

# "Planning – Mechanisms, Perspectives and Outcomes: The University of South Carolina Information Organization Since 1993"



## PRESENTERS

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A unified organization for information services, systems and resources serves the learning community at the University of South Carolina - Columbia. The session will address 1995 and 1999 strategic planning efforts. Points of commonality will be highlighted along with a few contrasts. The session will feature offshoots to planning, the fate of recommendations, and changes in attitudes over time. We will touch on issues of differing professional cultures and of the tensions of change. A key theme will be the amount of progress gained in division unity as reflected by the perspectives of directors, line managers, division staff and client groups.

Outlined below is the essential background to the talk, which will be delivered by the chairs of the two planning efforts.

## QUESTIONS

Given that the two efforts took place four years apart, a series of basic questions arises. How are the processes alike in their approach? (The division has persisted in its general purpose and form – what aspects of the organization continue to need work?) How do the planning processes differ? (What impact have time and events had on the provision of services by areas of the division?) How much authority was given to the planners and, ultimately, to their plan? (The recommendations are broad and thorough going – but are they binding?) What has been the relationship between planning and the structure of the organization? (Reorganization has taken place in an ongoing fashion – what has it had to do with the plan?)

## CONTEXT

Over 1994 / 1995 academic year, University of South Carolina examined services and operations in the division in a wide ranging strategic planning effort (2). Recommendations were made and acted on as a result of the planning process and a handful of critical values and guidelines have emerged. Either as a direct result or in parallel, other streams of activity also took place: service model

analysis, integrated action & budget plans and targeted task force efforts. During the 1998 / 1999 year, a second strategic planning has begun and is reaching its final phase. A chief goal of planning has been to foster coherence in the Division. For the internal assessment, a sense of the whole has been emphasized beginning with broad staff participation in the planning processes themselves.

The merger of University Libraries, Computer Services and Distance Education and Instructional Support has yielded a full-time staff of four hundred (out of a total university faculty and staff numbering around four thousand).

## **PROCESS**

Planning has started in each case with team-building for a steering committee composed of several members each from the three major areas (Computer Services, DEIS and University Libraries). A specialized ARL consultant has facilitated at critical junctures during the subsequent months. The steering committees devised and executed a process divided into general phases: setting a planning framework; acquiring information & deriving recommendations; and clarifying & presenting overall recommendations.

Both efforts have followed the same general outline –

### Establishment by the Vice-Provost

- Purpose and guidelines given, e.g., budget restrictions for any proposed recommendations; importance of administrative economies; respect for all staff
- Steering committee (drawn from all areas) constituted

### Discussion (Focus) groups

- Controlled discussion groups in which staff were asked the strengths and weaknesses of their departments and the Division ("what works" and "what doesn't work"); handled confidentially

### Director input

- Written or verbal opportunity to discuss services, projects, threats, difficulties, success stories

### Derivation of recommendations

- Filtering of Task Force recommendations; proposals based on distilled Focus Group views

The first planning report (2) was followed swiftly by two efforts: a study of computing issues (fall '95) and a division wide analysis of all services and operations in what amounted to a definitive planning phase (spring '96).

## **DIFFERENCES in PROCESS**

*Visioning:* Plan I had an initial kick-off retreat: over forty 'key people' were invited to a facilitated discussion on the purposes the planning should address, taking imaginary snapshots of what the Division would be doing in the year 2000.

*Review of services:* Plan I solicited the Dean's direct reports to provide full details of their services. *Task forces:* Plan I commissioned task forces to conduct studies of selected topics, e.g., staff development, personnel practices, technology & standardization, multimedia *Line management perspectives:* Plan II steering committee members conducted interviews with a sampling of line managers and supervisors. *Directors' views:* Plan II has included individual interviews with direct reports of the Vice-Provost

## **UPCOMING EVENTS in Plan II**

Monitoring: A monitoring device to track progress on recommendations

Alterations to service models: proposed changes based on fresh analyses of division services

Handling of recommendations: Final disposition and implementation

## **ISSUES**

Similar issues have come up during both planning processes. A selection of the most important is presented below:

Perspectives How do perspectives differ at the director level, the level of middle management, the front-line staff? What about the perspective of the Vice-Provost? And what about the customers' perspectives?

Cultural differences Do difficulties in communication and concerted action arise from the 'temperament' or cultural variation of the different occupational specialties in the division?

Planning vs. operations Planning occurs in a separate, sequestered 'envelope' from day-to-day operations. How can the two intersect gracefully to produce workable and effective decisions? When warranted, how is restructuring accomplished? (3)

Priorities / decisions For a large unit, how are priorities set? What are effective modes of communication, exchange of perspectives and decision making?

1. Sullivan, Maureen and Calhoun, Patrick. Strategic Planning for A Library, Computing, and Media Support Organization, CAUSE '95 Proceedings, pp. 1-6- 1 to 1-6-6.
2. The Division Plan 1995. University of South Carolina, Division of Library and Information Systems (internal document), 1995.
3. The subject of an upcoming conference during fall, 1999 at the University of South Carolina on information organizations in higher education.