The ARL User Guide on Scenario Planning and its Value in Relation to Assessment Activities

Qualitative and Quantitative Methods in Libraries (QQML)

May 25, 2011

Martha Kyrillidou, Ph.D.
Association of Research Libraries

What's in a "Library"

- *A word is not crystal, transparent and unchanged; it is the skin of a living thought, and may vary greatly in color and content according to the circumstances and time in which it is used.*
  - --Justice Oliver Wendell Holmes

Thinking Strategically About Library Futures

- What is the central work of the library and how can we do more, differently, and at less cost?

- What important set of services does the library provide that others can't? What new roles are needed?

- What advantages does the research library possess?

- What will be the most needed by our community of users in the next decade? How is user behavior changing?

- What should our libraries aspire to be ten years from now? What are the implications of technology driven change?

- What are the essential factors responsible for the success of the library?

StatsQUAL®

DigiQUAL®

MINES For Libraries®

LibQUAL+®

ARL Statistics®

ClimateQUAL®

Scenarios

Balanced Scorecard

ARL Profiles

Return on Investment Lib-Value

Outline

- What is Scenario Planning?

- Why ARL engaged in it?

- How did ARL engage in it?

- What do the ARL scenarios tell us?

- How can they be used?

- What are the links between scenarios and assessment activities?

Three Elements of Scenario Thinking

- Breaking our of traditionally framed modes of thinking about the future is essential;

- Assuring that our thinking is truly aimed at managing a future that will surely differ drastically from the present; and

- Framing our thinking about the future around enough "roughly" correct scenarios that we are prepared for what happens in the end.

Scenario Thinking

Scenario Planning
Tool for helping managers deal with situations of significant uncertainty.

Scenario Project
Series of exercises where teams drill into the uncertainties faced today and in the future

Result
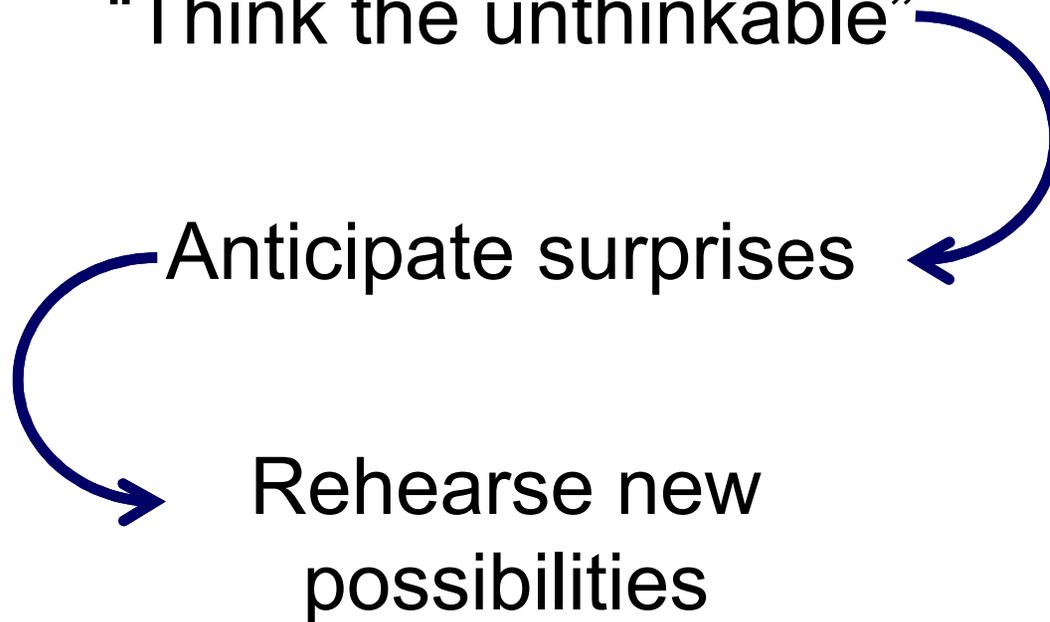A set of narratives describing three or four "alternate futures."

Scenario Thinking

Creation of alternate futures
encourages managements teams to

"Think the unthinkable"

Anticipate surprises

Rehearse new
possibilities

Scenario Thinking

Scenario set
A variety of possible futures and uses
containing the elements and conditions the
organization will face in the future

↓

**Must consider full
set of scenarios**

Strategic Direction: Transforming Research Libraries: Outcomes & Strategies

- Initiate visioning and scanning activities focused on emerging roles for research libraries in the processes of research, scholarship, and graduate education. Encourage and facilitate member engagement in adopting new roles in advancing research and scholarship.

  - ARL Strategic Plan 2010-2012

Acknowledgements

- Susan Stickley, Stratus Inc
- Karla Strieb, ARL
- Sue Baughman, ARL
- Charles Lowry, ARL Executive Director
- ARL Member leaders involved in this effort

- http://www.arl.org/rtl/plan/scenarios/index.shtml

Prepare for a DIFFERENT Future
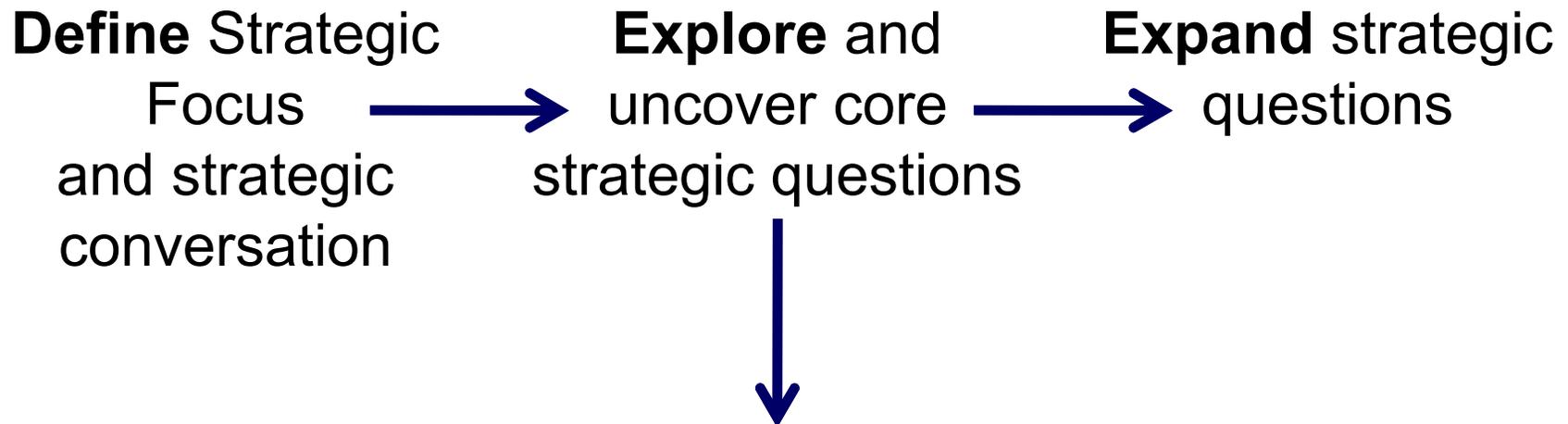

The ARL 2030 Scenarios:

A User's Guide for Research Libraries

October 2010

Association of Research Libraries
Stratus, Inc.

ARL's Scenario Development Project

Phase One - Data Gathering

Define Strategic Focus and strategic conversation $\longrightarrow$ **Explore** and uncover core strategic questions $\longrightarrow$ **Expand** strategic questions

How do we transform our organization(s) to create differential value for future users (individuals, institutions, and beyond), given the external dynamics redefining the research environment over the next 20 years?

ARL's Scenario Development Project
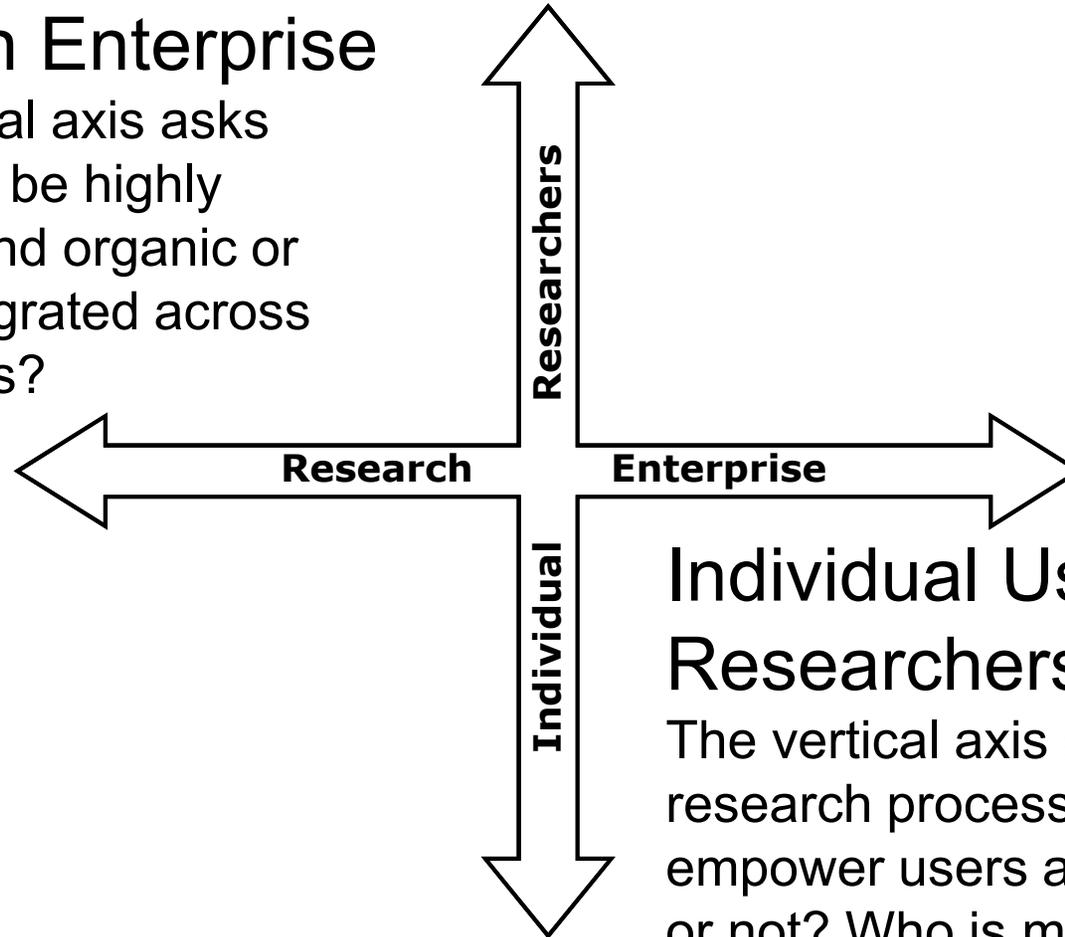
Refining the process:

Addressing concerns about maintaining and or building **relevancy** that can be **sustained** and **valued** by **users**.

Framing of Critical Uncertainties

Research Enterprise

The horizontal axis asks will research be highly distributed and organic or will it be integrated across organizations?

Researchers

Research | **Enterprise**

Individual

Individual Users and Researchers

The vertical axis asks will research process and product empower users and researchers or not? Who is most valued in the research process?

ARL's Scenario Development Project

The ARL 2030 scenarios allow members to opportunity to suspend disbelief and stretch beyond conventional wisdom about our future.

The Four ARL Scenarios

Scenario 1: Research Entrepreneurs
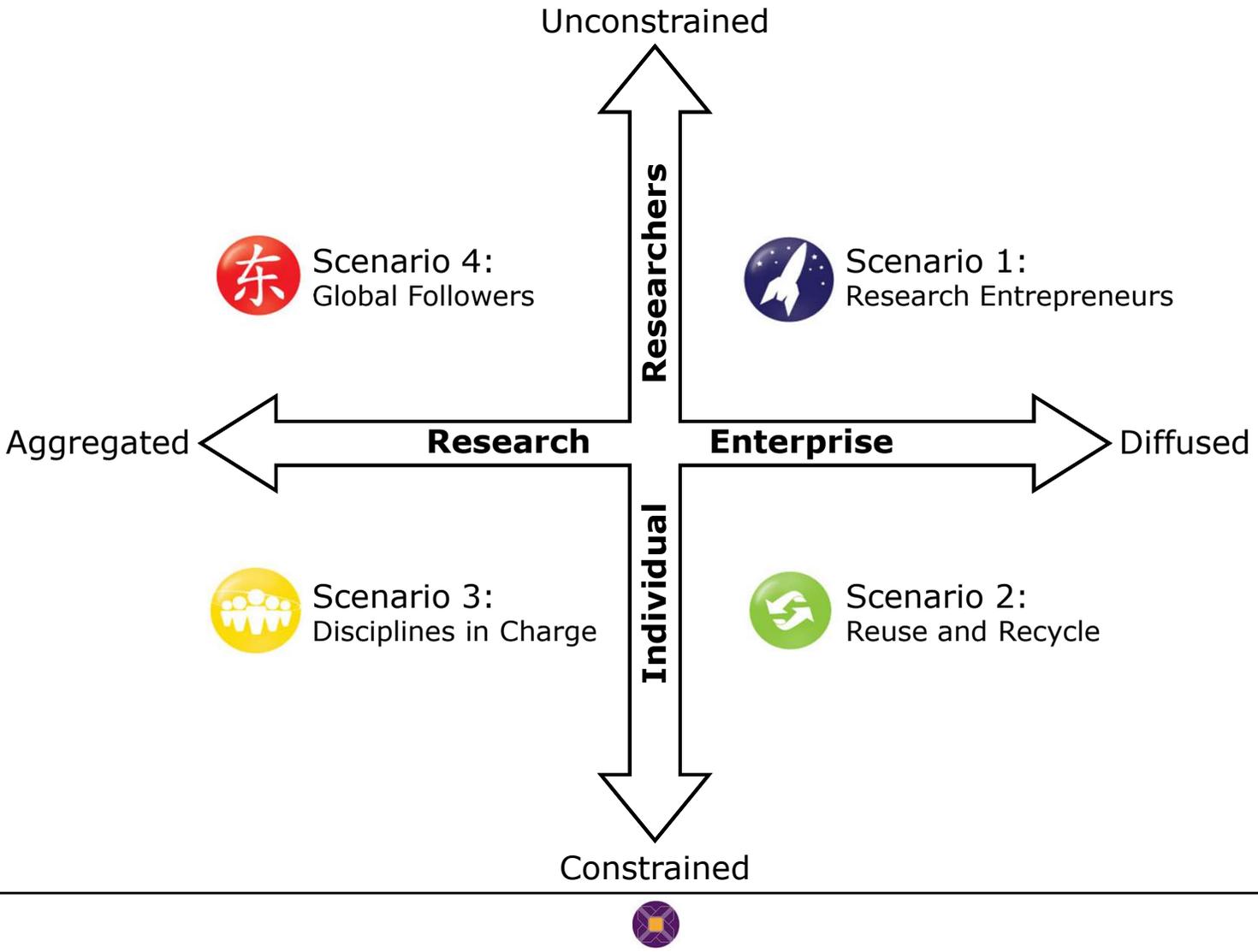
Scenario 2: Reuse and Recycle

Scenario 3: Disciplines in Charge

Scenario 4: Global Followers

ARL's Scenario Project

Unconstrained

Researchers

Scenario 4:
Global Followers

Scenario 1:
Research Entrepreneurs

Aggregated — **Research** — **Enterprise** — Diffused

Individual

Scenario 3:
Disciplines in Charge

Scenario 2:
Reuse and Recycle

Constrained

Scenario 1: Research Entrepreneurs

- Hannah Chen embodies the successful entrepreneurial researcher. She shapes her own career and research, flexibly pursuing opportunities as she chooses. Part of her edge comes from her personal willingness to follow new paths to her own development as a scholar, while she also demonstrates the benefits of canny partnerships with other researchers.

Scenario 2:
Reuse and Recycle

- Hannah Chen is one of the lucky few who has persisted in crafting a career as a researcher. Her ability to "follow the money" to clients who can support her rather mundane research projects, combined with her skill in fostering personal relationships with other researchers, has allowed her to craft a niche to support her research activities, although not to fully develop her research interests.

Scenario 3:
Disciplines in Charge

- Hannah Chen has found success by aligning herself with an emergent disciplinary research organization. She has leveraged her research skills, not in service of the discipline that trained her, but to play a leadership role in developing the research technologies that underpin another domain's research program.

Scenario 4: Global followers

- Hannah Chen's career has unfolded along somewhat traditional lines, while also tracking the shifting directions of the North American research enterprise. Throughout her development as a researcher, she has successfully aligned her research interests with the shifting grand research challenges identified by large-scale funding and leveraged emerging sources of research data. As a consequence, by 2030 her institutional allegiances have migrated beyond the borders of the US and Canada, although advances in technology and shifting cultural norms allow her to continue to live in North America.

How can you use the scenarios?

- Engage staff in strategic discussions
- Creating one strategic agenda from multiple futures
- Using scenarios to create vs test strategy
- Scenario planning, an interactive engagement process
- Scenario planning and Strategic planning
- Early indicators and ongoing monitoring

Value Scorecards

- What would the libraries values be under the different scenarios?

- Balanced scorecard work influences thinking about the development of value scorecard

- What might a value scorecard look like under the different scenarios?

http://www.climateq

ClimateQUAL: Organizational Assessment and Diversity

- Internationalization & globalization
- Organizational climate and diversity issues
- Human element
- Library staff and their perceptions of organizational climate
- What are the values we measure with the ClimateQUAL survey?
- http://www.climatequal.org

Thank you

martha@arl.org