

## **Strategic Planning at Indiana University**

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You are likely aware that IU is in the process of drafting and implementing a system-wide Bicentennial Strategic Plan based on recent campus strategic plans. I hope everyone provided input. There is a lot of planning going on right now. Both the Robert H. McKinney School of Law and the Ruth Lilly Law Library updated their strategic plans in the last year or so. Additionally, those of us serving on promotion and tenure committees advise librarians going up for promotion or tenure to create plans to meet the criteria and to demonstrate the upward trajectory expected by the reviewing committees. The planning process at each of these levels is unique, but they share certain commonalities.

### **Why Strategic Plans Fail**

There is a basic question as to whether strategic plans serve a useful purpose. The answer to that question depends entirely on the interest and engagement of the parties involved. Recently I was talking to a dean, who shall remain nameless, and he expressed the opinion that strategic plans were a “necessary evil.” Many of us have had similar reactions because of past experiences where weeks of effort in crafting a document were wasted because the plan was never implemented. Others have scars where the strategic plan was perceived as a scare tactic used to force unattainable changes or be faced with obsolescence. Finally there are those that feel that consistently taking care of business and doing the best they can on a daily basis is sufficient.

### **Succeeding in the Strategic Planning Process**

The best planning process I have ever experienced happened with the IUPUI Strategic Plan ([Our Commitment to Indiana and Beyond](#)). Executive Vice Chancellor Nasser Paydar formed an exhaustive number of committees and held open forums over several months to craft the initial document. The real key to success was that the planning and prioritizing didn’t stop with the draft. The document continues to evolve, where ongoing input is sought and valued. While campus administration is ultimately in charge of determining the implementation, there is a greater level of faculty involvement and transparency in the process than I expected.

Untenured librarians need to plan strategically for success as they build their dossier. Starting early with a plan can ease the path later on. As with other strategic plans, getting input from many participants (librarians and other faculty colleagues alike) is essential. While each of us is unique, modeling can help. Reviewing past successful dossiers for ideas is quite useful for this.

### **Lessons Learned**

I had the opportunity to participate in the strategic planning process at several levels and in different roles. Here are some lessons I recommend for the organizer:

**DO**

- Start with an open mind
- Provide sufficient time for feedback and revision
- Get stakeholder participation from the beginning

**DON'T**

- Assume lack of response is a confirmation
- Go overboard proposing a large number of extreme changes in a first draft
- Send out a new draft with every minor revision

More frequently most of us are participants in the planning process. Here are some lessons I recommend as the stakeholder:

**DO**

- Read carefully before responding
- Provide constructive feedback
- Recommend specific changes in language
- Be prepared to give feedback on short notice
- Understand that there are other points of view you may know nothing about

**DON'T**

- Assume you can't make an impact
- Whine
- Be vague

**Conclusion**

The larger the organization, the more there is a need for a cohesive strategic plan. But even at the personal level, a strategic plan can provide substantial benefits. The strategic planning process may sometimes seem to be a Sisyphean task, but it can produce substantial benefits with proper planning, engagement and follow-through.