

# Strategic Planning Review

Please give your library a score of one to 10 for each of these statements.

1. \_\_\_ My library has a strategic plan written or updated in the last six months
2. \_\_\_ Our vision/mission statement is focused on the better future of the people we serve rather than just on library “platitudes.”
3. \_\_\_ Our community or institution members have active input into the strategic plan.
4. \_\_\_ Our staff has active input into the strategic plan.
5. \_\_\_ Our strategic plan is written in everyday language.
6. \_\_\_ Everyone at the library is familiar with the strategic plan.
7. \_\_\_ The strategic plan is used or referred to on a weekly basis.
8. \_\_\_ The strategic plan is used to evaluate the director’s success.
9. \_\_\_ The strategic plan is used to evaluate management success.
10. \_\_\_ The strategic plan is evaluated and modified on a regular basis.
11. \_\_\_ The library changes for the better because of the strategic plan.
12. \_\_\_ Life improves for the library user because of the strategic plan.

Quick, Cheap and Decent Strategic Planning:

More Effective Responses to Library User Needs

Texas Library Association–March 31, 2009–Houston, Texas

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# Quick, Cheap & Decent Strategic Planning

Why even the smallest, poorest, newest, oldest, richest and most successful libraries all need a strategic plan.

1. Creates a written contract for making decisions.
2. Replaces personality cults with written agreements.
3. Reduces micromanagement by executives, director and staff.
4. Provides objective criteria for project and individual evaluations
5. Gets everyone on the same page: saves time and money.
6. Everyone has the same information: transparency promotes trust.
7. Creates a contract between director and institution: accountability.
8. Creates criteria for decision-making: Does it support the plan?
9. Moves the library forward to a new destination.
10. Stays relevant to the community or institution it serves.
11. Eliminates pet projects.
12. Establishes new goals for everyone: Everyone grows.
13. Establishes a consistent plan for change.
14. Why does the library have to change?
  - a. Culture and society are changing.
  - b. Technology is changing.
  - c. The current library users are changing.
  - d. Potential library users are changing.
  - e. Former library users are changing.
  - f. The communities and institutions the library serves are changing.
  - g. The library's competitors are changing

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# The Compelling Future Cheat Sheet

1. Work for the better future: for yourself, your loved ones, your workplace, your community, your library, the people you serve.
2. Optimists tend to be right in the long term: Optimism is about the potential of the future.
3. People who have compelling futures may live longer and healthier lives, according to the University of Denver and Viktor Frankl.
4. A compelling future keeps you active in the present.
5. A compelling future keeps you focused on the more important facets of life and gives you a better sense of perspective.
6. People without a compelling future tend to be petty and angry.
7. Positive futures give positive meaning and purpose to life, as well as positive energy.
8. In studies of multi-generational families in poverty, children who don't dream, talk and play regarding their futures by the time they are seven or eight will more likely to still be in poverty by the time they are adults.
9. Adults who stop dreaming, talking and playing about the future stop growing.
10. Planning and acting on behalf of a personal dream can reduce your stress through bad times.
11. Successful people create multiple, long term written goals; once a goal is achieved, they replace it with another long-term goal.
12. Your goals inspire other people, which is one of the key factors to successful leadership.
13. Successful personal vision and mission are like a personal strategic plan: They are based on explicit principles and values.
14. You need other people to fulfill your vision; do other people know about your vision? How can they participate?
15. Successful people have the same number of hours in a day as unsuccessful people; the difference is how they use those hours.

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# The Five-Minute Strategic Plan

<b>Input</b>	Gather information from community, institutions, professional sources, staff & library users and non-users.
Vision? <i>Institution or community's future: Where are you going, and why?</i>	Create a vision of a better tomorrow: What is the external strategic vision?
Mission? <i>Library's future: Why? Where are you going, and why?</i>	What will the library do to make the vision happen?
Goals? <i>Measures of success: What?</i>	If you are successful, your goals will be achieved. How do you measure success?
Strategies? <i>Paths to success: What?</i>	What are the plans to meet the goals?
Accountability? <i>Who?</i>	Who is going to be responsible for doing the work?
Deadlines? <i>When?</i>	What are the deadlines for getting the work done?
Budgets? <i>How much?</i>	Resources are needed to get the work done: How much?
The tactics? <i>Tasks?: How?</i>	The assignments, the activities, the procedures, the actions and the details of how you will get accomplish the strategies.
<b>Feedback</b>	Did you accomplish the vision? Or, did you get so caught up in mission, goals, strategies, and tactics that you forgot?

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# Quick, Cheap and Decent Strategic Planning

## **First, Use Your Common Sense to Do Your *Market Research***

1. What trends will impact your communities or institutions in the next five years? (This is not about your medical library; this is about your town, hospital, university, research center, agency, community, school, business.)
2. How are the lives of the people you serve changing?
3. What are the most difficult problems they are facing?
4. What is the better future for those people and institutions in ten years? What does it look like? Sound like? What would be the different behavior of the people? Don't worry about how it will happen, a lack of money, or why today is so bad. Put yourself in the future ten years from now.

## **Second, Decide Which Three Principles Will Guide Your Decisions**

5. Do this with the entire medical library and your library users. Think of the values that are important to you and your medical library: access to information, lifelong learning, diversity, relevant technology, user-centered, user-friendly. Make a list of 20 such values and pick the three-to-five that are most important.

## **Third, Create A Vision/Mission Statement Based on Your *Market Research***

6. If you and your medical library leadership took the better future seriously, what would the library be doing differently to help your users achieve the better future?

## **Fourth, What Will You Have To Stop Doing To Free Up Resources**

7. You will need to focus and innovate, otherwise you will make yourself sick and crazy while you do increasingly mediocre work. Watch out for *pet projects*.

## **Fifth, What New Projects Will You Do and How Will You Measure Success**

8. What results will you achieve to reach the better future? Pick three-to-five for the year. Goals are the *what*; tactics are the daily details of *how*.

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# Planning Meeting Techniques

1. One-page strategic plan summary.
2. Working documents are one-page long.
3. Every meeting starts with the plan:
  - a. What are we going to accomplish today: tasks, decisions, delegation.
  - b. How much time do we have for each task.
  - c. What are the priorities?
  - d. Who is in charge of controlling the meeting?
  - e. Agreement that everyone speaks, no one dominates, we listen respectfully, and treat each other with good will.
4. Everyone comes prepared.
  - a. We start on time, even when significant people aren't there.
  - b. We speak only to add new information.
  - c. We speak only again only when everyone else has spoken.
  - d. We elicit the best from others.
5. We agree what will happen when projects miss deadlines or are not done correctly. Who can take a project away?
6. We are realistic and honest about what can be done with the people, time and resources we have. No martyrdom, no rescuing.
7. We invite feedback about what we need to do differently.
8. Age, credentials, tenure, education and other status issues do not give us privilege or protection from constructive criticism. Legitimate authority and universal respect is the key.
9. Always have the big board in the room for writing.
10. Allow time for mistakes.
11. Create a transition ritual at the beginning.
12. No sidebars or non-meeting business.
13. Have snacks.
14. Operate transparently.
15. If the plan is in your head, there is no plan.
16. Avoid the Victorian mindset. Instead, use technology, write in bullets, reduce useless ritual, speak concisely, avoid elitism, laugh lots.

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# One Recipe for Innovation

1. What is the better future that your medical library users want?
  - a. What are their new expectations of success?
  - b. What are their biggest concerns?
  - c. What do they spend most of their time doing?
  - d. What do they want to spend more of their time doing?
  - e. What technological and cultural surprises await them?
  
2. What part of their future do you plan to make your new job?
  - a. Who are your competitors?
  - b. What technological and cultural surprises await you?
  
3. What will you have to give up in order to give yourself the time and resources to focus on these new goals?
  
4. What will you have to test and possibly change about your own beliefs in order to be successful?
  
5. What do you need to learn to succeed?
  - a. What new tools will you need?
  - b. What new skills will you need?
  - c. Who will be your new partners?

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## Evidence of a Successful Plan

1. \_\_\_ Every employee can explain the mission and vision of the library in a friendly and non-bureaucratic manner.
2. \_\_\_ Every employee knows the ratios among budget, time, and quality both on specific projects and on how they are being evaluated by their supervisors regarding overall job performance.
3. \_\_\_ Every employee has input on their personal goals.
4. \_\_\_ Every employee knows the goals of specific jobs and projects and why these are important to accomplishing the mission and vision of the strategic plan for the medical library.
5. \_\_\_ Every employee has input on the constraints.
6. \_\_\_ Every employee knows the constraints.
7. \_\_\_ As long as an employee is achieving the goals within the constraints, HOW they accomplish those goals are up to them: no micromanaging.
8. \_\_\_ Your medical library has a coordinated protocol for breaking rules.
9. \_\_\_ Every employee knows they work for the users of their library, not just their department: no territorialism.

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# What You Are Going To Do Next?

What priorities will you need to identify and shift?

What are you going to stop doing to make time to work on your strategic plan?

What are three things you can do in the next week?

Who do you need to recruit or partner with from outside the library?