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Participatory and Ethical Strategic Planning: What Academic Libraries Can Learn from Critical Management Studies — [Source link](#)

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Abstract

This paper introduces a subfield of management studies, "critical management studies" (CMS) in order to rethink mainstream management practices in academic libraries, with strategic planning as an illustrative example. Mainstream management models from the corporate sector prioritize efficiency, productivity, and numerical measures for assessing impact. Academic libraries have generally borrowed uncritically from this mainstream management praxis, but how well does this serve our needs, especially when it comes to the most complex issues we face? CMS draws on critical theory to interrogate the methods and goals of mainstream management, with an emphasis on denaturalizing "taken for granted" practices and prioritizing ethics and worker equity. After providing a brief overview of the history and adoption of mainstream management in academic libraries, this paper focuses on strategic planning as an illustrative exploration of CMS principles in an academic library context. Strategic planning is a common managerial practice that has been embraced by academic libraries and generally modeled after mainstream approaches. Yet, CMS scholars contend that traditional strategic planning reproduces workplace inequities and universalizes managerial interests. In this article, I employ ideas from CMS to rethink library strategic planning by opening participation, reframing problems, and embracing our ethical agency.

Introduction

In the field of management studies, a subfield referred to as "critical management studies" (CMS) has emerged in recent decades. Drawing on critical and postmodern theories, CMS aims to unearth and vocalize the "taken-for-granted" in the management of organizations (Reynolds 1998, 183). CMS researchers study management and workplaces using principles of defamiliarization, dissensus, and antiperformativity. Rather than taking existing structures as a given, they study how cultures and ways of doing work came to be within organizations. CMS also considers conflict and complexity to be a natural state of being. While mandated consensus and grand unifying narratives are often favored by management, CMS argues that this tendency to oversimplify issues and squash dissent is detrimental for progress and justice. Like other disciplinary critical theories (including critical pedagogy and critical information theory), CMS

has an ultimately emancipatory goal. CMS is a broad and diverse field of study at this point, but in general, CMS scholars are interested in equalizing working relations and empowering underrepresented voices in the workplace.

This paper uses CMS principles as a valuable frame by which to reflect critically on the development and practices of academic library management, with an in-depth focus on strategic planning. To start, I offer a brief history of mainstream management generally and within academic libraries. I then introduce fundamental concepts from CMS and suggest ways these would reframe our understanding of academic library management. In the second half of my paper, I apply CMS principles to strategic planning activities in academic libraries to illustrate the ways in which a more reflective practice can better align our organizations with professional ethics and help us solve our most persistent problems. A widely accepted management practice, strategic planning is the locus of negotiated power and signified values for organizations. Academic libraries have borrowed heavily from mainstream management in their strategic planning processes and the ways that we conceptualize problems (Moran, Stueart, and Morner 2013). CMS theorists characterize mainstream strategic planning as an activity in which conflict is often suppressed, certain voices are disqualified from participating, and managerial priorities and power tend to be uncritically reproduced. CMS scholars suggest alternative, democratizing strategic planning practices. I explore these and their applications in academic libraries, for instance, reconceiving how we problematize the lack of diversity in our profession or how we can prioritize ethics in strategic plans. Strategic planning is a valuable exercise that could, with critical insights, transform our libraries into more diverse, equal, and ethical workplaces. By making explicit some of the origins and influences that have shaped academic library strategic planning, I also hope to shed light on library management in general. As educational and research institutions, it is valuable to openly and critically interrogate our fundamental practices in light of our most pressing problems and desired outcomes.

Mainstream Management

Before proceeding to a critical review of management studies and practices, in and beyond libraries, let us briefly review how management as a practice assumed its current form. As management historians Daniel A. Wren and Arthur G. Bedeian write, “By tracing the origin and development of modern management concepts, we can better understand the analytical and conceptual tools of our trade” (2009, 4). I offer two caveats for the following overview: I am not a management scholar, and a detailed review of management history is out of scope for this article; and, despite CMS originating from European universities, the focus of my article will be management and academic libraries in the United States.

Our modern notion of management in the United States emerged in concert with the scientific and industrial revolutions of the late nineteenth century, not coincidentally around the same historical moment that libraries were being built on a mass scale and their operations were

professionalized. “Taylorism” is often identified as the managerial paradigm that initiated our modern understanding of the function and discipline. Also called “scientific management,” Frederick Taylor’s management theory was heavily influenced by the rational and scientific ethos of the Enlightenment, emphasizing “detailed analysis, measurement, exact planning” (Witzel and Warner 2015, 59). Taylor’s vision centered on worker efficiency, carefully delineated work functions, and relentlessly improving productivity. In his view, workers needed to be closely managed and incentivized (Montana and Charnov 2008, 16). Although management had been practiced and written about for centuries prior to this time, scientific management’s contribution was to construct a theoretical framework around the practice, aligned with values (efficiency, behavioral motivations) and goals (productivity) that persist to this day. Scientific management theories were deeply influential in the practice of management in the United States, and spread to organizations beyond business, including universities and nonprofits (Wren and Bedeian 2009, 252). Related management theories that also took hold in management practice in the 1900s included Max Weber’s “bureaucracy” (as an ideal, not a pejorative) and the administrative principles of Henri Fayol. These theories focused on organizational structure, the advantages of hierarchy and clear rules, and the particular role and functions of the manager (Moran, Stueart, and Morner 2013).

Recent decades have seen the early, purely technocratic scientific management evolve to accommodate a more flexible and innovative appreciation of human needs and contributions in the workplace, influenced by social sciences such as psychology and sociology. Behavioral theories influenced management thinking by the early to mid-twentieth century, promoting an understanding of workers as human beings with feelings who can be motivated and inspired to do good work under the right management (Montana and Charnov 2008, 23-28). In the current era, scientific management’s prioritization of efficiency and productivity persists in sometimes uneasy company with the behavioral movement’s attention to motivation, leadership, cooperation, and collaboration (Wren and Bedeian 2009). Rarely is any one organization, business sector, or community operating under a single and bounded management paradigm. Instead, the fundamental values of scientific management and behaviorism permeate today’s organizations, with varying degrees of other theoretical and cultural factors also influencing organizational structures. CMS scholars still assert that management as an institution remains strongly techno-rationalist in its orientation and driven by objectives, focused on efficiencies, outputs, and motivating employees toward shared goals (Alvesson and Deetz 2000).

The library profession has been heavily influenced by the mainstream management paradigms of the twentieth century. Indeed, librarianship modeled its operations after industry from the early days, albeit with a “persistent time lag” (Biddle 1992, 30). Melvil Dewey, one of the profession’s most prominent early leaders, “saw business practice as the ideal for the organization and practice of librarianship” (Higgins and Gregory, 2018, 26). As complex organizations, academic libraries have understandably been influenced by the organizational theories and management

paradigms of their eras (Budd 2005, 35). When libraries grew rapidly in size in the mid-twentieth century, library managers turned to other industries for models in administering their ever more complex organizations (Lynch 1985, 61). “When World War II ended, few library administrators utilized management principles. In subsequent decades, however, library management literature made frequent reference to [prominent management] theorists,” writes Wayne Wiegand in his reflections on the twentieth-century history of librarianship (1999, 20). Despite an oft-stated desire from the profession for a different way of organizing its work, the most common form of library organization remains the hierarchical bureaucracy: efficiency as the primary goal, a formal ladder of responsibilities, and well-articulated functional divisions (Budd 2005). Academic library managers also came to embrace the “latest organizational fashions almost as quickly as their corporate counterparts” (Day 1998, 651). In recent decades, many libraries have eagerly tried on managerial approaches from business such as “Total Quality Management” (TQM), “lean” management, and “Balanced Scorecard” (Dougherty 2008; O’Neill 1994; Cook, Heath, and Thompson 2001; Huber 2011). More critical voices of library management practices argue that academic libraries have become “McDonaldized,” characterized by administrative control, the prioritization of efficiency, standardization, and a focus on numerical measures (Quinn 2000). Another critique suggests that library leaders have “simply imitated business management practices and fads: adopting accountability/social capital/return-on-investment analyses of the institution, outsourcing core functions like collections and management, renovating spaces to mimic retail environments, and investing in faddish technology and eroding core functions” (Buschman 2016).

Critical Management Studies

Emerging in the 1970s and 1980s in European business schools, critical management studies (CMS) brings critical theory and postmodernism to the study of management. The rise of CMS in management education and scholarship could be seen as a response to an emerging disillusionment in the 1980s with the “modernist assumptions” of conventional management studies and practice (Alvesson and Deetz 2000, 10). The term “critical management studies” as a distinct designation for this body of scholarship is generally attributed to the eponymous 1992 collection edited by Mats Alvesson and Hugh Willmott (1992; Tadajewski et. al. 2011, 1). Three main criteria articulated by management scholars Valérie Fournier and Chris Grey have come to define critical approaches to management studies: nonperformative intent, denaturalization, and reflexivity (Tadajewski et. al. 2011, 3; Fournier and Grey 2000). In standard management practice and study, performance is the unquestioned goal. The work is governed by an unstated focus on maximizing output and efficiencies. The institution of management itself is taken for granted as necessary and beneficial. Mainstream management rests on an assumption that conditions such as globalization, competition, power imbalances, and wage inequality are “natural.” The “writing in” of that which has been “written out,” argue Fournier and Grey, constitutes a common thread across CMS scholarship--that is, pointing out the unnaturalness of organizational structures and conditions (2000, 10). Conventional management also does not

make its positivist methodology and principles explicit, whereas CMS is a reflexive approach that values self-critique and persistent, transparent questioning of its theories and methods. Leading CMS scholars Mats Alvesson, Todd Bridgman, and Hugh Willmott succinctly summarize the distinct contribution of CMS in the introduction to their *Oxford Handbook on Critical Management Studies*: “Its concern is with the study *of*, and sometimes *against*, management rather than with the development of techniques or legitimations *for* management” (2009, 1). Management is too important, powerful, and omnipresent to leave uncritically examined (Alvesson and Willmott 1992). CMS is primarily located within business schools, and the degree to which it should engage directly to reform management practice is contested (Fournier and Grey 2000). It is important to note that CMS is not impugning managers as a class of nefarious actors, but instead aims to study the underlying structures and meanings of management (Tadajewski et. al. 2011).

The principles and values of CMS have the potential to enrich our understanding of academic library management praxis, which generally aligns with mainstream management as a whole in its positivistic character. Some critics contend that library literature in general tends to be unreflective of its historical, sociological, and theoretical contexts (Budd 2003). Mark Day’s 2002 bibliometric analysis of library management literature to date finds that “most library administrators and information managers only follow the ideological superhighways that have been ripped through the management theory jungle” (2002, 284). From the mid-twentieth century, as part of their “professionalization project,” library management and scholarship engaged in an “attempt to strengthen the claim that managers in general and library administrators in particular were true professionals who possessed expert, scientifically validated knowledge” (Day 2002, 238-39). According to Day, library management literature often lacks theoretical inquiry or foundations or a generally accepted research paradigm, and is overly subject to the “detrimental influence of management fads and fashions” (2002, 242).

While CMS broadly coheres with other critical studies projects, its particular focus on the history, functions, and values of management brings a distinct and useful perspective to the critical librarianship literature. While management might surface peripherally, the focus of critical librarianship to date has tended toward other core topics such as cataloging, instruction and information literacy, and information science more generally (Drabinski 2013; Leckie, Given, and Buschman 2010; Tewell 2015). Critical librarianship publications and social media chats have occasionally centered around library workplaces as a topic, including labor issues and feminist leadership, but these discussions have not drawn on CMS scholarship or honed in on management, specifically (Lew and Yousefi 2017; see also critlib.org). Recently, Curtis Brundy considered library leadership development using concepts from critical leadership studies, a closely related field to CMS (Brundy 2018). Ilana Stonebraker et. al. noted the absence of CMS in the library literature as it pertains to information literacy (Stonebraker et. al. 2017), but the focus of their article was on instruction of business school students rather than the practice of

library managers. I believe CMS adds a unique focus on the distinct problems of management to the rich body of critical librarianship studies, and contributes a critical theoretical perspective to library management literature.

In the second half of this paper, I will attempt to bring the framing of CMS to bear on strategic planning in academic libraries, a complex and representative library management scenario. Strategic planning is a common managerial practice by which goals, values, and practices are discussed and set into motion. It tends to be high profile, high stakes, and also a task faced by most library managers in their careers. This critical reflection on current strategic-planning practices in libraries is intended to illuminate contradictions and limitations, and ultimately consider alternative approaches that preserve the value of strategic planning (which may simply be a necessity given governance requirements). Can we democratize the process, improve morale, invite better participation, and ultimately develop justice-minded plans that draw on wide expertise? By studying strategic planning with CMS theories in mind, I also aim to demonstrate one approach for employing CMS to guide study library management practice. I recognize that within existing academic library workplace hierarchies, some of the reforms and ideas below might be met with resistance as overly idealistic, incapable of overcoming power dynamics, or burdening nonmanagerial staff. These are fair concerns to which I may not always have an adequate response. However, I believe there is value in surfacing ideas from CMS that seek to remedy some of these imbalances so that we might discuss and consider them, even if implementation proves unwise or workable. Finally, in an attempt to adhere to CMS values of reflexivity and transparency in research, I share my own positionality as a current midlevel manager in a large research university library. I have participated in but never led library strategic planning at various institutions. I have been deeply involved in library assessment efforts, which are closely tied to strategic planning and the issues discussed in this article. I led development of strategy documents in the business sector during a previous career in advertising agencies. I consider myself committed to critical librarianship but also cognizant and respectful of management challenges and constraints.

Strategic Management and Critical Management Studies

Strategic management is founded on the notion that external factors affect the organization, that these can be understood and rationally addressed, and that managers must communicate the company's plans among increasingly disparate groups (shareholders, staff, international branches, etc.) (Knights and Morgan 1991). The modern concept of strategic management is a relatively recent development, but one accorded significant power and importance in current workplaces. The business sector and academia began to isolate strategizing as a managerial practice and discipline in the 1940s (Knights and Morgan 1991). Early studies established a connection between strategy and managerial activities and the effect of these on performance (Phillips and Dar 2009). "In rationalist analysis," write management scholars Mahmoud Ezzamel

and Hugh Willmott, “strategy is conceived as something that is an outcome of impersonal forces, available resources and/or the calculations of rational decision-makers” (2008, 196).

The terms “strategic management” and “strategic planning” are often used interchangeably by scholars and practitioners. For this paper, I will use “strategic management” when conveying ideas from CMS, as these scholars generally deploy this term and are studying a broader umbrella of ideas. I will use “strategic planning” in the next section when discussing academic library practices, as this practice is my focus in this paper and also the term used more commonly in librarianship.

CMS scholars have approached strategy as a core managerial practice that centers and reproduces power, employs uncritical methods, and has spread far beyond the business sector. Strategy is generally the province of management, and within strategic work there unfolds a rich and understudied interplay between management, nonsupervisory workers, relative power, discourse, priorities, and more. “As perhaps the most managerialist of the management specialties,” write CMS scholars David L. Levy, Mats Alvesson, and Hugh Willmott, “‘strategy’ largely takes for granted the historical and political conditions under which management priorities are determined and enacted” (2003, 92). Strategy also occupies a particularly venerated place within management practice and, as it frames and legitimizes managerial priorities, often reproduces workplace inequities. Those in the organization who practice strategy are assigned higher status while removed from, but still controlling, the day-to-day work. Finally, the public sector’s embrace of strategic planning makes an even stronger argument for the value of critical study. Strategic management is a “technocratic mode of decision making” now employed far beyond the business world (Levy, Alvesson, and Willmott 2003, 92; Bryson, Berry, and Yang 2010). “Strategy in the public sector,” argue Levy, Alvesson, and Willmott, “is seen to be complicit in promoting a market-based ideology in which citizens are transformed into consumers and state officials into a managerial elite” (2003, 99). Yet, mainstream strategic management even beyond the business sector is generally unreflective about its goals and methods, and takes its normative, rational, instrumentalist values and methods as a given (Ezzamel and Willmott 2008). According to business professor Henry Mintzberg, in *The Rise and Fall of Strategic Planning*, “The literature has been quick to point out what is gained by formalizing behavior, though seldom with supporting evidence. But it almost never addressed what might be lost” (1994, 19).

The methods by which CMS critiques strategic management teach us a great deal about how to critically study management in a variety of contexts, including in libraries. CMS scholars employ sociological, linguistic, political, economic, and cognitive frameworks to study strategy. In his work on strategic management as an ideology, Paul Shrivastava argues that strategic management universalizes the interests of top management and suppresses inherent conflicts. Shrivastava adds that in conventional strategic management, the existing environment is taken to

be the natural state and economic conditions are given privileged focus, with little attention paid to larger societal needs or the organization as a potential change agent (1986). Strategic management has also been studied by CMS scholars as a discursive practice through which meaning and power are constantly being renegotiated; resistance to strategy is understudied. Certain problems require “strategic” attention and certain groups--the managers--are given legitimation to solve them (Levy, Alvesson, and Willmott 2003, 93). The Foucauldian understanding of power and resistance is that these are not unidirectional but rather interactive, iterative, and dynamic throughout organizations. Along these lines, resistance to strategy is generally dispersed, organic, and disorganized, and worth studying for the insight resistance lends to our view of the outcomes of strategy efforts (Hardy and Thomas 2014). Levi, Alvesson, and Willmott articulate strategic management as a meaningful and powerful tool deployed to sustain or challenge power in contested social and political spaces (2003). In recent years, the concept of “strategy-as-practice” has taken hold among CMS scholars, bridging the theoretical-empirical gap by using evidence about how strategic plans are deployed and then reformulated in everyday practice and communication among managers and workers (Phillips and Dar 2009, 424).

Strategic Planning and Academic Libraries

The emergence of strategic planning in academic libraries was explicitly tied to corporate influence. The origin story of strategic planning for academic libraries begins with Robert Kemper’s doctoral dissertation in 1967, “Strategic Planning for Library Services,” which introduced and advocated for theories of strategic planning from the management literature (Biddle 1992, 55). Academic libraries began embracing formal strategic planning in earnest in the 1970s, with coordination and funding from the highest levels of the profession. This turn toward planning came at a moment of monumental changes for academic libraries, including rapid technological change and major campus unrest (Rice-Lively and Racine 1997, 33; Biddle 1992). In 1969, the Association of Research Libraries (ARL) established an Office of Management Studies “with the charge to investigate ways in which new management techniques might be used for finding solutions to library management problems” (Biddle 1992, 69-70). ARL subsequently co-commissioned a report with the American Council on Education from business consultants Booz, Allen & Hamilton on management issues in research libraries. The report, described later as a “major turning point in the history of academic library management,” argued that inadequate and incomplete planning posed a significant “impediment” for academic library management and that ARL should fund research and development around strategic planning (Booz, Allen & Hamilton 1970, 5-6; Biddle 1992, 68). Following this report, in 1972, Cornell University library director David Kaser hired the American Management Association to lead his staff through a rigorous strategic planning process (McGrath 1973). William McGrath, the library director at the University of Southern Louisiana, was hired to observe and document Cornell’s process. He began his book-length report by noting the value of mainstream managerial methods for libraries. McGrath wrote, “If Cornell University Libraries were to

continue as a viable and dynamic organization, then [according to Kaser] the principles of modern management must prevail in that organization, and the assistance of outside management expertise would be necessary” (1973, 2).

From this time forward, a corporatized model of strategic planning came to be widely adopted by academic libraries and their campus communities, particularly as a response to rapid technological change and austerity in higher education. ARL’s Office of Management Studies ran a series of programs throughout the 1970s that brought modern management techniques widely to the library management sector: “As one of these management techniques, strategic planning had also become a generally acceptable tool for consideration” (Biddle 1992, 95). Donald Riggs wrote *Strategic Planning for Library Managers*, the first book-length treatment of library strategic planning and one that offered a mainstream managerial model, in 1984. In the 1980s, libraries were facing “austerity and retrenchment,” and Riggs argued for the value of strategic planning to fight the perception administrators have of the library as a ““bottomless pit” agency/department because, each year, the amount of funds requested by the library grows larger and larger” (7). It was around this time that higher education as a whole embraced strategic planning, in response to the same forces affecting their libraries; in the 1980s, “higher education jumped on the strategic planning bandwagon” (Birnbaum 2000, 68). By the 1990s, many books and articles had been written in the library literature on the topic (Birdsall and Henslet 1994). Budgetary reductions in higher education and technological change continued to be significant challenges for academic libraries in the 1990s, and consequently, strategic planning came to be seen as crucial to responding and surviving. “As we run on our treadmill, trying to cope with these opposing pressures, realities, and visions,” wrote university library directors Meredith Butler and Hiram Davis, “we are turning increasingly to strategic planning as a powerful management tool to help us analyze, reconcile, and integrate disparate and often conflicting individual images of the future into a coherent, compelling, and shared vision toward which we can progress with optimism, vigor, and conviction” (Butler and Davis 1992, 393-94). ARL produced a SPEC Kit on strategic planning in 1995, finding that “strategic planning is alive and well in ARL libraries. It appears to be far and away the most common mode of planning and with few exceptions has been deemed successful by library and university administrators” (Clement 1995, 3).

Producing a strategic plan can now easily be characterized as an ordinary and expected management practice for academic libraries. Budget pressures, technological transformation, and convulsions within higher education have only continued apace since the 1960s when strategic planning first came into vogue in academic libraries (Saunders 2015). A random sample of ARL libraries in 2009 found that approximately 80 percent had a strategic plan (Staines 2009). In its eighth edition published in 2013, a widely used library management textbook features an entire chapter on strategic planning. This chapter suggests using “SWOT” and “PEST,” acronyms for ways of categorizing organizational conditions with origins in the business world (Moran,

Stueart, and Morner 2013; Mintzberg 1994, 36). Typical elements of a library strategic plan are expected to include the following: a SWOT analysis, environmental scan, mission statement or vision, and goals that are “assessed against specific metrics” (Saunders 2015, 286). The *Journal of Library Administration* debuted a column in 2013 that continues to this day dedicated to strategic planning and assessment (Dole 2013).

Today’s library strategic plans resemble their business counterparts by privileging assessment and measurement, marketing, and centralized institutional and management priorities. Assessment is mentioned consistently in current library strategic plans (Staines 2009). It appears as a strategic goal, activity, or integrated within other goals (Saunders 2015). A sales and marketing mindset is promoted by one article as the best foundation for library strategic planning, with libraries urged to adopt a “Seven P’s marketing process” to better understand their “customers” (Germano and Stretch-Stephenson 2012). Academic libraries also, by necessity, try to align with their home institutions’ strategic goals (Saunders 2015). When ARL engaged in an association-wide strategic planning exercise from 2013 to 2015, they analyzed member libraries’ strategic plans in concert with their parent institutions’ and IT organizations’ strategic plans (ARL 2016). In terms of whose priorities guide strategic planning, one library management textbook states multiple times that management should set strategic goals and make decisions (Evans, Ward, and Rugaas 2000). Riggs wrote that strategic planning in libraries should be driven by leadership and cannot be delegated to a committee (1984, 3). Strategic planning often stays within the administrative level, “so librarians and staff may not realize the potential impact of the mission and goals on their everyday work life” (Casey 2015, 330). Librarians from University of California–San Diego characterized their standard approach to strategic planning as entirely initiated and driven by library management prior to changes they made in 2008-9 to be more inclusive (Williams, Dearie, and Schottlaender 2013).

Re-envisioning Strategic Planning in Libraries with CMS Principles

Dissensus and Participation

CMS scholars advocate for an approach they term “dissensus” that could be employed to democratize library strategic planning. Dissensus (as opposed to consensus) is to uncover hidden conflicts, discursive closures, and systematically distorted communications. According to Alvesson and Deetz, “discursive closure exists whenever potential conflict is suppressed” (2000, 178). A common way this occurs in library strategic planning is by disqualifying the expression of certain voices, mostly through bounding planning activities within management levels and limiting the roles of other staff. CMS scholars Isabelle Huault, Véronique Perret, and André Spicer, influenced by the philosopher Jacques Rancière, advocate for the fundamental equality of all members of an organization so that potential is not predetermined by position and role (2014). In the CMS paradigm, any member of an organization has legitimate insight to offer in the strategic planning process. Instead, in practice, disqualification of certain voices happens in a

variety of ways: excluding some participants from discussions, inviting or honoring only certain kinds of expertise in the plan development, or privileging some methods of analysis or types of evidence over others. At each stage of disqualification, “closure is present . . . to determine origins and demonstrate unity” (Alvesson and Deetz 2000, 179). Therefore, the history of conflict and the “tension of difference is lost” (Alvesson and Deetz 2000, 179). To create dissensus in library strategic planning would be to instead assert the equality of all members to participate, re-engage in conversations that were prematurely cut-off, avoid premature and inauthentic consensus, and be open to alternative imaginings of how we conceive of and organize our work.

While these notions might seem utopian or unrealistic for many workplaces, CMS scholarship suggests various tangible methods to achieve meaningful and open participation in the strategic planning process. Management scholars Saku Mantere and Eero Vaara describe, based on their research, three organizational discourses that broaden participation and open up communication in strategic work: “self-actualization,” “dialogization,” and “concretization” (2008, 345). Staff are active participants in strategic processes when individual employees are genuinely empowered to define objectives and strategic planning is seen as a “collective search for meaning” (Mantere and Vaara 2008, 351). The strategic realm in libraries is often the purview only of administrators, with lower-level staff lacking a “real discourse community or ideology to defend their interests” (Day 1998, 655). In CMS-informed library strategic planning, instead there would be space, time, and permission for staff to develop organizational goals from the bottom up. Managers would refrain from characterizing the process, at the outset, as fulfilling a top-down, mandated vision. Dialogue could instead be established in which top management suggest and even--eventually--approve objectives, but staff are encouraged to question these and also determine the tactics and implementation. Perhaps most important, staff are not penalized in any way for perspectives that do not align with those of management. Finally, effective participation happens when the strategic plan is demystified and viewed as a concrete, relatively ordinary, but vital part of decision making. Mystification happens when strategic work is assigned special status, done secretly, assumes special vision on the part of planners, and nonmanagers only participate in the implementation step rather than the development. Instead, concretization in planning means that strategic planning is understood to be a tool available to all levels of the organization, often something that is constantly renegotiated and revised, with “strategizing seen as everyone’s right and responsibility” (Mantere and Vaara 2008, 352). “In a way,” write Mantere and Vaara, “concretization can be seen as a radical discourse discarding the traditional ideas related to ‘grand’ strategies” (2008, 352).

Although the mainstream approach to strategic planning in academic libraries aligns with corporate management paradigm, some libraries have experimented with bottom-up, grassroots strategic planning in ways that illustrate the promise and power of CMS principles. Librarians at Indiana University Bloomington (IUB) were troubled that most academic libraries did not

acknowledge the positivist, business-based origins of their strategic planning processes. Due to these concerns, they turned instead to the work of public policy professor John Bryson (McClamroch, Byrd, and Sowell 2001). Bryson argues that the traditional market-driven approach to strategic planning is ill-suited for nonprofits and public organizations, which are distinct from businesses in both their missions and their organizational structures (2004). Instead, Bryson outlines a “political decision-making model,” inductive in its approach and beginning with “issues, which almost by definition involve conflict, not consensus” (2004, 18). Despite the extra time Bryson’s model required of them, the IUB librarians believe that “developing staff goodwill, camaraderie, and a shared purpose are intangible benefits not easily measured in dollars and cents” (McClamroch, Byrd, and Sowell 2001, 378). Similarly, the University of California–San Diego Libraries cited the “transformative changes” facing libraries as a reason to radically change their strategic planning approach to be staff-driven and bottom-up: “The process has resulted in a Libraries staff more engaged in a committed to charting the Libraries future, and their own” (Williams, Dearie, and Schottlaender 2013, 9).

Denaturalization and Diversity

The socioeconomic homogeneity of library staff is a specific and persistent problem in academic libraries, one that would benefit from CMS recommendations of dissensus, reframing, and denaturalization as part of a strategic planning process (Riley-Reid 2017). As discussed earlier, CMS scholars assert that inequality is reproduced when managers dictate the shared understandings of organizational problems. Instead, we should interrogate how we frame the problem: “This [dissensus] happens,” write Huault, Perret, and Spicer, “when what is understood to be shared understandings of what is thought to be common, taken into account and considered are shaken up and disturbed” (2014, 40). One factor in libraries’ failure to make progress in diversifying their staffs could be a mischaracterization of the nature of the problem and who should contribute to the solution. Organizational researcher Brenda Johnson brings CMS principles to bear on racial inequality in the workplace: if organizations are social constructions in service to their most powerful interests, then we must interrogate the usual ways that workplace diversity has been characterized and what is considered a “natural” approach to the problem of inequality. Johnson questions what she sees as the standard, taken-to-be-sensible framing around racial inequality in the workplace: (1) the more commonly proffered solution is to offer diversity training to white employees, rather than try to take on white resistance to racial equality, and (2) we typically characterize the problem as one of individual attitudes, rather than addressing collective societal racism that permeates the workplace. Johnson writes: “The power to define organizational problems, to name who or what is the source of those problems, is central to how racial inequality is constructed and reproduced” (2009, 274). Johnson cites evidence that the pervasive diversity training in workplaces is largely ineffective. Instead, she argues for structural approaches that involve all levels of the organization, dedicated staff, and concrete plans for addressing a lack of diversity (2009).

A more democratic approach to strategic planning that borrows from CMS principles of dissensus and dialogization--one that makes room for the voices of library staff of color--could lead to a more actionable framing of racial inequality in library staff. According to the 2016 *Strategic Thinking and Design Initiative: Extended and Updated Report*, many research university and library strategic plans mention diversity, but based on textual analysis, it is not a top concern (ARL 2016, 103). One way to bring this issue to the forefront of library strategic planning is to listen to the voices of library workers of color or potential recruits. Libraries could be intentional and systematic in ensuring that library workers of color are full participants in strategic planning and that their ideas and concerns are not disqualified. This approach requires managers to be mindful not to burden employees of color with extra work in the process or force scenarios that are unsafe for them. A start would be to first visit the existing literature written by academic librarians of color. For instance, academic librarians of color have written about specific challenges they face while navigating an environment that can feel hostile to them, the pressures of gaining tenure, and the need for mentorship and clarity of expectations (Riley-Reid 2017). Librarians of color also report experiencing a variety of racial microaggressions, while white colleagues responding to the same survey did not report witnessing microaggressions (Alabi 2015). With more democratic participation and a denaturalization process, we might find library strategic plans including more explicit goals around establishing support systems for librarians of color, as well as closely mentoring these librarians on the tenure track and clarifying tenure expectations.

Nonperformativity and Ethics

CMS scholars argue for an ethical framework in strategic planning because organizations are inherently moral agents and attention to ethics builds internal and external trust. An academic library is a community of individuals that collectively is a moral agent; ethical considerations of work should be taken as seriously as other measures of performance such as circulation, visits, consultations, and so on. Our long-standing professional values (e.g., openness, accessibility, public benefit, intellectual freedom) can be undermined when we uncritically model our strategic thinking after business and industry. An organization such as an academic library is granted agency by its campus community to fulfill a certain educational and social role. It is through policies and practices, including strategic planning, that the library's moral agency is enacted (Buchholz and Rosenthal 2006, 235). In his influential article on ethics in strategic planning, management scholar Larue Tone Hosmer writes: "Many persons active in the research and teaching of business management view managerial ethics as a matter of personal virtue, not corporate strategy. . . . Conversely, many of the people active in the research and teaching of normative ethics have a deep distrust of business management, and accept a very basic microeconomic view of the firm that stresses profit maximization at the cost of human values" (1994, 19). Every strategic plan involves what Hosmer characterizes as "moral problems," decisions that benefit some people and cause harm to others. Rather than ignoring moral problems, Hosmer argues that managers can apply an ethical framework to strategic planning so

that distributing benefits and harms is done thoughtfully rather than capriciously. This process is inherently valuable to organizations because the careful consideration of all stakeholders builds trust and leads to authentic cooperation and innovation (Hosmer 1994).

CMS scholars have borrowed from feminist theory to articulate an ethical approach to strategic planning that is also well-suited for academic libraries. The concept of “stakeholders” has been widely used by management theorists in recent decades to build a bridge between ethics and business (Wicks, Gilbert, and Freeman 1994). However, CMS scholars Andrew Wicks, Daniel Gilbert, and R. Edward Freeman critique the “masculinist” underpinnings of stakeholder theory, in which the organization is autonomous, in control of its environment, driven by conflict and competition, hierarchical, and objective (1994). Instead, they argue for a feminist stakeholder theory based on Carol Gilligan’s “ethic of care” in which organizations are comprised of networks of stakeholders who work in solidarity rather than in competition, and who are responsible for their actions’ impacts on all stakeholders. “We advocate,” they write, “that managers drop the quest for objectivity and embrace the quest for solidarity and communicatively shared understandings. . . . The strategic direction of the firm should always be thought of and developed in terms of ‘us’--the interests, desires, and needs of all stakeholder groups--rather than a firm charting its path as a lone actor” (Wicks, Gilbert, and Freeman 1994, 490).

Critical librarianship scholars have argued that feminist theories of management are particularly resonant for libraries. Indeed, librarian Shana Higgins also draws on Gilligan’s “ethic of care” to advocate for its rightful place in librarianship, a feminized profession with a social justice mission (2017). When library managers April Hathcock and Jennifer Vinopal asked librarians what feminist leadership meant to them, respondents described “leadership styles and methods in the service of feminist values, such as community building, creating a safe environment, valuing diversity, empowering others, and information sharing” (2017, 162). Feminist theory also provides guidance for academic libraries to acknowledge their moral agency and bring ethics into their strategic planning. A feminist-derived, ethical process for academic library strategic planning would be participatory, transparent, strive for equity, and recognize a broad array of interdependent stakeholders, including workers and community members.

Conclusion

Academic libraries must operate under significant pressure from budgetary constraints, administrative scrutiny from their governing bodies, and a constantly changing information landscape. From their earliest days, academic libraries have drawn on conventional business principles to guide our managerial practices. It is understandable that academic library administrators, many lacking formal management training, turn to the guidance of experienced business and industry professionals in structuring and operating our complex organizations. Yet, mainstream management continues to reflect its roots in the scientific and industrial revolution,

with an emphasis on efficiency, productivity, and worker control. Despite academic libraries being fundamentally different organizations than for-profit businesses, these workplaces likewise persist as hierarchical bureaucracies with sharp divisions of labor, in which plans and goals are often expressed and assessed in numerical measures. Some of these ways of approaching our work have served our libraries well. However, library managers can also be mindful of the historical origins, context, goals, and implications of the business models we follow. With recognition that we face ongoing problems resistant to easy answers and also unique to our field, academic libraries would benefit from critically interrogating our common management practices and considering alternatives.

Critical management studies (CMS) helps us imagine what those alternatives could look like. This subfield of management studies radically reframes our understanding of organizational cultures and the practice of management. Adhering to principles of dissensus, denaturalization, and nonperformativity based on critical and postmodern theories, CMS recommits workplaces to open, equitable participation and ethical practices. As institutions deeply shaped by mainstream managerial principles and processes, academic libraries can learn a great deal by reframing our practices according to critical management principles. Strategic planning is an illustrative and common exercise in most academic libraries that draws directly on mainstream business models. Critical management scholars have problematized conventional strategic planning as a process that often reproduces workplace inequality, suppresses conflict, and ignores moral problems. In this article, I have suggested ways to infuse traditional library strategic planning with critical management studies principles that invite broader participation, openly confront issues like workplace diversity, and bring ethics to the forefront.

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