
LibGOAL

Plotting your Personal and Organizational Goals

OVERVIEW

What are the essential competencies that future library professionals will need as individuals, as team members, as members of a university, and as citizens? How can they identify personal and organizational competencies to guide their education and professional development to become proficient in these competencies?

LibGOAL is a card sort planning activity for teams of library professionals that can help them to identify, discuss, and align their priorities for future personal and organizational growth.

GETTING STARTING AND WHAT TO EXPECT

Think of LibGOAL like a game. While it might seem a little overwhelming the first time you play, once you learn the pieces (competencies), the game boards (relevancy/proficiency plot and action plan), and the rules (step-by-step instructions), then begin to play, the competencies will start to fall into place and a picture of your team's current and future skills will begin to take shape.

GAME PIECES: COMPETENCIES

We imagine the librarian of the future as a "T-shaped" person who has specific vertical areas of expertise based on their position along with horizontal skills and knowledge that cut across roles and departments, enabling collaboration. LibGOAL brings these two sets of competencies together in order to map their relationship. Allowing the two sets of competencies to be plotted at one time provides the tool with more flexibility, since verticals can be specific to a role (e.g., leadership, assessment) whereas the horizontals can apply to all roles.

For example, horizontal competencies that apply to most library roles and across an entire organization can include: Accountability (participate actively and hold ourselves accountable, show up, show initiative, and show results.); Creativity (developing creative solutions to challenging problems); and User Orientation (prioritizing the user's experience at the library).

Vertical competencies that relate to specific job functions like teaching and learning can include: Pedagogy and Andragogy (understanding the practice of teaching); Curriculum Development (equally effective developing learning content and curriculum for F2F and online learners); and Learning Assessment Methodologies (understanding and applying various methods for assessing learning).

LibGOAL

Card Sort Activity

LibGOAL is designed to simultaneously assess as many horizontal competencies as you want along with one set of vertical competencies specific to a role or department.

Horizontal Competency Scales	Horizontal Competency Contexts	Vertical Competency Types
Self	Strategic	Leadership
Team	Professional	Assessment
Library	Technical	Teaching and Learning
College/University	Interpersonal	Data Science
Society/Profession		Scholarly Communications
		Makerspaces
		<i>...More to come!</i>

GAME BOARDS

LibGOAL includes two game boards. The first board is a card sort activity grid on which to plot competencies across relevancy and proficiency. The second board is a next steps action plan that will help individuals and teams to plan for both immediate and long-term professional development.

Rules of the Game

1. First warm up by plotting competencies for one of the sample academic institutions included with the activity. This should help you to understand how the game works before you apply it to yourself, your team, and your organization.
2. Next, plot the competencies for your team.
3. LibGOAL is designed as group activity; think about your competencies from a team perspective and then apply them to yourself.
4. Work in small groups. LibGOAL works best with five players or fewer along with a facilitator.
5. Play one color at a time, starting with the horizontal competencies and then moving on to the vertical competencies that best match your team's roles and/or function(s).
6. LibGOAL's categories are flexible and loosely grouped, so try not to overthink them, which might stall your progress through the game.
7. Limit each round to plotting the top five competencies in each category.
8. Your feedback on LibGOAL is welcomed--help us make it better!

Detailed Instructions

To complete the card sort activity, participants will prepare, reflect, sort, evaluate and act.

STEP 1: PREPARE!

To get started you'll need a physical set of competency cards and a sorting plot - both can be plotted on your own or use a kit that already exists, say borrowing from a peer institution.

- The cards file can be downloaded libgoal.org and printed on cardstock
- The plot file can be downloaded at libgoal.org and printed on bond paper or can be projected (or drawn) onto a whiteboard. The plot is intended to be 24" by 36" so that the board doesn't get too crowded and competencies don't pile up on top of each other.

You'll want to inform and align the activity with the goals of your institution, library organization, team, and individual goals. It thus works best to gather those documents, review them in advance, and come prepared with your major goals and themes in mind. For example, your institution's goals might include increasing student retention or faculty publication. Your library organization's goals might include improving user experience or developing a systematic assessment plan. Your team's goals might include improving teaching or increasing outreach to faculty. And your individual goals might include developing a better understanding of learning theory or instructional design.

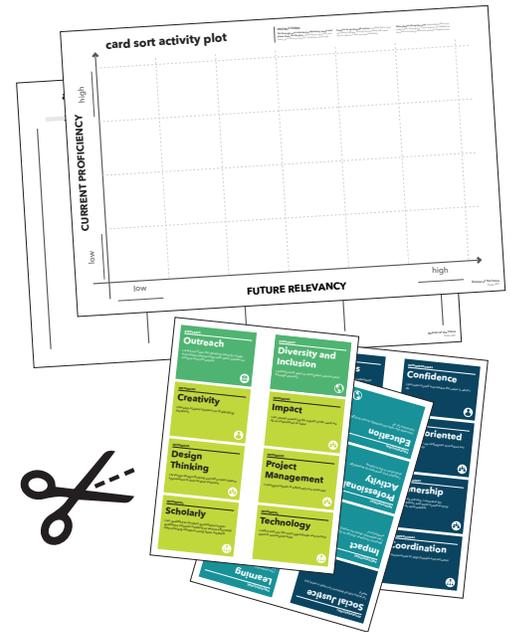
You'll also need some supplies: sticky notes, tape, scrap paper, and pens/markers in order to annotate your plot and capture your insights.

Keep in mind that LibGOAL is a group activity and the discussion it generates is as valuable as the outcome. We recommend five or fewer participants per plot; if you have a larger group, you can simply do multiple sorts then compare, discuss, and combine as appropriate. When you're choosing participants, keep in mind that horizontal competencies can be plotted by a group with a variety of roles but vertical competencies should relate directly to the functional categories within your library.

NOTE TO FACILITATORS:

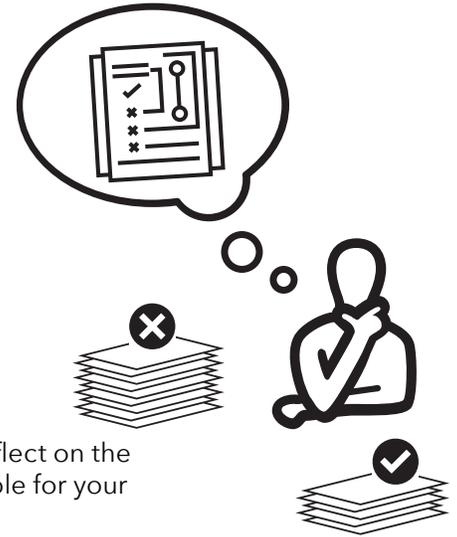
Limit the number of cards in use at one time. Imagine taking a picture of the plot at the end of the activity--you don't want one competency covering another.

When participants wear multiple hats or play multiple roles, just go through one "hat" at a time; don't plot scholarly communications on top of teaching and learning, even if one person is responsible for both.



Instructions continued

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STEP 2: REFLECT! (15 MINUTES)

Planning without context isn't valuable. So once you've prepared, you need to reflect on the context of your organization so that you are sorting competencies that are valuable for your role(s) and within your organization.

To do this, we recommend reviewing the institutional strategic plan, the library strategic plan, peer comparisons, environmental scans, and any other documents that convey a sense of future vision and direction.

NOTE TO FACILITATORS:

Start by summarizing a few of your institutional, organizational, team, and individual participant goals and write these on a flipchart or whiteboard to generate a shared understanding.

If there is no strategic plan or explicit direction on the future, take a few minutes to brainstorm your ideas for what an implicit future direction and priorities might be. For example, there may be implied goals suggested by remarks from your leaders, budget priorities, internal working groups, ongoing initiatives, and more.

STEP 3: WARM-UP SORT (15MINS)

1. Review the overview of the sample academic institution that most closely fits your institution's profile and select the top five competencies in each category that you want to review.
2. Plot the horizontal competencies one category at a time, discussing each competency and recording any key takeaways from the discussion as practice for your team sort.
3. Plot one vertical category, discussing each competency and recording any key takeaways from the discussion as practice for your team sort.
4. Take a picture of the plot to use as an example for your team sort.

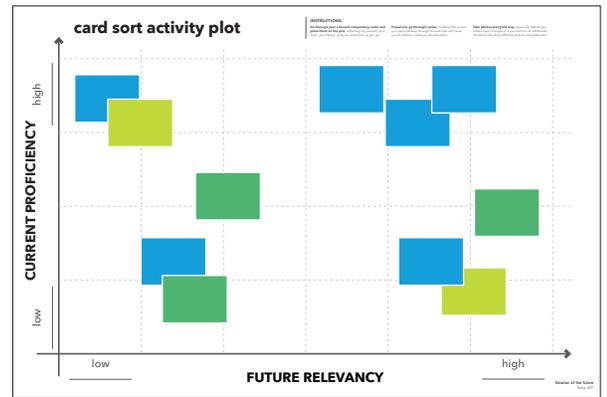
NOTE TO FACILITATORS:

Move through this step as quickly as you can since it's just a warm-up. This step is meant to be a practice turn where you don't keep score.

Pick the vertical competency category that most closely relates to participants. If your group includes participants with a variety of functional roles, plot only horizontal competencies.

Instructions continued

To complete the card sort activity, participants will prepare, reflect, sort, evaluate and act.



STEP 4: TEAM SORT! (35 MINUTES)

Based on the participants in your group and your reflections:

Select your top five competencies in each category

Plot the horizontal competencies one category at a time, discussing each competency and recording any key takeaways from the discussion.

Be sure to pick the horizontal competencies that are most relevant for your team, paying specific attention to selecting competencies that align with the ideas and terminology used in the references you consult.

Once you've selected the horizontal competencies, pick the set of vertical competencies that best relate to your group's role(s). Keep in mind that you can do multiple iterations keeping the horizontals the same and changing only the verticals for different roles.

Lay out the selected horizontal competencies and the most appropriate set of vertical competencies on a table adjacent to the printed sorting plot. The plot has two axes - relevancy and proficiency - each going from low to high using a relative scale. Go through the cards and locate them on the plot, reflecting on yourself, your team, your library, and your institution as you go. Prepare to go through cycles; it's likely that a card you place halfway through the exercise, will cause you to rethink a card you placed earlier. Take pictures along the way, especially before you make major changes or if you want to do additional iterations to include different vertical competencies.

NOTE TO FACILITATORS:

To test this step, think about how this type of activity might help you to determine functional roles for future hires.

After the group has completed the activity for the team as a whole, prompt participants to think about what it means for them as individuals and share.

Instructions continued

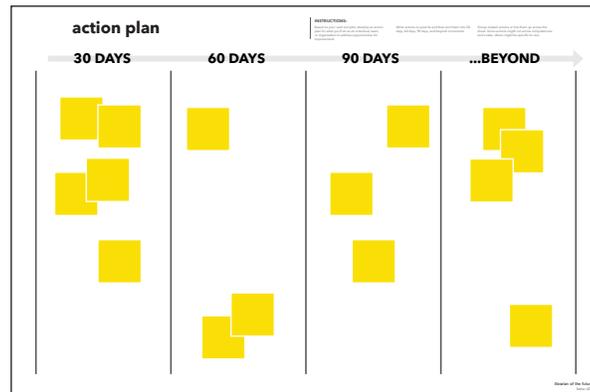
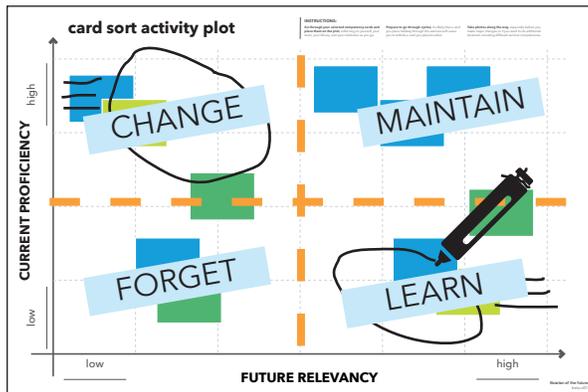
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STEP 5: EVALUATE AND ACT! (25MINS)

Reflect on your plot and the insights you captured on the plot, as part of the discussion, and with sticky notes along the way:

- What are irrelevant areas for your institution that you can stop worrying about?
- What are the high-proficiency, low-relevancy areas where you need to change and shift focus elsewhere?
- What are the relevant areas where proficiency is high and need only be maintained?
- What are the learning and development areas where you have high relevancy and low proficiency?

Based on these questions, develop an action plan for what you'll do as a team, organization, or individual to address any gaps and sort these into needs that will be addressed in 30 days, 60 days, 90 days, and beyond.



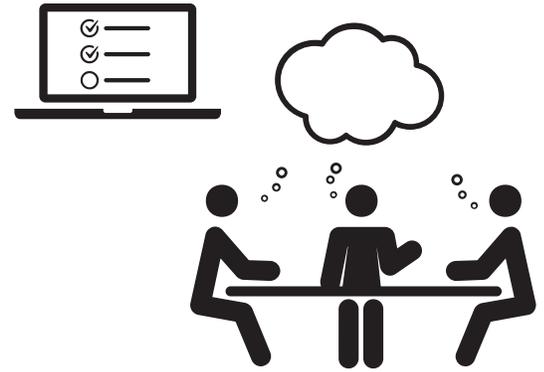
NOTE TO FACILITATORS:

You can use dots or sticky notes to identify who will take what actions, which can include a mix of team and individual plans.

Make sure to have a concrete plan for checking on progress at the respective increments in order to follow up and establish accountability.

Instructions continued

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STEP 6: PROVIDE FEEDBACK!

Because LibGOAL is a beta toolkit made for an emerging community, your feedback is essential to increase both its use and effectiveness. We would encourage you to fill out our feedback form with your reflections and think about what you can contribute; for instance, perhaps you can refer LibGOAL to a friend at a peer institution? Perhaps you see a set of vertical competencies that are missing and want to take a pass at drafting them? Perhaps you'd like to enable people to compare sorted plots and would like to host a forum for people to post their results? Contributions are welcome!

Go to www.libgoal.org to get involved or spread the word! Please let us know if you would like to test LibGOAL for yourself, contribute a set of competencies, suggest edits to existing competencies, suggest edits to the instructions, add a new category of competencies, or join our team.

Hypothetical Institutions

A way to warm up and practice!

LARGE PUBLIC RESEARCH UNIVERSITY

Greater Pacific University is a public research university located in Washington State with approximately 24,000 undergraduates and 10,000 graduate students. The university's strategic plan calls for redesigning the student experience to increase access and equity which will likely lead to demographic shifts (i.e., more first-gen and adult learners) as well as revamping academic and administrative student services to meet student needs. The library system is comprised of two hub libraries (an undergrad and grad, though these distinctions blur more each day), as well as specialized libraries for business, art and architecture, engineering, social sciences, and physical sciences. Currently, the library has a team approach where staff from different locations and different functional areas work together. This matrix structure works reasonably well to create communities of practice across locations while creating cohesive teams at each location. The library's longstanding director and senior leadership team are prepared to lead the library into a new era in which there is some consolidating of library locations (i.e., physical and social sciences) as well as rethinking the range of services offered, how these services are delivered, and who delivers them.

COMMUNITY COLLEGE

Knight Community College is located in Philadelphia, Pennsylvania and serves approximately 20,000 students, with particularly areas of strength corresponding to major industries in the city: healthcare, education, biotechnology, financial services and advanced manufacturing. The goals in the college's long range plan include increasing access while maintaining quality, increasing student retention and placement, achieving organizational effectiveness among staff and faculty, and upgrading space and technology infrastructure. Toward this end, the campus is planning a new hybrid library and student success center that will include library functions co-located with the full range of academic and administrative student services. This collaboration across of different units has sparked the idea of a cross-functional leadership group between library dean, CIO, and VP of Student Affairs along with cross-trained staff on the front lines. Exploring these collaborations and reorganizations has also triggered questions about future roles and skills. While the library director has been at Knight for over a decade, she's recently created a completely new leadership team that offers a fresh perspective and innovation agenda to complement her institutional memory.

Hypothetical Institutions

A way to warm up and practice!

SMALL LIBERAL ARTS COLLEGE

Oakerton College is located in northern Georgia, about an hour outside of Atlanta. It is a private liberal arts college with approximately 1,800 students. Oakerton's strength is its intimate scale and close-knit community, where the focus is clearly on the learning experience for its undergraduate students. The library has long been a central hub for the campus and has evolved with the times, though not always in lockstep with the changing needs of students and faculty. A relatively small staff means that library staff must often wear many hats and increasingly, a rigid, functionally-driven organizational structure seems to work against this kind of flexibility and prevents the kind of nimbleness that Oakerton's scale should enable. The staff is a broad mix in terms of backgrounds, skill levels, and experience levels. There's a sense that staff are succeeding in spite of the structure and also need to build new skills, add some specializations, and rethink the staff workplace to enable better teamwork. Because the scale is such a selling point, the library plans to roll-out a "personal librarian" program next year so every student and faculty member has a go-to person who's the face of the library for them.

PRIVATE RESEARCH UNIVERSITY

Metrotech University is a STEM-focused, private research university located in Chicago with approximately 4,000 undergraduates and 6,000 graduate students. As a university, it's focused on applied research and industry partnerships. Inspired by the University of Cincinnati's co-op program, the university is undergoing a major transformation to put in place its own program requiring 3 co-op semesters for undergraduates over 5 years and 1 co-op semester for master's students. The University is just beginning to wrestle with the logistical and programmatic challenges that come with having about a third of its students somewhere else at any given time. The library has a new dean who's in the midst of forming her new leadership team from a mix of existing and new staff. The library is located in one central facility and recognizes that it must redesign itself to support the university's transformation. To this end, the team is exploring how to support students during their co-op, how to support 3D printing and electronics in the library, how to be more embedded, nimble partners in sponsored research projects, and how to organize the library staff and services across disciplines to mirror the interdisciplinary learning and research work happening on campus.