
Crafting an Envisioned Future for RUSA

Looking Ahead to Our Strategic Planning Year

Joseph Thompson, RUSA President, 2014–15

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As I write this column on the airplane from Baltimore to Las Vegas for the ALA Annual Conference 2014, I'm finding that it's providing an excellent opportunity for me to reflect on where we've been as a division and where we are going. The flight serves as a great time-out from the constant feeling that that the next task must be efficiently accomplished so that the one to follow can be done with equal rapidity. The lack of an Internet connection probably helps too. Most of us don't fly every day, and likewise most of us who work in libraries don't have near enough opportunities to stop and reflect. That's truly what strategic planning is about. It's that rare opportunity that we normally only get as an organization every three to five years to take a time-out to review our accomplishments, learn from our mistakes, and sometimes redefine who we are. Moreover it allows us to agree upon a set of goals and objectives that will define where our attention and limited resources should be focused.

As our current RUSA strategic plan comes to a conclusion in June 2015, the upcoming year will offer us a great opportunity to reflect on RUSA and then to define how we will move forward providing our members the experience that they desire. It's an experience that I hope will encourage each one of us to value our membership so strongly through financial ups and downs and career changes that we choose to retain our memberships throughout it all. My hope is that it's also a member experience that invites people looking for a place and a space to be involved, so that they will choose RUSA over all of the other varied ways that we can choose to spend our limited time.

In this column, my first as RUSA President, I'd like to take the opportunity to review our accomplishments during the 2012–15 Strategic Plan, reflect on areas that our members have identified as important value experiences in the past, consider some larger trends, and discuss the current work of the RUSA Review Task Force. These will all influence the development of our new plan.

Before going on, I would be greatly remiss if I didn't thank our over nine hundred volunteer members who serve as chairs and members on all of our committees. The achievements of the association simply could not happen without you. I absolutely must also thank my predecessors, who have responsibly guided RUSA and contributed an innumerable number of volunteer hours in support of the association and our members. I'm especially grateful to our most recent past presidents Mary Popp and Kathleen Kern for their time and dedication and for always caring about doing the best job possible.

REFLECTIONS ON THE 2012–15 STRATEGIC PLAN

There are two reports related to our current strategic plan that provide us with very useful snapshots regarding its implementation.

An ad-hoc committee comprised of Doris Ann Sweet, Sara Morris, and Sarah J. Hammill followed-up on a Big Think discussion at Midwinter Meeting 2013 by writing “Comments & Suggestions on How to Implement Some of the Big Think Ideas into the RUSA Strategic Plan.” This document was shared at the Annual Conference 2013 and was later updated by Kathleen Kern at the time of Midwinter Meeting 2014. In it, the committee reflected on the content of the plan and compiled recommendations organized under three general categories: membership engagement, increasing the value of membership, and improving leadership training.

One of the key recommendations under membership engagement concerned the RUSA website, in that we must make sure that it clearly helps potential new members easily figure out the structure of the association. They also recommend that the website be the first place librarians go to find out the latest research, trends, and ideas in reference and user services as well as find out the basics of what each committee is doing. Most of the business of RUSA, however, should continue to be located separately. My hope is that the upcoming strategic planning process will help to further clarify the purpose of the RUSA website, and that the RUSA Publications and Communications Committee will be able to continue to make great progress on this over the coming year. A new RUSA Trends Task Force has also been established in June 2014 that will develop methods for feeding broader content related to reference and user services trends to the RUSA website.

To further advance the value of RUSA membership, the committee proposed expanding RUSA’s course offerings to include free and low-cost webinars. This effort has now been put in place and is being coordinated by RUSA’s Professional Development Committee. The immediate response from participants has been very positive. In the 2014–15 year we plan to expand RUSA’s online offerings through the RUSA Free School initiative, which will allow students in LIS programs opportunities to gain experience as they create and deliver online content using RUSA’s existing Adobe Connect platform. In addition, the committee recommended that we further develop the social events offered at the Midwinter Meeting and Annual Conference to give greater opportunities for members to meet their RUSA colleagues, make connections, and advance their careers. The RUSA board consequently approved supporting the RUSA 101 event at Annual Conference with food and beverages, as well as the transfer of the monetary support that historically had been allocated to individual committees (and usually unused) to the sections in support of their member recruitment and retention initiatives.

The committee went on to address leadership issues. They recognized that term limits as they are, allowing one person to chair a committee for no more than two years, work well

in allowing new people to take on leadership roles. However, this turnover can unintentionally result in a lack of continuity. RUSA is working toward addressing this problem in a few different ways. One is to reinstate a face-to-face orientation discussion at the Annual Conference to complement the online orientations that take place later in the summer. We have also created an e-mail discussion list for the RUSA section vice chairs and RUSA vice president to regularly ask questions and share information. The weekly RUSA office hours allow both active and new members to casually ask questions and receive support. Above all else, the committee noted that most of us who are now active RUSA members started through the direct encouragement of a colleague. The personal touch is extremely powerful, and we need to make sure we are cultivating our next generation of RUSA leaders through these one-on-one interactions. From my own personal experience, I can definitely say that I am an active RUSA member now due to one of those personal interactions. I am extremely grateful to Linda Fenster and Ann Frenkel for approaching me at the end of a program at my first ALA Annual Conference (Toronto, 2003) and asking if I’d be interested in joining the RSS Cooperative Reference Services Committee. We each need to make sure that we are making use of every opportunity of this type.

Doris Ann, Sara, and Sarah’s work fed directly into the review of the current strategic plan in the fall of 2013, which was coordinated by Mary Popp and Erin Rushton. They communicated with each committee and section to determine what progress had been made on accomplishing the current plan’s objectives. Strategies and activities were then associated with each objective, providing a very useful snapshot on how we were fulfilling the intent of the plan. While much of the work to enable members to participate online via meetings and online learning has been extremely successful, member recruitment activities showed opportunities for further development. The free webinars offered by the Just Ask committee stood out as desirable offerings to members, with registration for each filling within days.

LOOKING AHEAD TO THE 2015–18 STRATEGIC PLAN

Over April 28–29, 2014, I was fortunate to have the opportunity to attend the *ASEA Symposium for Chief Executive and Chief Elected Officers* in Chicago, Illinois. Glenn Tecker, Paul Meyer, and Leigh Wintz of Tecker International presented. Kathleen Peiffer (ASCLA Vice President/President-Elect) and Susan Hornung (RUSA Executive Director) also attended.

Five overarching topics were addressed at the symposium:

1. Leadership in Contemporary Organizations: Your Model of Leadership; The Special Nature of Voluntary Organizations; Your Evolving Environment; Big Picture Trends
2. Leading Collaboratively: Leading Together; Leader Work Preferences

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3. Leading People: Roles and Responsibilities; Building a Successful Relationship; Volunteer Engagement
4. Leading Strategically: Planning Strategically; The Strategic Board Agenda
5. Leading Change: The Nature of Change and Transition; Creating the Desire for Change

There was an incredible amount of content packed into two very short days. Out of all of it, I felt that there were seven points that were most relevant to our current situation at RUSA, and I would very much like to see these ideas incorporated into our new plan.

1. Why people behave the way they do in volunteer organizations is based on the following principles:
 - a. What is perceived is reality.
 - b. Perceptions are based on available info (not necessarily timely or accurate info).
 - c. In the absence of information we assume.
 - d. Behavior, no matter how crazy, has a logical basis.

I believe we do best when we fall on the side of oversharing information with our members, rather than leave vacuums that will be filled with misinformation. It's our responsibility to build bridges between the views of those who are making decisions in leadership roles and the general membership who do not have access to the same streams of information.

2. We need to ensure that we are keeping our stakeholders informed as to why we have made our decisions. Share the intent and motivation behind the decisions made based on member value. This is a mindset that the most successful leaders practice. What we are seeking to accomplish is always based on the outcome we want to achieve: the benefit to mission or member.
3. We discussed the prevailing perception that younger people are not interested in becoming involved in membership organizations. The research actually suggests otherwise. Involvement is of interest to newer generations. Generation Y actually looks more like the baby boomers in terms of their desire for involvement. They recognize the value of belonging. For at least ten to twenty years, children have become accustomed to working in small groups and consensus building. The challenge is that there are lots of ways to be involved. They want to be involved but may not want to be involved in the ways that you desire. Young people generally want to be involved in smaller chunks. If we looked at our involvement by project rather than title or committee, that could help. I learned two key things from this. First, we need to make sure to do all that we can to target our recruitment efforts at twenty- to thirty-year-olds. Second, we need to consider if the standing committee structure is most conducive to participation by younger members. How else can we organize ourselves to get maximum participation and make significant accomplishments?

4. The number one reason people want to retain membership is if they are involved. It's very difficult for someone to not pay their membership dues if they are actively participating on a committee or visiting the association's web-site every day. The second primary reason for people to retain their membership is if people in the association helped them grow in their career. If so, they will be a supporter for life. Make sure that your members are part of something bigger than themselves. Members need to feel like owners and a part of what is happening in the association. They won't remain invested if they are only made to feel like customers using the association's services.
5. The presenters highly recommended that the board perform an annual self-evaluation. Additionally, it was recommended to ask some key questions after every substantial board meeting: Did we follow our agenda? Did we discuss the right things? How did we treat each other? What are we going to do differently next time? These are questions that we can certainly ask of ourselves across all of RUSA in the few minutes at the end of every meeting.
6. Fifty percent of a board's decisions will be wrong within twenty-four months because we are always developing a new context and gathering new information. We need to be ready to change our mind. Nimbleness is the absence of barriers. This point brought to mind our RUSA Rebranding initiative that had begun following Midwinter Meeting 2014. Not that rebranding was a wrong decision, but the team who reviewed the RFPs realized that the timing for rebranding would work better either as part of the upcoming strategic planning process or after it entirely. If strategic planning is to allow us to revisit, or reaffirm, our core purpose and core values, then the rebranding effort must follow so that it properly reflects who we are.
7. Every association needs a distinguishing value proposition. It's not just about one meeting or one conference. It's about the long term commitment and about the series of events and experiences. There are plenty of other places where people can go for one-up opportunities. We need to show that we are committed to our members when they join the profession and when they leave the profession. Show that nobody else can provide this same value proposition.

In addition to what we are learning about larger trends in the work of associations, ALA itself is looking at larger trends that will impact the future of library service. Both of these elements will provide useful inputs for our strategic planning. I would encourage all of our members to read the report that was generated from the ALA Summit on the Future of Libraries: *Libraries from Now On: Imagining the Future of Libraries*. The summit was held at the Library of Congress over May 2–3, 2014 (<http://connect.ala.org/node/223726>).

There were several ideas in the report that are immediately relevant to RUSA. Among these, participants brought forward a need to rebrand libraries, specifically in that we need to

increase awareness of the value of libraries with an emphasis on stories about how they have made specific impacts on individual users. What can RUSA do to help tell meaningful stories about the impact that reference and user services librarians are making? Later in the report, there is an observation from one of the groups that “the ability to identify the real reference question and find the right answer may be of limited value in the future.” I think this observation serves as a reflection of the perception that reference librarians are still primarily standing at a desk waiting for questions as they might have done thirty years ago. This goes back to the need for us to perhaps not only work to rebrand our division, but our field of the profession itself. The reason that this point was brought up is indeed a valid one however, in that it encourages librarians to further develop higher skills that will help them to play more advanced roles in facilitation, teaching, coaching, entrepreneurship, and as advanced users of technology.

Let’s look at what’s happening within RUSA that is taking us forward into strategic planning. Currently there is a significant effort underway that is helping us to assemble some of the key data that will establish some of our core assumptions. Following up on the work of the work of the RUSA Structure Taskforce and the RUSA Web Conferencing Task Force, the RUSA Review Task Force began its work following the ALA Annual Conference 2013. This RUSA Review Task Force has been productive and is continuing its work as of this writing. I especially want to thank the cochairs Chris LeBeau and Diane Zabel for their leadership and for preparing a preliminary report for the RUSA Board for the ALA Annual Conference 2014. The task force’s charge is to look at RUSA’s mission, structure, efficiency, member recruitment, and member engagement. The goal is to make recommendations for creating “a more streamlined, focused, proactive, responsive, and sustainable organization.” The committee’s work also dovetails nicely with ALA’s strategic initiative to create a “welcoming, inclusive, engaged, and supportive organization.”

The committee has reviewed membership statistics for RUSA, RUSA sections, other ALA divisions, and ALA overall; reviewed RUSA’s strategic plan, past membership satisfaction survey, section reviews, and reports prepared by relevant ad hoc committees (such as the RUSA Structure Task Force); and gathered informal data through having task force members “Ask 10 People” about why they belong or don’t belong to RUSA. The cochairs conducted telephone interviews with current and recent past RUSA presidents and section chairs to ask for their observations on RUSA’s mission (should RUSA expand or narrow its focus?), efficiencies (are there some standing committees that should be eliminated, made ad hoc, or re-envisioned?), the possible creation of Interest Groups; suggestions for the RUSA office, strategies for boosting membership, strategies for engaging members, and the pros and cons of a possible name change.

As of this writing, *The RUSA Review: Summer 2014 Survey of our Members* was posted online, and great ideas were already being submitted from members. The survey was publicized on rusa-l, section electronic discussion lists, and at

the 2014 Annual Conference and was scheduled to be open through July 11th. The survey asked seven questions:

1. We are considering a new kind of community within RUSA, called Interest Groups. These groups would be RUSA-wide communities that are organized around popular, current topics, enabling members from across RUSA to connect with others who have shared interests. These groups can hold discussions, e-mail forums, programs, and other events. Some topics for Interest Groups may include but are not limited to marketing/outreach, programming, library spaces, and usability. Should RUSA explore Interest Groups?
2. Over the past two years, what conferences outside of ALA have you attended, or from what organizations have you taken webinars or pursued continuing education? Briefly, what did you find valuable about these opportunities?
3. What is different about RUSA or unique to RUSA that you have not found in any other association?
4. Check all items that help to retain you as a RUSA member.
5. Please tell us where RUSA should put its focus moving forward.
6. Do you think the name “Reference and User Services Assn” clearly describes the scope of the association, or is it time for a name change? RUSA comprises six sections: CODES (Collection Development and Evaluation Section), BRASS (Business Reference and Services Section), HS (History Section), MARS: Emerging Technologies in Reference, RSS (Reference Services Section), STARS (Sharing and Transforming Resources).
7. Do you have any further comments you wish to share about RUSA?

I want to thank everyone who was able to respond to the survey. Once the survey is closed, the task force will compile the results and include this information in the final report.

The next steps, as of this writing, are to bring together members of RUSA Board and RUSA Organization and Planning Committee to create a Strategic Planning Coordinating Task Force. The group will work to develop an RFP for strategic planning consulting services. In addition to using the data that has already been gathered, we are tentatively planning on using the face-to-face opportunity that ALA Midwinter Meeting 2015 in Chicago will offer for a facilitated discussion with the members of the RUSA Board. A targeted online survey of all RUSA members during the process will provide us with additional information about what our members desire from their RUSA experience. This timeline will allow us to complete a new plan before the ALA Annual Conference 2015 in San Francisco.

I want to thank everyone who will be contributing to the strategic planning process and taking RUSA forward. These are exciting times, and we have the opportunity to craft a new vision for the association that will impact how our members engage with RUSA for years to come.