

Strategic Planning for Reference in a Team Environment

The Preferred Futuring Model

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In 2003, realignment of library services brought about formation of interdisciplinary teams and the coordination of University of Southern California (USC) libraries' core services. This article explores how the reference coordinators have used the "Preferred Futuring" planning process as a foundation for successful planning for reference services in this environment. A brief profile of reference services at USC is followed by an overview of the function and operation of Preferred Futuring and its application at USC. The article concludes with a summary of lessons learned in hosting preferred futuring workshops and with a checklist of planning and preparatory steps for conducting a Preferred Futuring workshop.

In July 2003, the University of Southern California (USC) Library Resources and Services created a discipline-based team structure to accommodate USC's decentralized library system. Five core teams and interdisciplinary centers were identified: Arts and Humanities, Social Sciences, Science and Engineering, Undergraduate Learning, and Manuscripts, Archives, Rare Books and Languages (MARBL) Teams. Instruction coordinators, reference coordinators, and collection development coordinators were appointed to harmonize practice for core library services among interdisci-

plinary teams and to establish common service goals.

The primary purpose of this article is to explore how the two reference coordinators used the "Preferred Futuring" process as a foundation for successful planning for reference services in a team-based environment. Using feedback from Preferred Futuring workshops, reference coordinators were able to map out a strategic plan for achievement of the desired reference services' future through participation and input from the team members and other reference service providers.

The article begins by profiling the development of reference service at USC, which is followed by a description of Preferred Futuring's functions and operations. The article concludes by noting the accomplishments of the team-based planning process and identifying lessons learned from the case study. A checklist of planning and preparatory steps for conducting a Preferred Futuring workshop (figure 3) is also included.

REVIEW OF THE LITERATURE ON STRATEGIC PLANNING IN LIBRARIES

Strategic planning has quite a track record in the literature of business as well as in library and information

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science. Two books on library management and planning provide useful overviews on this planning model. Matthews' book, *Strategic Planning and Management for Library Managers* (2005), guides library managers towards a greater understanding of the role and attendant responsibilities of strategic planning while Hayes' book, *Models for Library Management, Decision-Making, and Planning* (2001), places strategic planning in the arena of social, ethical, and moral objective formulas or quantitative methods.¹

The literature on team-based management in libraries is less extensive although the journal *Library Administration & Management* has regularly published articles on this topic since 1993.² The more extensive work on the subject of team-based management in business is Fogg's 1994 book which linked team-based management and strategic planning.³

During recent times of turbulent organizational change, library managers have increasingly focused on the relationships between the academic library and its environment and stakeholders. This recognition has led to the use of environmental scans of the community, the campus, and the faculty and students as part of the planning process. Strategic planning also allows the library organization to assess internal strengths and weaknesses in relation to its external environment. By including these dimensions in planning, leaders are better able to create a vision of where the library will go and how to get there.⁴

Although the focus on vision and environment may seem to be at odds with the rational and objective process of strategic planning, there are planning methods that permit visioning to describe how the organization plans to achieve its mission. This is achieved by first creating a preferred vision, then linking this vision to the action-oriented strategic planning process. *The Change Handbook*, edited by Holman and Devane, identifies a number of such planning techniques that have both affective and rational components.⁵

Preferred Futuring is one of these proven methods for organizational change. This process adheres to general planning principles which recognize the need to gain commitment of staff by admitting them to the process. Any of a number of methods for producing organizational change can be effectively used, but the Preferred Futuring process introduced by Ronald Lippitt and adapted by Richard Dougherty and Carol Hughes has generated more excitement and commitment among USC reference providers than any of these other techniques.⁶ The concept of designing a Preferred Future instead of merely accepting the

future that could be predicted based on existing circumstances has been compelling for USC reference faculty and staff.

This case study of team-based strategic reference planning with Preferred Futuring at USC contributes to a developing literature on team-based management and planning through a visioning process such as Preferred Futuring.⁷

THE USC LIBRARIES REFERENCE ENVIRONMENT

USC is a large research institution located in the heart of Los Angeles with 33,000 students, 4,300 faculty, and more than 14,000 full-time staff. The library system supports the research and information needs of the USC scholars and consists of eighteen libraries with specialized collections located on the main campus. Historically, they have been operated, managed, and have functioned independently. Each library planned and offered information services based on their users needs and not necessarily in accordance with other subject libraries; therefore the reference services offered were decentralized. Librarians in each library set reference service parameters and standards and provided services to their users. As a result, the librarians were in some respects isolated from each other and not necessarily consistent in the service levels offered.

In 2003, realignment of library services brought about the formation of interdisciplinary teams, the coordination of libraries' core services through appropriate coordinators (reference, instruction, and collection development) within the team model, and the creation of five interdisciplinary reference service desks. In response to this new structure, coordinators for key library services were assigned: collection coordinators, instruction coordinators, and reference coordinators. The team model grouped individuals in specialized disciplines concerned with acquiring and providing access to discipline specific materials.⁸ Based on the team model, team members from each team now contribute to in-person, phone, e-mail, and chat reference services.

Virtual reference services at USC developed through participation in the Online Computer Library Center's Collaborative Digital Reference Services beta test in 2000–01 and QuestionPoint's beta test. USC's University Libraries launched the QuestionPoint Ask-A-Librarian Web-based e-mail and chat reference service in fall 2002. The original service team comprised seven service providers offering 22 hours per week of chat and 24/7 e-mail service with a 24-hour turnaround. By spring of

2004, the number of service providers had grown to twenty-two. The gradual but steady increase in service volume can be largely attributed to the strategic repositioning of virtual reference into our new team-based environment that has facilitated shared service provision.

The main goal for the organizational realignment was to meet the challenges of the University's Strategic Plan and the Information Services Division Information Pathways, especially the first three pathways:

- Pathway 1: Improve seamless access to customer-driven collection of print and electronic resources.
- Pathway 2: Create interdisciplinary centers as physical and electronic magnets for educational and research excellence, including facilities for graduate and professional needs.
- Pathway 3: Build an electronic "virtual campus" infrastructure that connects faculty and students for campus-based teaching, research, and services for reaching larger regional and global community beyond our campuses.⁹

The reference coordinators' mandate was to plan and coordinate reference services across the campus libraries and the interdisciplinary teams. Since the opening of Leavey Library in 1994, two different reference service models existed at USC Library system. On the one hand, subject libraries provided traditional reference and research services; on the other hand, the Leavey Library Information Commons presented a unique and an integrated service model providing research and computing consultation to library users from the same desk. The Information Commons reference service desk offers a tiered service model that pairs librarians and highly trained and skilled "student navigation assistants" to provide reference computing services in an integrated service environment. The student navigation assistants provide the first-tier assistance in reference and software applications in a 24/7 service schedule while librarians provide in-depth research consultation. The Leavey Library was conceived as a library for lower division undergraduates who would migrate to specialized subject libraries by their upper division years. Indeed, the notion of "gateway library" was the key concept in this service approach.

The main challenges for the reference coordinators were to plan and develop reference service goals for teams. The proposed goals would allow the four core interdisciplinary center reference service points, Doheny, VonKleinSmid, Science and Engineering, and Special Collections, to inte-

grate the benefits of the tiered reference model in Leavey Library within their unique environments. Also, the proposed plan would allow centralized service activities that included in-person, e-mail, and virtual chat reference. The Preferred Futuring approach to planning seemed ideal for envisioning integration of reference services in this complex environment.

PREFERRED FUTURING PROCESS MODEL

Created by Ronald Lippitt, Preferred Futuring is a planning model grounded in sound theory and a thirty-year history of successful practice. Lawrence Lippitt, Ronald's son, has detailed and documented the development of Preferred Futuring and the practical applications of the process as a leadership tool and a change model.¹⁰ In the last twenty-five years, Preferred Futuring has been used by many organizations in the public and private sector. In recent years Richard Dougherty has pioneered the use of this tool in academic libraries through his "Planning and Implementing Changes in Reference Services" workshops, and library conference presentations.¹¹

Lippitt details three critical phases in the Preferred Futuring change process: definition of the status quo, including accomplishments, disappointments, core beliefs, and future trends; definition of the preferred future state, capitalizing on organization strengths and visions; and, commitment to logical and predictable action planning, focusing on the link between planning and doing. The assumption behind this process is that linking preferred vision to committed actions creates a force that is stronger than resistance to change, thereby encouraging progress to be made (see figure 1).

Preferred Futuring is a highly adaptable process that helps bring alignment to an organization and generates staff enthusiasm and a willingness

Figure 1. Preferred Futuring Process Model

$$CD + SV + B + NFS > RC$$

Where:

CD	=	Current Dissatisfaction
SV	=	Shared Vision
B	=	Perceived Benefits
NFFS	=	No Fail First Steps
RC	=	Resistance to Change

Source: Richard Dougherty, *Planning and Implementing Changes in Reference Services: A Workshop* (Ann Arbor, Mich.: Richard Dougherty and Associates, 2002), 150.

to move forward. Whereas strategic planning is a rational, left-brain process, Preferred Futuring is a creative, right-brain activity. Yet the process itself, while flexible, is also well defined. It includes a series of eight steps that correspond to Lippitt's three change phases as reflected in figure 2.

In the process of defining the status quo, celebrating the past provides new staff with a sense of what senior staff have accomplished and also helps some staff let go of the past and move on to the future; assessing the present allows for identification of current dissatisfactions and grievances, which is important to gaining staff cooperation and support for change; stating core beliefs affords managers an opportunity to work with staff who are having trouble accommodating traditional values such as in-person reference with newer initiatives such as virtual reference.

The process of defining the preferred future helps participants expand their ideas of what is possible as a prelude to envisioning a preferred future. Staff are given the opportunity to identify images of the reference future they find pleasing (such as setting up a roving librarian service designed to take reference service to the café or the stacks). The objective of a preferred futuring activity is to help staff identify a course of action for which there is group agreement, rather than to point to the "proper" path to follow. Nevertheless, the products of the process can, if desired, be used as the basis for a formal strategic plan.¹²

PREFERRED FUTURING WORKSHOP

A Preferred Futuring event for an organization is preceded by the leadership's commitment to Preferred Futuring and by a preparation phase during which the futuring event is designed and other preparatory work is done.¹³ Preparation for Preferred Futuring is usually the responsibility of a small design team representing those who will attend the event from across the organization plus a facilitator who may be from within or outside the organization. This group provides necessary data on key issues and the dynamics present in the organization, develops a clear purpose and the set of desired outcomes for the Preferred Futuring event, and participates in developing the design for the event, which could last several days or take place in an abbreviated half-day format.

The primary tool used by this planning team is the Data-Purpose-Plan-Evaluation (DPPE) Model. This model provides a road map for the work of the team: collecting data about the organization or the situation, setting a purpose or goal for the Preferred Futuring event, creating a plan or agenda

Figure 2. Preferred Futuring Change Process

PF Change Process	PF Steps
1. Defining the Status Quo	1. Celebrating the Past 2. Assessing the Present 3. Stating Core Beliefs 4. Identifying Trends
2. Defining the Preferred Future	5. Expanding Horizons 6. Visioning Preferred Future
3. Commitment to Action	7. Action Planning 8. Celebrating Progress

Source: Richard Dougherty, *Planning and Implementing Changes in Reference Services: A Workshop* (Ann Arbor, Mich.: Richard Dougherty and Associates, 2002), 20.

for the event, and establishing criteria for evaluating the results of the event.¹⁴

During the Preferred Futuring event, members of the design team collect data at the end of each session or day to determine if any redesign of the remaining agenda is necessary. In addition, one or more facilitators monitor the logistics of the event, including instruction and setup for workshop activities. Within a few weeks of the Preferred Futuring event, the results of these activities are communicated back to the leadership group and often to the participants as well.

The Preferred Futuring process has been customized to the library reference services environment by Richard Dougherty in his series of workshops on planning and implementing changes in reference services. Within his Preferred Futuring framework, brainstorming is a key technique for identifying creative alternatives. His purpose in brainstorming is to generate as many uncensored ideas as possible, assuming that the greater the number of ideas, the greater the likelihood of finding an outstanding solution to the problem at hand.

The focus of Dougherty's workshop revolves around the following eight steps for transforming an organization:

1. Establishing a sense of urgency—identifying and discussing crises, potential crises, or major opportunities.
2. Forming a powerful guiding coalition—encouraging the group to work together as a team.
3. Creating a vision—developing strategies for achieving that vision.
4. Communicating the vision—using every vehicle possible to communicate the new strategies.

5. Empowering others to act on the vision—encouraging risk taking and nontraditional ideas, activities, and actions.
6. Planning for and creating short-term wins—recognizing and rewarding employees involved in the improvements.
7. Consolidating improvements and producing still more change—reinvigorating the process with new projects, themes, and change agents.
8. Institutionalizing new approaches—articulating the connection between the new behaviors and change agents.¹⁵

By proposing these eight steps which parallel the eight steps of Preferred Futuring (see figure 2), Dougherty empowers the process of envisioning and enacting a preferred reference future; the simplicity and practicality of this approach appealed to the leadership team and reference coordinators at USC.

PREFERRED FUTURING OPERATION

Preferred Futuring at USC has been used as a reference improvement tool, providing a way to gain stakeholder involvement and stimulate innovation for planning of reference services. Over a period of about a year, the reference coordinators conducted three Preferred Futuring reference workshops, which focused narrowly, and then broadly, on key reference service issues:

- Virtual Reference—February 28 and March 7, 2003
- Reference Services—October 17, 2003
- Information Commons—June 3, 2004

The workshops were paced differently. For virtual reference, coverage of the eight steps of Preferred Futuring was divided into two separate sessions. For the other workshops, the eight steps were combined to allow completion of the Preferred Futuring process in a single three-hour session. During the three-hour session, step one (“history—how did we get here”) was discussed briefly at the beginning of the session. Steps two and three (“current state—what is and is not working” and “values and beliefs—what are our core values”) were brainstormed within a single twenty-minute session in four groups of six participants. Steps four and five (“strategic trends/development—what trends may impact us?” and “vision—where do we want to be in 1–3 years?”) and steps seven and eight (“strategic goals—how will we get there” and “action plans—what will

we do”) were also batched and discussed in the groups in separate twenty-minute brainstorming sessions. Step six (“strategic goals—how will we get there”) was the only step to be brainstormed separately.

For each workshop, the coordinators experimented with a different method for setting the stage for Preferred Futuring ranging from pep talks to distribution of written materials before the session to a pre-workshop orientation session. Meeting in the same attractive environment with conversational seating and appealing refreshments set a comfortable tone for all the workshops. About twenty-four participants—the four members of the library’s leadership group, fourteen library faculty members and six library staff members—participated in the workshops. There were participants from each interdisciplinary team as well as representative staff from each library center. To maximize cross-team discussion, the coordinators assigned participants to a particular discussion group at the beginning of each workshop. Some participated in more than one workshop, so special care was given to grouping participants and rotating participants between and among brainstorming groups to maximize representation and contributions. Between brainstorming sessions, library leadership members rotated among the four groups so everyone had a chance to discuss issues with each of them. For each workshop, the coordinators set up prepared flip charts with the Preferred Futuring brainstorming questions mentioned above and then acted as facilitators and timekeepers during brainstorming sessions. After each workshop, they prepared and distributed an electronic record of the brainstorming output from the flip chart records.

By analyzing USC’s current state for virtual reference, general reference, and information commons, workshop participants identified what they were proud or sorry about in the current situation. Perceptions ranged from “prouds” that e-reference and the information commons were working to “sorries” that not everyone had the desktop-computing power to chat or the training needed to use chat technology. The events, trends, and developments assessment was an eye-opener because participants recognized that the skill sets for information technology are rapidly expanding and changing. There was a sense of urgent need to take action so as not to be left behind. The Preferred Futuring process of transforming vision into tangible action focused on brainstorming about all the things that currently existed that would help, and all that would hinder, to ensure successful future progress. Group consensus emerged around

three agendas that would “move the USC reference needle” toward success—development of reference competencies, tiered reference training, and exporting the information commons models to libraries outside of Leavey Library. The coordinators incorporated these priorities into their action plan for subsequent semesters.

PREFERRED FUTURING ACCOMPLISHMENTS

The application of the Preferred Futuring technique workshops resulted in valuable benefits. The reference coordinators acted as internal change agents collaborating with colleagues to identify and address the issues affecting the reference services. Pathway 1 of the Information Services Division Strategic Plan—to improve seamless access to customer-driven collection of print and electronic resources—emerged as the key strategic initiative for determining future reference initiatives. Sharing similar vision, goals, and concerns across teams helped create unity among team members. The most visible benefit was the participation of individuals at all levels of the organization. Senior administrators, reference librarians, team leaders, interdisciplinary center chairs, library managers, staff supervisors, and service coordinators actively engaged in the brainstorming process to vision and achieve the future of the reference services considering the existing constraints.

The technique was especially valuable for planning services in a team setting. Members of the teams came with agendas and discussed specific problems they faced. The open discussions and supportive collaboration empowered the colleagues by giving them a role in identifying the obstacles, suggesting solutions, and taking part in the planning and development of future services.

Each Preferred Futuring workshop (e-reference/chat, reference services under team model, and information commons reference services) revealed valuable feedback that helped to set the reference coordinators’ agenda and the USC Libraries’ reference services strategic goals for the next three-to-five years. The most common and overarching issue addressed in each workshop was training. The team model and the team affiliation required new responsibilities for team members. Each team member was responsible for providing reference, instruction, collection development, and outreach activities in their respective subject areas.

To facilitate staffing of the five core interdisciplinary center reference desks and to respond to the training issues, the reference coordinators offered a series of reference training sessions. Partici-

pation in these sessions was voluntary. The main goal of the training sessions was to provide both general and advanced knowledge of reference services and electronic resources to reference service providers. Additionally, to comply with follow-up training and formalize the training program with future expectations of staff contribution to reference services, the reference coordinators created the Tiered Reference Project Team. Membership consisted of the reference coordinators and representatives from each interdisciplinary team and the center.

The main goal of the project team was to plan and develop reference training for the public service staff and to provide baseline reference knowledge for staff and student assistants. One of the significant accomplishments of the Tiered Reference Project Team was the identification of the following four reference training modules:

- Module I: Baseline Knowledge of Public Services
- Module II: Baseline Knowledge of Reference Services
- Module III: Baseline Knowledge of Electronic Resources
- Module IV: Baseline Knowledge of Specialized Resources

The tiered reference model consists of three levels of service. The first tier prepares students and paraprofessionals to screen and refer the reference desk inquiries and to answer directional and informational questions appropriately. The second tier prepares staff (and occasionally well-trained students) to answer basic and ready reference questions. The third tier trains librarians to provide assistance with in-depth and advanced research questions. The Tiered Reference Training Modules were developed to match the tiered service model and to establish better understanding and shared awareness of the entirety of the reference service package. Since 2004, the Tiered Reference Project Team has developed and implemented training programs for Modules I, II, and III, and created Web tutorials (www.usc.edu/libraries/tutorials). The Module IV tutorials are under development and they will be implemented by the next academic year. Once completed and fully achieved, these modules will serve as the basis for seamless access to library resources and services and provide systematic and structured training for the reference staff.

Use of the Preferred Futuring technique is an especially effective way of exploring staff perceptions of training needs and setting training priorities. The

holistic participation and engagement of the team members with shaping the future of the reference services was a key factor in this success.

LESSONS LEARNED

By conducting three different in-house Preferred Futuring workshops, the reference coordinators learned a number of things that may be valuable for others who want to use this technique for planning services in their own institution. Clearly there is an optimum timetable for a workshop. Each workshop had a different schedule for the eight steps of Preferred Futuring. The E-Reference workshop was scheduled over two half-days and covered steps one through eight of the Preferred Futuring technique. Having the time to cover all of the steps is the advantage of a two-day format. The disadvantage, however, is that some participants may lose interest in returning to attend the second day of the workshop. The second workshop, Reference Under the Team Model, was scheduled for a two-hour session and covered only steps four through seven. Due to the brevity of the workshop, steps one through three of the eight steps were skipped, thus confusing some attendees who did not have background history and prior knowledge of the workshop. The third workshop, Reference in the Information Commons, covered steps one through eight but was conducted on a half-day schedule. Due to the newness of the Information Commons concept and to provide background history on the topic (as well as the workshop techniques), a pre-workshop orientation was offered to the participants. The last workshop seemed to be the most successful because of the half-day format and the full coverage of the eight steps of the Preferred Futuring process.

By comparing the three workshops, feedback comments showed that librarians and staff prefer to express their opinions in groups that include administrators. This was particularly apparent at the Information Commons workshop. During the Information Commons workshop, the executive library director and the three members of the leadership group attendees rotated from one group to the next during the brainstorming sessions to give the four groups a chance to speak with each administrator. Although dividing the eight steps into two sessions does not work as well as combining steps to get all discussion into one session, putting all levels of staff together to discuss common values and reference issues somewhat offsets that disadvantage.

Based on the experience gained by conducting the various format sessions, figure 3 provides

best-practice tips and practical steps for planning this kind of in-house workshop.

CONCLUSION

The Preferred Futuring process is an adaptable, flexible technique that is applicable in different

Figure 3. Practical Steps for Setting up a Preferred Futuring Workshop in Your Library

Planning steps and preparation prior to the workshop

- ✓ Identify workshop goals and desired outcome.
- ✓ Schedule a half-day event in a pleasant, spacious, large conference room that allows small group activities.
- ✓ Invite members from different levels in your organization, including librarians, support staff, and administration.
- ✓ Prepare workshop agenda.
- ✓ Distribute information regarding the workshop process steps to the participants prior to the event.
- ✓ Designate a facilitator and a time-keeper.
- ✓ Prepare a workshop evaluation form.

Process on the workshop day

- ✓ Provide refreshments.
- ✓ Prepare registration sign up and name tags.
- ✓ Bring flip charts, markers, and easels.
- ✓ Explain the overall workshop format, time allotment for each step, and the group reporting process.
- ✓ Divide the participants into small groups to facilitate brainstorming.
- ✓ Write each workshop step on a flip chart and provide some group discussion examples for each step.
- ✓ Facilitator(s) to move around to encourage all group members participation, encourage free flow of ideas, and to answer questions.
- ✓ Ask each group to assign a recorder and a reporter to report back the group's brainstorming results to the full audience.
- ✓ Allow a short break.
- ✓ Perform wrap-up.
- ✓ Collect workshop evaluations.

Process after completion of the workshop

- ✓ Collect the flip charts and brainstorming comments.
- ✓ Summarize, categorize, and digitize the comments.
- ✓ List the proposed action items.
- ✓ Prepare a workshop report.
- ✓ Distribute the final report to the workshop participants.
- ✓ Summarize evaluation feedback and report the suggestions.
- ✓ Offer a follow-up session to maintain continuity.

settings or contexts. The results generated from the three in-house workshops on reference topics (E-reference/Chat, Reference Services under Team Model, and Information Commons Reference Services) conducted at USC formed the action plans for the reference coordinators. It is interesting to note many similarities among the three workshop action plans, such as staffing, training, assessment, outreach/marketing, and technology requirements/challenges. Use of these Preferred Futuring workshops has become a part of the reference coordination function. The USC reference coordinators believe that Preferred Futuring is a particularly appropriate tool in a multi-team service environment for identifying the desired reference future and mapping out plans of action to achieve it.

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