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# Strategically creative: A case of the library planning process

## ABSTRACT

Best planning day ever, green, fun, play, flexible ... are terms not usually associated with strategic planning. At the University of Technology, Sydney (UTS), plans to open a new library building in 2016 have ignited discussions about the library of the future, its meaning and role in a digital world, and the implications of further rapid changes. The Library's strategic planning process in 2010 was an opportunity to take the collective energy further by involving library staff in the strategic thinking and planning. The process aimed to provide conditions for open conversation through Gadamerian play, and creative modelling based on ideas of revealing and imagineering. The planning started with a playful engagement to generate ideas and promote divergent thinking, and moved through several stages of increasingly convergent thinking to arrive at strategic actions, which were created and supported by all participants. The formal goals of strategic planning were maintained throughout the process and resulted in a client-focused annual plan. This article considers issues of organizational creativity and strategic planning, and relates them to experiences with the strategic planning at the UTS Library. It argues for a systematic approach to fostering creativity and innovation in libraries.

## KEYWORDS

strategic planning  
creativity  
serious play  
academic libraries  
library staff

## INTRODUCTION

In the context of the fast-changing information environment and universities' aspirations to be recognized as leaders in the knowledge economy, library staff require a great deal of flexibility to anticipate changes and constantly think of new forms of service provision. At the University of Technology, Sydney (UTS), preparations for opening a new building in 2016 have been used as an opportunity to discuss anticipated changes and their impact on library services. The Library's strategic planning in 2010 took this dialogue in a new direction by emphasizing creativity as an important aspect of the planning process and, subsequently, adopting the development of creativity as part of the library strategic plan.

## WHY CREATIVITY?

An ability to create new ideas and objects is a defining quality of being human. The opportunity to lead a creative life is part of fulfilling one's human potential. Creativity has also been increasingly appreciated for its potential to contribute to national economies. Governments emphasize innovation as a key aspect of national prosperity, and recognize that innovation depends on the creative potential of individuals as well as on social structures that promote creativity. Universities have a key role to play in an economy based on knowledge and innovation. Their libraries are expected to support learning and research by providing innovative services, and to lead the way in applications of new technologies on many campuses.

An increased demand for innovation has resulted in a range of new technologies that, in turn, have broadened opportunities for creative behaviours. Changes in knowledge processes have been noted at different levels. Primary and secondary education is increasingly adopting a model of the student as an active and creative learner, contributing to the shaping of a new generation of learners and workers. Cullen (2008) suggested that Generation Y is the first generation of 'prosumers' (consumers and producers) who expect to have creative engagement with the content of resources. There are indications that boundaries between analytical and creative academic work are blurring as a result of interacting with electronic resources (Sukovic 2011). A number of innovative technology-oriented companies encourage playful behaviours at work to boost creativity and innovation. With diminishing demarcation lines between a range of dichotomies such as provider–consumer, analytical–creative and work–play, traditional concepts of library service provision are becoming less relevant.

These changes in the way university staff and students work with information sources raise two implications for managing library creative capacities. First, in order to stay relevant to 'prosumers' and academic staff interested in new forms of scholarship, librarians need to be able to engage in dialogical, open-ended information processes, which require a high degree of flexibility and creativity. As a result, libraries face the challenge of maximizing creative potential within their own ranks. Most university libraries employ staff with a range of educational backgrounds and interests. A number of paraprofessional staff have tertiary education in various disciplines, in some cases even research degrees, and/or a significant artistic engagement outside working hours. However, anecdotal evidence suggests that libraries rarely tap into this creative potential.

Second, if librarianship is to survive intense competition from other players in the information arena, it has to remain an attractive career option for younger generations. There are indications that certain personality traits are associated with certain types of work within information systems (Kaluzniacky 2004)

and library professions (Williamson et al. 2008). Considering indications that people tend to stay in congruent environments while organizations recruit and retain congruent staff (Gottfredson and Holland 1990 in Williamson et al. 2008), the selection process may happen spontaneously to an extent. An implication for libraries is that they have to consciously adopt different recruitment strategies and develop flexible, creative environments if they want to attract and retain professional staff who will provide innovative services.

While it may not be too difficult to argue for the benefits of developing creativity in general, it is less clear how to define creativity that is beneficial for library clients. A significant part of this challenge is that any definition of creativity is shaped by a number of forces, including the social context. Csikszentmihalyi (1988) described creativity as a result of three main influences, one of them being 'field', meaning social institutions that select individual creations worth preserving. Social institutions associated with universities have been changing rapidly in recent years, but they are still far from reaching an agreement on what constitutes creativity for academic purposes. In the absence of widely accepted standards, it is often easier for libraries to experiment with the engagement of new undergraduate students than to decide how to establish an appropriate creative involvement with other parts of the university community. However, libraries risk losing their status or even becoming irrelevant if they wait for the verdict of academic juries. Libraries that decide to actively shape their potential for innovation can glean insights into the best ways of approaching the task from academic research and organizational experiences.

### CREATIVITY AS A STRATEGY

Innovative organizations have typically adopted innovation as a strategy rather than a chance occurrence or a response to immediate demands. Since creativity is inseparable from innovation, creative thinking needs to be part of organizational strategies and planning. However, a definition of creativity and, even more, the inclusion of creative processes in strategic planning has been an elusive goal for many organizations. McNicol analysed strategic planning in academic libraries in the United Kingdom and found the lack of connection with broader organizational plans and a 'local library agenda' (2005: 504) to be a common problem. The involvement of library staff in strategic planning has been identified in McNicol's study as a key issue to be addressed in library strategic planning. This is hardly surprising considering that 'strategic intellectual capital' and 'strategic imagination' (Völpele 2002) are not confined to managerial meetings, particularly in the information and knowledge industry. The close connection between creativity and strategy has been emphasized by Kao (1997: 6), who noted, 'If you're going to do great strategy, you need creativity. And for creativity to pay off, to have value, it requires a sense of impetus – a sense of direction – which can come only from great strategy'.

Although strategic thinking and planning are usually seen as part of the same process, Graetz (2002) distinguishes between these two aspects of the strategy development. In Graetz' model, strategic thinking is described as 'synthetic, divergent, creative, intuitive, innovative', while strategic planning is 'logical, systematic, conventional, prescriptive, convergent' (2002: 457). This distinction relates to divergent and convergent thinking styles, which are both part of creativity.

Serious play has been proposed as a way of incorporating creative thinking into strategic planning to produce more imaginative strategies (Roos and

Victor 1999). According to the authors, strategic imagination arises from three types of imagination:

- Descriptive imagination is used 'to evoke images that describe a complex and confusing world "out there"' (Roos and Victor 1999: 349). This type of imagination is associated with finding patterns, labels and images to aid analysis. A number of visual techniques have been used to promote descriptive imagination, such as matrices and flow charts. Artistic pictures of the organizational environment and future scenarios may also be used. A drawback of this type of imagination is that too much analysis may become paralysing.
- Creative imagination 'is about evoking truly new possibilities from the combination, recombination or transformation of things or concepts' (Roos and Victor 1999: 350). This type of imagination is associated with innovative strategies and is often mystified, although it relies on experience and analysis. 'The inherent trap of the creative imagination is fantasy', which is 'the domain of the impossible and improbable' (Roos and Victor 1999: 350).
- Challenging imagination is used to 'negate, defame, contradict and even destroy the sense of progress that comes from descriptions and creativity' (Roos and Victor 1999: 350).

Strategic imagination is formed by employing the three types of imagination in a social context where ideas and meanings are developed and shared. The goal of strategy-making is to guide real actions but, until the strategy is developed, it 'remains a conversation about "as-if" or "make believe"' (Roos and Victor 1999: 352), which is similar to defining qualities of play.

Strategic imagination and creativity, even when recognized as key elements of organizational growth, cannot develop without the right organizational conditions. Martins and Terblanche (2003) proposed a model of determinants of organizational culture that influence creativity and innovation. They identified flexibility, freedom and empowerment of staff as key elements of organizational structure that promote creativity. Minimized barriers between departments, encouragement of participation, and recognition that everyone can contribute tend to promote creative thinking (Higgins and Reeves 2006). Studies in psychology indicate that feelings and moods can promote certain styles of thinking. Experiments of induced mood by Chartrand et al. (2006) showed that people in a positive mood perceived their environment to be safe and were more likely to rely on heuristic and creative processing. A negative mood indicated a problematic environment, resulting in more analytical, effortful and cautious information-processing. The authors found that people primed by negative stimuli were more accurate in their processing of information and less likely to rely on stereotypes than people who were exposed to neutral or positive stimuli who were, supposedly, less cautious in subsequent information-processing. Damasio (2000) pointed to a relationship between a feeling of elation and a cognitive mode that increases exploratory behaviours, while sadness reduces inferences and exploration. Schooler et al. (1995) considered playfulness to be essential for creative and productive thought. It could be inferred that employees' negative mood may not have a detrimental effect on the successful completion of daily tasks and accuracy of information-processing, but it is likely to limit creative behaviours. On the other hand, inspiring and positive organizational cultures, which encourage exploration and playfulness, are likely to promote creativity.

## CREATIVE PROCESSES

A number of psychological theories have identified distinct stages of creative processes. Fisher and Amabile (2009) refer to this standard view as *compositional creativity*, which usually informs carefully planned organizational processes. The authors also identify *improvisational creativity*, which usually appears in situations of crisis and unexpected opportunities, but can also be embedded in organizational compositional creativity.

Elements of surprise and 'out of the ordinary' events may have positive influences on creativity. Gyskiewicz (2009) discussed the positive effects of small amounts of *positive turbulence* on organizational renewal. Turbulence occurs when 'new, or different, information comes into the organization' (Gyskiewicz 2009: 100). Its effect depends to a large extent on how fast the information is coming into the organization and whether there is sufficient input for a renewal but not too much to become overwhelming.

Positive responses to turbulence may be influenced by subjective tolerance of ambiguity. A connection between creativity and tolerance of ambiguity has often been proposed, but there are few empirical studies to provide evidence for this link. A study by Zenasni et al. (2008) examined the relationship, using a sample of adolescents and their parents, and found a significant and positive relation between creativity and tolerance of ambiguity. The authors over-viewed some explanations in the literature that suggest that people with a better tolerance of ambiguity are able to work on a larger set of stimuli for longer, thus optimizing their creative potential, and have a stronger motivation to explore original and complex stimuli.

In an organizational context, motivation to respond creatively to ambiguity may also depend on a range of other factors, including group dynamics and organizational culture. Informal relationships and inclusiveness are likely to promote creative thinking in teams. Initial openness and the lack of any criticism is essential at early stages of the idea development, although assessment is necessary at a later stage (Adair 2007). Typically, open-ended divergent thinking is used at earlier stages and convergent thinking at later stages for analysis and selection of proposed ideas.

A range of techniques have been used to stimulate the process, many of them based on sensory experiences. Coyne (2009) notes observations by Galton and Torrence that the use of the senses is critical for opening creative processes. Higgins and Reeves (2006) recommend a sensory-rich ambience and the use of tactile 'toys' to encourage playfulness. Not only do sensory stimuli encourage creative engagement, but prototyping also has an important role to play in early formulation of ideas. Simple inexpensive materials and techniques, which are easy to use for developing prototypes, are valuable in shaping early ideas (Ford 2009).

The literature suggests that although creativity is an individual trait, it can be affected by environmental influences. Considering the number of hours workers spend at their workplace, organizations have a particularly important role to play in enabling the creativity of their staff.

## STRATEGIC PLANNING AT THE UTS LIBRARY

Over the years, strategic planning at the UTS Library has been aligned with University strategic goals and objectives, and organized as an open and consultative process within the Library. The process evolved progressively, but was characterized by inclusiveness, with all staff invited to discuss proposed

plans. In recent years, the process featured two half-day forums where staff considered developing plans for the coming year. The forums were informative, but tended to be reactive.

Strategic planning for 2010–2011 was prepared to follow the same pattern when the author joined the library team and initiated discussions with the University Librarian about a different approach, which would provide a forum for open dialogue and stimulate participants' active engagement. Considerations of a different style of strategic planning were connected with the ongoing organizational commitment to developing an innovative model of the library of the future.

The approach drew on a range of ideas explained in the previous section, but basic principles came from the philosophy of hermeneutics, especially Gadamer's understanding of play, and ideas of revealing and imageneering. Play is one of the key ideas of Gadamer's hermeneutical philosophy. According to Gadamer (2004), any genuine conversation is necessarily open-ended as it depends on interactions between conversational partners. Gadamer explained the open-ended interaction as play, which happens in the space between the partners – it does not belong to and cannot be controlled by any player. Interpretation or, in the case of library planning, ideas and understanding develops in the space between the partners in the movement back and forth. Gadamer stressed that the participants take the interplay seriously. The first aim of the new strategic planning was to enable genuine conversation through Gadamerian serious play.

The ability to 'see' what does not exist has been recognized as an essential part of innovation since ancient times. Aristotle considered the revealing of ideas in human-made objects. In *Nichomachean Ethics*, Aristotle discussed *technê* as a way of revealing the idea that existed before the material object. Heidegger explained Aristotelian understanding of revealing as follows:

This revealing gathers together in advance the aspect and the matter of ship or house, with a view to the finished thing envisaged as completed, and from this gathering determines the manner of its construction. Thus what is decisive in *technê* does not at all lie in making and manipulating, nor in the using of means, but rather in the revealing mentioned before.  
(1993: 319)

Imageneering (a fusion of the words 'imagining' and 'engineering') as an idea and a technique relates to Aristotle's view of revealing. Imageneering is about imagining and modelling something that does not exist.

In the strategic planning, the intention was to invite participants first to imagine something that does not exist before 'engineering' the model of a library or, at least, an annual strategic plan. Open dialogue and realizing the products of collective imagination were guiding principles for the initiation of the planning process. Considering the staff involvement in discussions about the library development in the previous year, *The library of the future* was chosen as the overarching theme connecting a long-term vision with annual planning.

## THE PROCESS

The new approach was initially applied to the first half-day forum for library staff and, after very positive feedback, other aspects of the strategic planning were changed during the process. The main goal was to enable and maintain

the spirit of openness and inclusiveness while making sure that planning objectives were achieved.

The process was structured to start with activities, which encouraged playful engagement and divergent thinking and then proceeded to stages of increasingly convergent thinking. The process was developed through the following phases:

1. First Planning Day: gathering ideas and the development of an initial list of actions.
2. A consolidated list of actions was sent to departments to develop their refined action plans.
3. Departments used set criteria to prioritize actions (see evaluation matrix in Appendix A).
4. Second Planning Day: staff worked in groups to prioritize actions by using the set criteria and discussed all actions in a plenary session.
5. Senior management compared departmental and staff prioritization matrices and prepared the penultimate list of actions.
6. Draft plan was communicated to all staff.
7. Departments further developed their project plans.
8. Senior management confirms the final plan and communicated it to the staff.
9. Strategic plan was prepared for the University.
10. Collaborative annotation of actions' progress.
11. Sessions for staff to inform them about the progress.

The new approach to strategic planning was most prominent during the two planning forums (phase 1 and 4). In order to enable open conversation, obstacles of power relations were removed as much as possible and a team of younger staff members without managerial responsibilities was formed to participate in shaping the planning programme and to act as team leaders during planning days. The Library's team leaders worked with the author on planning and delivering the two staff forums. At the same time, the University Librarian's participation ensured a sense of organizational support.

Team leaders had a key role in engaging with other staff and realizing the aims of the inclusive strategic planning, and it was therefore essential to establish common goals and understanding. However, this was a challenging task. Most team leaders worked in different departments, some on different campuses, and had very few opportunities to interact spontaneously. Some of them hardly knew each other and none of them had worked with the author before. To set the tone and promote communication, in the first meeting the group received a handout in the light-hearted spirit of the project, outlining key aspects of the process. The motto on the handout 'We take our play seriously' captures the team spirit and the way in which the group operated throughout the process.

### THE FIRST PLANNING DAY

Since the process started in the same way as in previous years, and since there was not sufficient time for any organization-wide preparations, we decided to use an element of surprise to create an atmosphere of novelty and playfulness. Team leaders were asked not to discuss preparations for the planning day with their colleagues. Staff who came to participate in the planning day (approximately 50 people or a half of library staff) received a programme with basic details showing a humorous representation of old-fashioned and

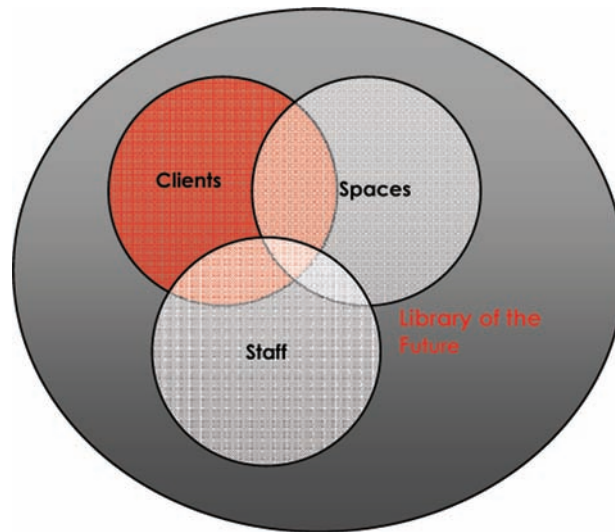


Figure 1: The planning theme.

futuristic librarians, and chocolate eggs (it was a day before Easter break). It was impossible to organize an informal sitting arrangement, and therefore participants found a room with an empty floor and only a few chairs against the walls signalling a different environment for the strategic planning forum.

The First Planning Day was organized in four main parts, with the theme Library of the future: Clients, spaces (physical and digital), staff (Figure 1):

- Introduction
- *In the future far far away ...* – developing models of the library of the future (group work)
- Presentation of models
- *Bridging the gap* – groups considered how they could bridge a gap between their imaginary libraries and the reality, and developed a list of possible actions.

During the introductions, participants saw stimulus material such as a humorous slide show on the development of libraries and information technologies and three video clips, each relating to one of the main sub-themes in a light-hearted manner. Team leaders called the names of their group members and led them either to smaller rooms or to their tables. Some team leaders prepared their rooms in advance (Figure 2). The teams were composed to avoid grouping people from the same department and ‘power clusters’, as we called groupings of managers, which may be perceived as dominating.

Team leaders were instructed to create an inclusive and safe environment in their groups where everyone would feel free to contribute, but also to take the role of agent *provocateur* and challenge the group to explore ideas as far as possible. At the start of the group work, participants were asked to personalize their name tags (some examples in Figure 3). As discussions progressed, groups either developed models of their library of the future or captured some of the main discussion points in material outputs. Although team leaders were advised that a model may be a drawing, cardboard construction, haiku, or a short story on its own or in conjunction with other outputs, all models developed during



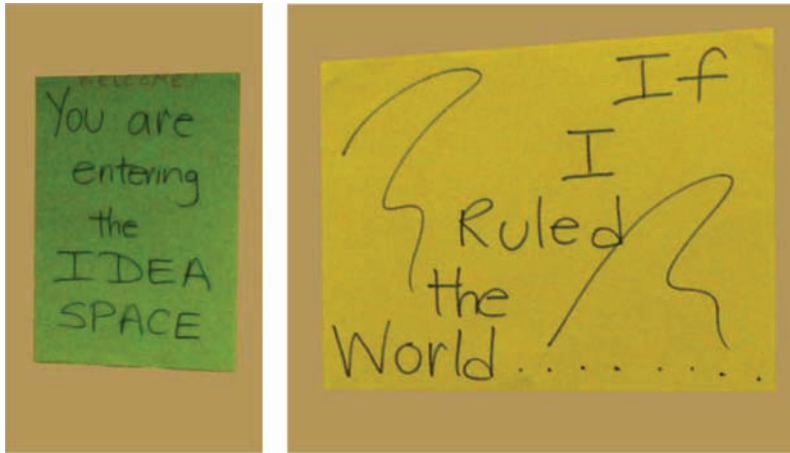


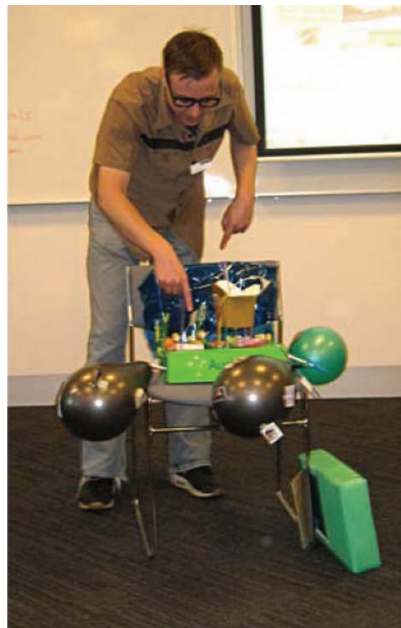
Figure 2: Signs prepared by one of the participants.

the group work were physical objects based on simple materials such as paper, boxes, Paddle Pop sticks, balloons and cuttings from magazines (Figures 4 and 5). Groups presented their models to all participants in a way that captured serious ideas in a light-hearted manner. A playful atmosphere, created at the beginning of the day by the sitting arrangement, programme, introductions and the appearance of some members of the planning team featuring headgear such as crowns and fur hats, and toys such as a Star Wars light sabre as part of their imaginary library personas, was prominent during presentations. Figure 4 shows a presenter wearing oversized fake glasses while explaining a group model.

In the second part of the group work, lists of realistic actions were developed on the basis of imagined models. Feedback from team leaders and individual participants indicated that the development of realistic actions flowed quickly and easily from previous activities.



Figure 3: Name tags.



**Idea Centered Around Library Space**

Our library space idea centered around a diorama we constructed of an idealized fun library space. Features of this space included:

An open space without desks that allowed students and staff to mingle. We used mini Easter eggs to represent students, who were positioned standing and lying, using computers and pda on a variety of furniture, including a long tube like couch. Staff were represented as unwrapped lollies, perhaps there is some meaning imbued by the lack of wrappers, it could be argued that this symbolises openness (somewhat tenuously).

Play areas including a see-saw ridden by more little eggs, and a pole to slide down into the area through a jungle gym-style apparatus.

A green and blue roof was also built, indicating plants and also a glass bottomed pool that looked down on the library space below.

The library space was made more aesthetically enjoyable with the inclusion of a green wall (plants) and a blue wall (water feature).

Balloons attached to the diorama indicated 'private study pods' that are customisable to the users' preferences, including lighting, music and even the size of the space itself.

Straws pinned to the diorama indicated ASRS delivery of books from the outside of the library.

 **malbooth** Amazing explanation of detailed future lib model from David! #libpd  
about 4 hours ago from TweetDeck

Figure 4: Presentation of a group model.



Figure 5: Model 'Library as origami'.

## DEPARTMENTAL PLANNING (FIRST PART)

In less than a month between two planning days, library departments used a consolidated list of actions from the First Planning Day and developed a list of departmental actions. A template was developed for descriptions of actions and therefore all departments included a similar level of detail, and decided about the primary responsibility for each action. Departmental actions were posted on the Intranet as they were developed and a compilation of all actions was uploaded on the Intranet before the Second Planning Day.

Managers prioritized their actions by using the evaluation matrix (Appendix A). Completed matrices were kept on file but were not made available to staff to ensure two independent evaluations.

## THE SECOND PLANNING DAY

During the Second Planning Day, action descriptions were randomly allocated to groups of participants who used the evaluation matrix to prioritize actions. Each group had one member who played the role of *digiscribe* and noted comments from group discussions onto an online mindmap or a spreadsheet.

After group work, participants considered actions clustered in thematic groups in a plenary session. Notes from discussions were added to the mindmap.

The Second Planning Day required more convergent and analytical thinking and thus it provided less opportunity for playful engagement. To maintain some of the spirit of the previous planning day, sitting was as informal as possible, toys such as soft balls and bouncy strings were provided for staff to handle while discussing actions during the plenary session, and some presentations towards the end of the day promoted a sense of fun with a serious purpose.

## DEPARTMENTAL PLANNING (SECOND PART)

The second part of departmental planning involved a consideration of all actions. Further consolidation of actions, and fine-tuning of responsibilities and priorities, resulted in a manageable plan of action, which was communicated to the University management and library staff.

## DIGITAL TOOLS

A range of digital tools was used during the planning process to promote engagement and collaboration. Twitter was used during both planning days. Tweeting allowed engagement with the professional community outside the Library and proved to be a useful tool for recording events, ideas and participants' responses. It was also a helpful tool for engaging group members who preferred this form of involvement.

Mindmap (<http://mind42.com/>) was used to organize numerous actions in thematic groups, to collaboratively annotate group discussions about actions, as a visual aid during discussions and as an aid in final stages of planning. The mindmap was useful as an organizational and visual aid, but this free tool had glitches that made it less useful for group work.

Spreadsheets were used to organize actions and evaluation. Some groups added notes to the spreadsheet rather than the mindmap. Spreadsheets were also used to display results of group evaluation in graphical forms.

Google Documents, Wordle, online surveys, Flickr, Doodle, blogs and the Intranet were also used during the planning process.

## EVALUATION

Tweets, observations, two online surveys (one after each planning day), debrief meetings with team leaders and feedback from managers by e-mail provided opportunities to all participants to voice their opinions and make suggestions, which were used to evaluate and refine the process.

Various tools for gathering feedback complemented each other. Twitter, for example, was a useful tool to capture immediate ideas and responses. However, tweets were posted by a small number of people, and the public nature of the tool likely influenced comments. Anonymous surveys, on the other hand, provided opportunities for more inclusive, reflective and, possibly, more honest responses. On the other hand, survey results were shaped by the nature of questions and may have been influenced by discussions with other participants. Similarly, all other forms of gathering responses had their advantages and shortcomings, but, together, they provided opportunities for well-balanced feedback.

## RESPONSES TO THE FIRST PLANNING DAY

The start of the First Planning Day was met with a whole gamut of responses, from a sense of unease, via cautious monitoring and restrained amusement, to an immediate engagement and even obvious delight. First tweets posted at the beginning of group work included the following:

‘UTS Lib planning day began with images past/future, good/bad to “born to be wild” – crazy already in a good way’

‘Oh noes craft projects’

‘Tension in group 4d already’.

Towards the end of the day, the post ‘Best library planning day ever’ captured the spirit of the tweets and the relaxed, energized atmosphere in the room. A debrief meeting with team leaders confirmed that most groups warmed up quickly and worked well together. It was also evident that few people remained uneasy throughout the day.

The first survey was posted a short time after the planning day and had eight questions: four required selection of an option on a five-point Likert scale and the other four were open-ended questions. The response rate was 68 per cent (34 responses).

The survey showed clear support for the format of the planning day. Particularly successful was its inclusiveness. The question ‘I could contribute to group discussions’ showed 33 positive and only one neutral response. With two exceptions, all participants thought it was a productive day. Most positive comments related to the engagement of relatively junior staff members as team leaders, fun activities, interaction with staff from other departments and the clear focus of the day’s activities. Opportunity to contribute and engage featured prominently on the list of positive responses. Some responses were as follows:

I thought the first planning day was a great success. Very engaging and thought-provoking. In addition to the major outcome of developing a list of actions/potential projects, it also had some less tangible, but still important benefits in terms of providing opportunities to work together,

improve communication, break-down any departmental silos etc, and also to engage everyone in thinking about the LoF [library of the future] so it is something we are all involved in creating.

[N]o-one could 'highjack' the planning day with own agenda (or not easily)

Questions about suggestions and what should be changed showed that many participants wanted more time, and a number of them voiced doubts about whether their ideas would be taken into account and whether they would receive any feedback from management. It was also clear that one or two people intensely disliked the planning day, particularly the 'kindergarten games'.

Suggestions for the Second Planning Day clearly indicated support for an inclusive process. We acted upon all general and more practical suggestions, which were in agreement with the wishes of the significant majority of participants.

## RESPONSES TO THE SECOND PLANNING DAY

The survey about the Second Planning Day was longer and asked closed-ended questions about the group work, plenary session, use of tools and overall satisfaction. It also included some open-ended questions. The response rate was 56 per cent (28 responses).

Overall satisfaction was very similar to the previous survey and many of the positive points were repeated. Participants also expressed a sense of a clear connection between the two planning days. Group work was most popular and perceived as more productive than the plenary session, but most people felt that the balance was right. One respondent seemed to feel disengaged from the process – there was only one negative response to questions about ability to contribute and overall satisfaction with the day.

Several analogue and digital tools were used during the day and a number of questions aimed to assess their usefulness. The evaluation matrix was the most popular – 88% of responses positively evaluated its usefulness for prioritization. The spreadsheet was more useful in organizing voting (84% positive responses) than as a visual aid to promote engagement during discussions (66% positive). More than half of the respondents found mindmap useful for recording comments (53%) and as an engagement aid (56%). Twitter was found to be useful as a recording tool by 72% of participants (Table 1). Some responses to open-ended questions indicated the use of technology as a particularly successful aspect of the Second Planning Day (e.g. 'I really liked

Statement	Agree and strongly agree (percentage of responses)
Sheets with criteria were useful for prioritization	88
Spreadsheet was useful to organize voting	84
Spreadsheet helped me to engage in discussions during the plenary session	66
Mindmap was useful for recording	53
Mindmap helped me to engage in discussions during the plenary session	56
Twitter was useful for recording	72

Table 1: Survey responses about the use of digital tools.

the use of the mindmap and twitter – brilliant’). Suggestions for improvement concerned glitches in the use of technology, as well as more information about actions and more structure during the plenary session.

Tweets during the day were sent mainly from the plenary session reporting responses to discussions about actions. A presentation towards the end of the day reported results of the first survey, including a negative comment about ‘kindergarten games’, and featured a light sabre. A number of tweets at the time repeated, ‘We love kindergarten games and Star Wars Light Sabers’.

### **FEEDBACK FROM SENIOR MANAGERS**

Apart from the University Librarian, the Library employs eight senior managers. Those who provided specific feedback on how the planning process affected them and their departments indicated strong support for the new format. Managers were very supportive of staff involvement and some thought that a sense of engagement was very beneficial for staff morale. Strategic planning arising from library goals, rather than a framework set by University management, was perceived as more useful and manageable. It was also seen as beneficial that ‘planning days were uncluttered from the process work’.

Some managers would have preferred more direction in planning between the two planning forums as there was some uncertainty as to what was expected of them. Some streamlining was required to improve managers’ collaborative drafting of action plans.

Overall, managers who provided feedback agreed that the planning process was improved ‘beyond anyone’s expectation’. The two directors were proactive in taking on board and developing further ideas that were raised by staff.

### **EVALUATION AGAINST THE PLANNING OBJECTIVES**

The main objective of annual strategic planning is to develop a workable plan, which can serve the interests of library clients and support University goals. The new planning process fully achieved this objective. From the first stages of the process, most ideas were client-focused. This became clear when actions were clustered around the main sub-themes ‘clients, spaces and staff’ and presented on the mindmap. Even staff-oriented actions, such as those related to staff development and work satisfaction, were expected to have beneficial effects on client services. In the final stages of the process, when the plan was aligned with University goals and objectives, it was evident that library staff had University goals in mind. Some senior managers pointed out that the trust given to staff by opening up the planning process was fully justified.

A less direct but important benefit of the planning process was its effect on the organizational culture. The process was particularly useful in developing a common vision for the library of the future. Details of various models together formed the collective vision of a sustainable, flexible and creative, outward-looking library.

Although positive views were dominant, the beginning of the planning process was an opportunity for some participants to voice their concerns or flag areas for change. Team leaders were instructed to encourage a variety of opinions and not to aim for a consensus, especially at initial stages. At the First Planning Day, one group that had predominantly negative views about the planning process and the future of the Library still ended up with positive actions aiming to address perceived problems. Anonymous surveys also

provided opportunities for staff to voice any negative opinions and doubts, which were subsequently addressed as much as possible, promoting a sense of a positive and responsive organizational culture. As a number of participants indicated, strengthening of connections between departments, improved communication and, very importantly, an ownership of the library plan were all important by-products of the new strategic planning process.

## DISCUSSION AND CONCLUSION

The experience with library strategic planning at UTS emphasized the social nature of creativity and innovation. First, what we identify as innovative is defined by previous experiences, in this case by similar processes within the organization and industry. Second, the depth and breadth of creative responses depend to a large extent on existing norms and expectations, on one hand, and on the other, creativity is enabled and supported by the whole organization. The unusual process of library strategic planning, although surprising to most participants, was made possible by the existing organizational culture, which supported staff engagement and primed staff to participate in thinking about innovative approaches to the Library's future. For any organization that intends to support creativity and innovation, the social nature of creative processes requires a commitment to fostering an appropriate organizational climate. As Kao pointed out, 'creativity must go beyond generating new ideas; it must become an ongoing process. Creativity is a process that has a grammar ...' (1997: 7). The UTS Library has recognized this and adopted the development of creativity as a strategic action.

A question is what is required from an organization to develop required conditions for innovation. Although the literature indicates a number of factors that could promote creativity, it is often difficult to establish the effects of organizational initiatives in isolation from other possible influences. The library strategic planning at UTS is a case of a distinct project, which provides an opportunity for gleaning some insights. The experience suggests that an element of novelty, or turbulence, as suggested by Gryskiewicz (2009), can stimulate creative responses. Cross-departmental teams can be beneficial in bringing together different skills and expertise, reinforcing a sense of common goals and fostering communication. Empowerment of staff, transparency and open communication seemed to have a positive influence not only on the range and quality of ideas, but also on the general mood, which, in turn, influences creative engagement. A critical element, underpinning all processes, however, is trust. It is necessary for staff to trust management and colleagues to be able to come forward with unusual, often incomplete ideas and to engage in an open dialogue. Management also needs to trust that staff can be responsible for important organizational processes. At the same, some risk-taking is a necessary part of the process. A range of personal characteristics and experiences as well as organizational factors influence feelings of trust and the ability of individuals and teams to take risks. Organizations committed to fostering creativity and innovation have to manage a very complex process of balancing issues of trust and risk-taking at all levels.

An appropriate selection of techniques for fostering creative responses is also important. A balance between open-ended and goal-oriented activities assists in guiding discussions to avoid possible pitfalls. The strategic planning team considered possible obstacles to purposeful staff engagement and discussed resolution techniques in advance. Our experience from the whole

process relates to Roos and Victor's (1999) description of pitfalls in working with the three types of strategic imagination. Descriptive imagination is necessary to set the scene. At the UTS Library, it has been primed by ongoing discussions about the library of the future. We used imaginary scenarios successfully to focus descriptive imagination on strategic goals, but avoided what Roos and Victor (1999: 351) described as 'analysis paralysis' by focusing discussions on main ideas and encouraging playfulness. Any undue focus on detail or special library functions was dissolved in groups comprising staff from different parts of the Library. Similarly to Roos and Victor's consideration of the downsides of creative imagination, we recognized that futuristic scenarios may lead to unproductive fantasies. However, we found that *Bridging the gap* activities during the First Planning Day led to realistic outcomes without disrupting the tone of the forum. Finally, we predicted that 'strategic nihilism', described as a pitfall of challenging imagination (Roos and Victor 1999: 351), may be an issue at any stage. Team leaders were prepared to deal with persistent negative feelings and thinking by using a range of techniques, including invitations to the group to respond to concerns raised during discussions and by asking questions such as 'What can we do about it?' In our experience, a prolonged negative attitude was an issue in one group only and, as survey responses indicated, a couple of people remained largely negative throughout the process. 'Strategic nihilism' in groups was addressed by expressing ideas in the form of a physical model and considering possible ways of resolving issues. Playful engagement aided creative expressions of negative thoughts about current practices. For example, 'the death of the counter' was a metaphor that encapsulated a whole range of undesirable library practices and encouraged a different strategic approach to services.

Our experience also confirms the importance of a mode of engagement in serious play (Roos et al. 2004). Simple materials and physical models aided conceptual thinking in groups. Our observation of staff members who made constant use of paper, glue and scissors during the First Planning Day had led to an explanation that physical objects and materials provided a mode of expression to people who may be less inclined to formulate their ideas verbally. Digital tools have supported and enabled a range of activities, notably communication with colleagues outside the organization.

Insights from the case of the UTS library strategic planning are limited by the scope of the project, but they clearly indicate that developing creativity involves the whole organization. Our experience supports Kao's belief in a 'Strategy Theatre' where we 'will have extraordinary environments for collaboration around issues of strategy, and linkage of that collaboration within a knowledge-enriched, technology-enabled setting. This new atmosphere will lead to a faster, smarter, better way of managing strategy' (Kao 1997: 11). Long-term organizational commitment to managing strategy in a creative and inclusive manner requires an ability to deal with a range of complex issues, including issues of power, communication, trust, organizational and team structure, and staff recruitment and retention, to name but a few. Experience from the strategic planning, however, suggests that investments in creativity and innovation may result in many benefits, including those that are not directly related to creativity, such as better staff morale and a more positive organizational culture. At the time when libraries face the challenge of extending a range of organizational experiences and strengthening their potential for innovation, charting creativity for library purposes may be one of the most creative tasks ahead for the profession.



**APPENDIX A****CRITERIA FOR PRIORITIZING PROJECTS AND ACTIONS**

Each project is evaluated on four criteria rated on the scale 1–3. Please circle one option for each criterion.

Department(s):

Project/Action:

Benefits for students and academic staff	Benefits for the Library (e.g. better organization, supports goals or image)	Costs (i.e. use of resources for the duration of the project)	Imminence	Sustainability (i.e. capacity to maintain beyond the project phase)
1. Low	1. Low	1. High	1. Should be implemented within five years	1. Low
2. Medium	2. Medium	2. Medium	2. Should be implemented within two years	2. Medium
3. High	3. High	3. Low	3. Should be implemented within one year	3. High
Total:		/15		

Comments:

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