

Anne Langley and Andrea Baruzzi

So you want to have a library retreat?

Planning, facilitating, and outcomes

Lewis Science Library opened on the campus of Princeton University in fall 2008. After years of planning, with feedback from librarians, library staff, faculty, and students, all of the science libraries at Princeton merged. As might be expected, the transition was difficult for all staff, some more than others, because everyone's jobs had changed and there was quite a bit to get used to. Everyone had been part of a small and subject-focused branch library, but now they were part of a multidepartmental and multi-subject science library. No one had the same job description as before; everyone had less varied responsibilities and many now shared workspaces.

In 2010, the library hired a new director. After the departure of one of the subject librarians and the administrative assistant in 2012, two new subject librarians were hired. Also, late in 2010, the library experienced a large flood that served as a catalyst for multiple projects: the restructuring of the stacks to be ADA compliant; the building of a new Map and GIS center; the incorporation of the psychology library into the collections; the closing of one of the service desks/entrances and limiting of access to an Annex collection; asbestos abatement on one floor; and yearlong paging of the entire collection during cleanup and construction.

In light of all this work, and given the struggles to unite everyone into a cohesive staff from the initial merger, it was time to have an event—or as it came to be, have a series of events—to assess where we were, who we were, and where we wanted to go.

Planning

When the retreat was first discussed at a librarian's meeting, we asked a few key questions: What are our objectives? How do we involve the entire staff in a productive way? What would our products be? And, finally, What kind of information did we need ahead of time to efficiently analyze our responsibilities? These questions provided a framework for us to plan the retreats.

We decided to have three retreats—two for librarians only (the first and last), and one including both librarians and staff. The first session with just the librarians would focus on mapping tasks and responsibilities, looking toward the future, and planning for the second, all-library retreat. The final retreat would then pull all of what we learned together and turn it into actionable items.

The authors shared a brief agenda for each of the retreats with the participants, but we kept a more detailed agenda for ourselves, because we wanted everyone's ideas to be fresh. To manage each of the retreats, we split up the activities so that one of us was responsible for specific sessions and the other became the support person for that session. Our intent was to switch responsibility with each session, unless it did not make sense to do so.

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At the beginning of each retreat, we stated the expectations: to fully participate, to keep an open mind, to stay focused on the work of the retreat, and to try not to check on your work in the library. Our suite of retreats was designed to accomplish five goals: assess whether the staffing level was correct for the amount of work we do, hold team-building activities for all staff and especially for new librarians, create a snapshot of the library, and look at future changes and assess how to get there.

Facilitating

More specifically, the first all-day librarians' retreat would map out everything we do, who we serve, what we see coming in the future, and anything else that might pop up. Our second retreat, a half-day, full-staff event would obtain feedback on responsibilities and see if any were missed, assess how we see ourselves, and help staff see themselves and their roles in the developments we predicted. Finally, we would hold a full-day librarians' retreat to put it all together and start working on our findings and the action items we derived from them. All three meetings would take place outside the library, in another building on campus, to encourage the participants to step outside their daily activities and be free from everyday distractions.

The initial librarians' retreat began with the video by Seth Godin, "This is Broken," about recognizing when things we think are working are actually broken.¹ The intention was to show that there are many ways to view a situation.

The video led to a lively discussion of differing perspectives from each librarian about the library and its services.

The next activity's goal encouraged the participants to think about the future. We each wrote down ways that Lewis Library or libraries in general might change in two, five, ten, and fifteen years, and then reviewed and discussed all the predictions. After lunch, the participants split into three groups—administrative/enterprise, tech services, public services—and brainstormed major tasks and

responsibilities in each of these areas. Next, each group reviewed the job descriptions of positions in the library and added any missed tasks or responsibilities to their list. The full group reassembled and discussed the responsibilities in each area, with an eye toward anomalies, surprises, or expectations, and then tied these to the future vision for the library.

Finally, we planned how the information from the first retreat would be presented to the staff and what the full-staff half-day retreat should look like. At the end of the day we had a future vision for Lewis, a snapshot of what Lewis does today, and a plan for the staff retreat.

The second, full-staff retreat included three activities based on the goals set in the first retreat. In the first activity, all the tasks and responsibilities identified in the first meeting were listed on stick note sheets that hung around the room.

Participants identified which tasks they perform, in which tasks they considered themselves expert, and which tasks they would like to learn more about. There was also a blank sheet on which they could list any tasks or responsibilities that were missed.

Participants could select from the following groups for discussion: a new integrated library system, more digital resources, simpler mobile devices, e-books and course reserves, and cloud computing. These topics were selected from the previous retreat's "futurization" activity. Groups discussed what is being done now in the library in these areas and how their work will change in the near future. The full group then reassembled for presentations from each group and an overall discussion.

Finally, participants were given three sticky notes and asked to write down three challenges they face in their work or see in the library. The notes were collected, read aloud, and grouped into similar areas. The group then looked at each area and discussed solutions to these challenges.

In the third retreat, the librarians met to discuss the previous retreats, discuss and

outline the retreats' final product, determine data needs, and assign responsibilities for completing the report. Though we had set guidelines for this meeting, there were no exercises or time constraints for each part. This worked very well, as the outcomes naturally flowed from one into the other. Once we decided that the final product would be a report giving a snapshot of Lewis Science Library and the work we do, we set about identifying data and other information that we should include.

Using Google Drive, we created and discussed an outline. Each librarian volunteered to write one or more sections of the report and to describe his or her own subject areas. At the end of this retreat, we had our assignments and a mutual document to work on.

Outcomes

Informally, after the retreats, everyone has a much better idea of their responsibilities and a good understanding of how the work they do intersects with that of others. We also discovered that we all see supporting the needs of patrons as our reason for existing—every single one of us identified that as a job responsibility. Everyone in the library sees patron support as a primary job responsibility, no matter where their office is or what the rest of their responsibilities are.

Formally, we have instituted twice-monthly 30-to-60 minute in-house training/show-and-tell sessions, open to all staff, on tips and tools for electronic resources, from *lynda.com* to citation verification in Web of Science. These sessions give staff the opportunity to expand their knowledge and thus help patrons better. We have created a lunch together on the first Wednesday of every month. Because our job responsibilities do not often overlap, it is good to have a regular venue that offers the opportunity to get to know the people we work with.

In addition, each staff member considered the decrease in print materials and the move to more digital ones as we updated our own job descriptions during the most recent round of annual reviews. A few staff

talked with their supervisors or the head librarian directly about taking on more digital collection support. Now the staff has a better understanding of why it is necessary to respond to change.

Planning your own retreat

Here are some retreat design tips you can use to engage the participants, keep them focused, and organize your activities:

1) Start with an introductory experience that will help people focus on the big picture and not just think about their corner of the world.

2) Have a dedicated list called “parking lot,” to write down for all to see unrelated ideas or thoughts that come up, and make time to revisit them near the end of the retreat. Everyone's ideas need to be acknowledged and heard, even if they don't fit into the retreat agenda.

3) Create activities that ask them to think big thoughts about the issues you want to cover; you may need to guide them to think like someone in a different job or situation.

4) Use the space and tools at hand to get people out of their seats and walking around the room, interacting with others and with ideas in a new way.

5) Offer a variety of ways from activity to activity for people to give feedback or to share ideas—some people are happy with sharing thoughts verbally with the entire group, others work better in small groups, and still others like to share ideas by writing them down on their own and having the facilitator share them. By providing a variety of response options, you will get participation/ideas from the entire group.

6) After each session, facilitate a group synthesis of what occurred (what was discovered/uncovered), so that participants get a feeling of closure and feel their contributions were valued.

7) Close with a wrap-up of possible next steps based on what happened in the retreat. This should come from the participants, so that they feel they have agency in the new directions the library is taking.

As you design your retreat, use facilitation tactics to create activities that will invite participation from all attendees.

Make sure to include different types so that you provide opportunities for engaging both introverted and extroverted participants. These can include:

- Have a large group brainstorm session.
- Have small group brainstorm sessions, and then have group leaders report back.
- Post ideas on large sticky note sheets around the room and have participants write comments on individual small sticky notes and stick them on the pages (the size of the paper will limit the length of their responses).
 - Post ideas on large sticky note sheets and have participants vote or mark on them in some way.
 - Have small groups analyze and synthesize the ideas that are posted and report their findings.
 - Show a multimedia clip, and have participants write a response to the clip and give them to the facilitator, who will then share them with entire group for discussion.
 - Give each participant multicolored cards to write responses to various questions, such as describing one way the library

(“Start by interviewing . . .” *cont. from page 248*)

but it is important to understand a library’s tolerance for change, which may vary widely between individual librarians and staff. In our experience, considering change within a larger framework, such as an inclusive process to create a fresh set of values, mission, vision, and strategic planning, helps those who are not ready for change begin to consider it for the future.

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will be different in two, five, and ten years. Synthesize by questions and discuss, either as a large group or in small groups that report back to the larger group.

Conclusion

We found the retreats to be well worth the time and effort. We created a strong group identity from our shared time together analyzing the work we do and, because we thought about what the future will bring, we all have a view of the road ahead and the big changes coming for libraries. Taking the time away from our regular activities can seem daunting to some and wasteful to others. But in our experience, it was worth every minute.

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Note

1. “Seth Godin: This is broken,” video on TED.com. (n.d.), accessed at www.ted.com/talks/seth_godin_this_is_broken_1.html. *ZZ*

at their libraries as a first step in the onboarding process.

Notes

1. Michael Watkins, *The first 90 days: Critical success strategies for new leaders at all levels* (Boston: Harvard Business Review Press, 2003).
2. “That tricky first 100 days: Executive onboarding,” *The Economist* 380, no. 8486 (2006): 65.
3. Peter Heron, “Becoming a university library director,” *Library and Information Science Research* 33, no. 4 (2011): 276–83.
4. Barbara L. Dewey, “In transition: The special nature of leadership change,” *Journal of Library Administration* 52, no. 1 (2012): 133–44. *ZZ*