, and a "One Bold Step" brainstorming exercise. Together, these foundational exercises identified external factors, trends, and forces that directly impact current work, provided an understanding of primary and secondary stakeholders, articulated strengths and opportunities, and introduced visionary thinking to set a course for the future. Each of these outcomes was refined through additional input gathering by the strategic planning team in the form of (1) an environmental scan, (2) a survey, (3) focus groups, and (4) a staff feedback process, the results of which had a direct influence on the strategic plan's mission, vision, values, and goals. These information-gathering activities were led by subgroups that allowed for equitable work distribution and time management as we met a three-month deadline. To ensure their greatest relevance to the strategic plan, these evidence-gathering activities were scoped to the primary stakeholders identified during the strategic planning retreat: current university faculty, staff, and students (external stakeholders) and current Libraries staff (internal stakeholders). This evidence gathering was critical in setting the direction for our strategic plan. It is important to note that each of these information-gathering approaches worked in concert with each other with a goal of reducing evidence gaps, limiting bias, and considering both current and future opportunities; the environmental scan used data and reports to balance internal/external trends and forecasting with quantitative and qualitative user feedback gathered through the survey and focus groups, and the survey and focus groups balanced user needs with staff perceptions. As one example, the collective findings from the internal and external evidence-gathering process demonstrated the important role the Libraries play in supporting students through equal access to resources, materials, and expertise

(e.g., space for study and innovation, accessible/affordable content) that positively impact their ability to study, meet course requirements, and graduate. The findings also identified opportunities for growth (e.g., student employment, diversity, equity, and inclusion). This evidence is directly tied to our vision (powering curiosity, discovery, and connection), values (we support the journey), and our strategic priority of student success with goals related to financial equity, support of the whole student, cultivating innovation and creativity through spaces, and strengthening information literacy.

Environmental Scan

For the environmental scan, three types of information were gathered for review and analysis. First, primary sources were identified and reviewed in order to have a greater understanding of local trends, needs, and resources. These included institutional reports and data sets on topics such as student enrollment, library usage, transfer students, campus climate, and student health. Secondary sources identified via a literature search were also used to call out larger trends summarized by the scholarly literature and through organizations such as Ithaka S+R, OCLC, ExLibris, the Coalition for Networked Information, and the Association of College and Research Libraries. Finally, existing strategic plans of peer institutions—primarily large academic libraries—were collected and reviewed to identify common strategic priorities and best practices for presenting strategic plans. The environmental scanning process allowed the strategic planning team to build upon the retreat activities by articulating in finer detail a summary of trends that are impacting the Libraries that should be accounted for in the strategic plan.

Survey and Focus Groups

Two approaches—a survey and focus groups—were used to gather direct input from key external stakeholders. The aims for both the survey and focus groups were similar to understand what is important to our primary external stakeholders, to learn where the Libraries have the most meaningful impact, and to identify areas for growth and improvement. These two approaches worked in concert with each other to better understand stakeholder needs. The analysis of the survey's quantitative questions identified themes, and the survey's qualitative questions and the focus group findings provided rich and nuanced details to articulate needs that should be addressed in the final strategic plan.

The survey provided an opportunity to engage with a broad set of our primary stakeholders. Careful attention was paid to the survey design, knowing that a tested question design will provide more relevant results. The survey subgroup drafted the questionnaire. The draft was then reviewed by a Libraries staff member with survey development expertise. The revised draft was further pilot-tested by university students, faculty, and staff through facilitated conversations. Participant feedback was documented and incorporated into the final questionnaire (see toolkit: UNM Libraries Survey Questionnaire, Survey Invitation Emails), which included a total of 23 multiple-choice and open-ended questions related to libraries spaces/equipment, services, and resources, being welcoming and

respected, access to resources, information needs met, impact on research and academic/professional success, One Bold Step, communication, and demographic information.

The focus groups provided an opportunity to have an in-depth conversation with our primary external stakeholders to gather rich, qualitative data about their needs and the impact of our work. Again, careful attention was paid to the design of the focus group experience. From the beginning, the focus group subgroup partnered with subject matter experts from the university's Usability Service, which brought expert knowledge and experience in running online focus group sessions. This partnership reduced the learning burden and lifted the administrative barriers as we were able to leverage tested processes, including script development, recruitment and incentive offers, training of facilitators and observers, and effective use tools for online focus groups (see toolkit: UMN Libraries Focus Group Project Plan, Code of Conduct, Facilitator Toolkit, Meeting Host Toolkit, Script, and Observer Worksheet Template). With this guidance, the subgroup was able to draft, test, and refine a script and prepare facilitators (recruited from across the Libraries) and observers as we completed nine, ninety-minute online focus groups over the course of two weeks, three each for faculty, students, and staff. The questions and engagement opportunities aligned with four goals: to understand if and why the Libraries currently matter, to understand why we matter and how we continue to matter, to understand how we continue to matter more, and to set a baseline understanding of the Libraries' role in a commitment to social justice. A debriefing and analysis session was held at the close of each session with facilitators and observers to capture broad themes along with specific feedback. For example, broad themes included spaces, access, communication, tutoring, relationships, as a few examples. Specific feedback related to access included a desire for more digital access to resources and affordable access to course materials/textbooks.

Staff Input

The information-gathering phase also included input from Libraries staff as our primary internal stakeholder. This process was guided through the development of a templated document that was shared with Libraries groups to provide information to the strategic planning team (see toolkit: UMN Libraries Library Group Input Activity). For the purposes of this exercise, groups were self-defined and could include departments, formally charged groups, steering committees, service teams, and interest groups, among others. The template prompted participants to summarize how they currently align with the priorities outlined in the university's MPact 2025 strategic plan. It also prompted participants to articulate the strengths of the groups in the Libraries and of the Libraries as a whole. A total of forty-four templates were completed, representing twenty departments and twenty-four groups. The templates were analyzed for high-level themes and specific examples of current work, strengths, and opportunities for alignment with university priorities.

Communication Strategy

Active communication with stakeholders was prioritized across all of the information-gathering activities. At each milestone, summary findings were shared with Libraries leadership, Libraries staff, and the university's Senate Library Committee. This provided a steady drumbeat of information sharing and allowed time for reflection, input, refinement, and buy-in. These active information-sharing opportunities were paired with a feedback form that was open to Libraries staff for anonymous or authored input at any time (see toolkit: UMN Libraries Feedback Form). The strategic planning team gave careful consideration to all input received through the form, and direct responses were provided when authorship was shared. For example, when a Libraries staff member suggested a recent OCLC research report on metadata, the report was added to the list of secondary resources reviewed during the environmental scan, and the individual recommending this report was contacted with this information in response to their original feedback. Additionally, when an anonymous individual requested opportunities for groups outside of formalized departments to provide feedback, the strategic planning team incorporated a process for teams to self-identify teams/groups for a response.

Together, the information-gathering activities provided the evidence to reinforce and refine the ideas that began during the kickoff retreat. Through stakeholder input, the strategic planning team was able to articulate the tangible and intangible qualities that the Libraries bring to the university and understand our users' needs and priorities. Through our environmental scan, we were able to bring in larger trends that are influencing the future of academic libraries which helped us set goals in alignment with the university's strategic plan. Ultimately, the evidence provided an important through line in our strategic plan that connected stakeholder input with our mission, vision, values, and goals so it resonated with our users, with the Libraries staff who would be called upon to implement the strategic plan, and with Libraries leadership who used the plan to create strategies in alignment with goals that will articulate the vision for our work and position the Libraries within the university and broader conversations.

Lessons Learned

As we recounted the two approaches in this chapter, we simplified what were two deeply involved and complex processes that came with a learning curve and lessons learned. For those interested in advancing their own evidence-based strategic planning process, we offer both a toolkit (Aspinall et al., 2022) along with the following advice to bring care and intention to your work and find the greatest return.

Leverage Existing Resources

As you plan the steps for evidence-gathering, you can leverage common tools and expertise available within your library and with external collaborators. This includes software, processes, information, and groups that can advance your work in meaningful ways. From our own experience, you could use survey software available on your campus, along

with tools like shared documents and citation managers to support collaborative work. You could also get access to institutional data to curate a survey distribution list, use video conferencing tools to record and transcribe focus groups, or use standing advisory committees as sounding boards to move your plan forward. Also remember to learn from your colleagues and collaborators who have done similar work either at the strategic planning level or in relation to an evidence-gathering task, such as a focus group or survey. Doing so will help ensure that when you are doing the work of gathering information, you are gathering the right information to advance your goals and doing it in a way that makes good use of limited resources.

Incorporate Evidence

Once you've gathered the evidence, let it inform your work. Through our processes and our resulting strategic plans, we confirmed the invaluable role that evidence plays in ensuring the institution is developing the best strategic plan for the local context and demonstrated the power of evidence in aligning our individual libraries with the larger institutional mission. By centering evidence in our strategic planning processes, we were able to draw a clear line between our final strategic plans and stakeholder input, larger trends, and institutional priorities. This can be seen from the high-level themes represented in our goals to the actual word choice represented in our mission, vision, and values. For example, "curiosity" was a theme that was highlighted throughout the University of Minnesota Libraries evidence-gathering activities, and it was brought into focus with the feedback from a Libraries focus group participant who shared that, "knowing that there was essentially no end to where I could reach, let me be more curious than if I thought my resources were limited." Together, the macro- and micro-level evidence gathered through the environmental scan, survey, focus groups, and staff feedback reinforced a theme around curiosity that was directly reflected in the Libraries' mission of powering curiosity, discovery, and connection. During the staff kickoff at Nimitz Library, a number of library staff called out specific challenges with building infrastructure. The strategic planning committee incorporated that by including specific language in the plan to improve library space and press for critical infrastructure modernization.

Take a People-First Approach

Above all, we recommend that you focus on the people behind the plan and the process. As you create a team, we advise that you assemble a team that demonstrates representation across your organization and that is resourced with the time and expertise to complete the project and utilize subgroups to advance work that needs to be done in parallel. We also found it helpful to make the team selection process as transparent as possible, to designate a chair with authority to seek resources and advocate on behalf of the team, and to create a team that has broad perspectives and skill sets. Before you begin the process, find clarity and agreement between the team and sponsors/leadership about your primary stakeholders so that evidence-gathering activities are appropriately scoped. Provide regular updates to key stakeholders at every milestone and offer multiple opportunities and mechanisms

to provide input and feedback. Be sure to demonstrate how feedback is being considered in the strategic planning process. Doing so will better ensure that people see themselves in the plan, which is invaluable for relationship-building and buy-in as the plan moves into implementation.

Reflection

While the approaches for creating an evidence-based strategic plan differed between Nimitz Library and the University of Minnesota Libraries, both libraries shared common lessons learned and, as a result of the information gathered throughout their processes, led both libraries to a strategic plan that reflected known needs and set an informed course for the future.

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