

STRATEGIC PLANNING

By Simon FRANCIS

1. KEY ISSUES

STRATEGIC PLANNING and the 'MARKET'

**The Library must decide where it wants
to go**

Possible strategies for the library to adopt:

Consolidation or **Market penetration** = more use of existing services by existing customer groups;

Market development = new customers for existing services;

Service development = new services for existing customer groups;

Diversification = new services for new customers.

Services and Strategies

Services

Existing

New

Existing

Consolidation

Service development

**Client
groups**

New

Market development

Diversification

What are the main risks, and how might you secure a position within such a strategy?

Product life cycle: birth, growth & death.

**Pricing = marginal, full, or market forces
(value added = profit)**

**Placing = where, when service offered &
by whom**

External pressures:

- i. Rapid change**
- ii. Reduced funding**
- iii. 'Value for money'**
- iv. Re-examination of functions**

Who serving? What subjects? What services?

Where going? (mission). What environment? (pressures). What library does, how it does it, and for whom?

Key Result Areas where success is essential for long-term viability, where improvements must be made and where effort will bring the greatest benefits.

2. The STARTING POINT

STRATEGIC PLANNING

"To plan is to choose" – J. Nyerere

"Planning is not thought, it is action"

- ?

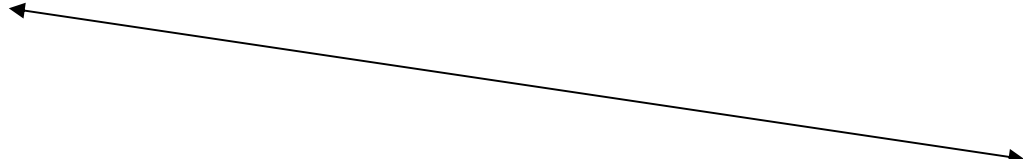
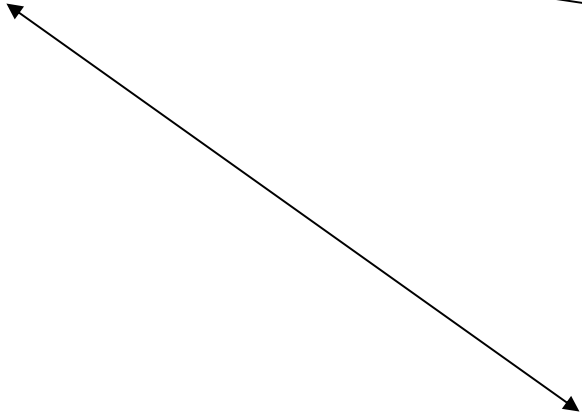
CUSTOMERS

**PARENT
INSTITUTION**

LIBRARY

EXTERNAL ENVIRONMENT

(PEST)



SWOT ANALYSIS

Strengths and **W**eaknesses

Opportunities and **T**hreats

Strong

Boom

Defend?

Opportunity

Threat

Develop?

Bust

Weak

3. WHAT, HOW & WHO?

Planning has been defined as:

the continuous and collective exercise of foresight in the integrated process of taking informed decisions affecting the future.

PLANNING:

- Ends**
- Means**
- Resources**
- Implementation**
- Control**

**The 'Information Strategy' of the
organisation.**

PLANNING PROCESS

Stages in policy development

Review - where are we now?

Values - what do we want to be?

Goals - where do we want to go?

Strategy - how do we get there?

Targets/tactics - what do we do next?

Monitoring - who is going to check progress?

Evaluation - what performance measures do we set?

TYPES OF PLANNING:

Static Planning

**Strategic or Development
Planning**

Workforce Planning

Planning is **NOT**:

- formulating intentions
- forecasting the future
- a 'wish' list
- completed with the preparation of a plan document
- an exact science

Planning IS:

- a means of fulfilling intentions**
- a means of reaching objectives within a certain period of time.**
- The identification and implementation of courses of action (strategies) required for the achievement of the library's goals and objectives.**

PLANNING STRUCTURE & STAFF

Planning staff:

**Doubt and resentment in chief
librarian are a recipe for disaster.**

Plan Co-ordinator

Single person. Good writer & progress chaser. Need not be very senior.

Planning Group

To oversee plan, monitor progress, decide priorities.

**Should have a spread of interests and views.
Reasonable authority.**

Staff participation

4. WHAT IS THE LIBRARY FOR?

The Library must decide where it wants to go.

Determine priorities, including negative priorities.

LIBRARY MISSION STATEMENT:

The vision of the Library. Should relate to the vision of the parent organisation. The long-term values, roles and hopes of the Library.

"To provide books, documents and other media to support teaching and research within the institution"

"To make a positive contribution to the education process within the institution by developing, in students and staff, the information skills which are fundamental to independent learning".

5. WHAT DOES THE LIBRARY DO?

AIMS or GOALS:

Express targets within the context of the Mission Statement.

Each aim defines the basic function of the Library in terms of one particular area of work. Clear and operational terms.

OBJECTIVES:

Convert each Aim into a series of specific actions achievable within given timescale, and measurable.

Quantifiable, timed, short-term. Key activities to achieve objectives.

The link between planning - where objectives and targets are set - and control - where performance is measured.

6. PLAN CONTENTS, and IMPLEMENTATION

Contents of the plan:

i. Foreword explaining intended readership

ii. Mission Statement

iii. Background - institutional and external factors

iv. The 'market' served by the Library

iv. Activities: Collections; Services; Equipment; Staff

vi. Executive Summary

Total pp. 20-40

IMPLEMENTATION CYCLE

Planning



IMPLEMENTATION CYCLE

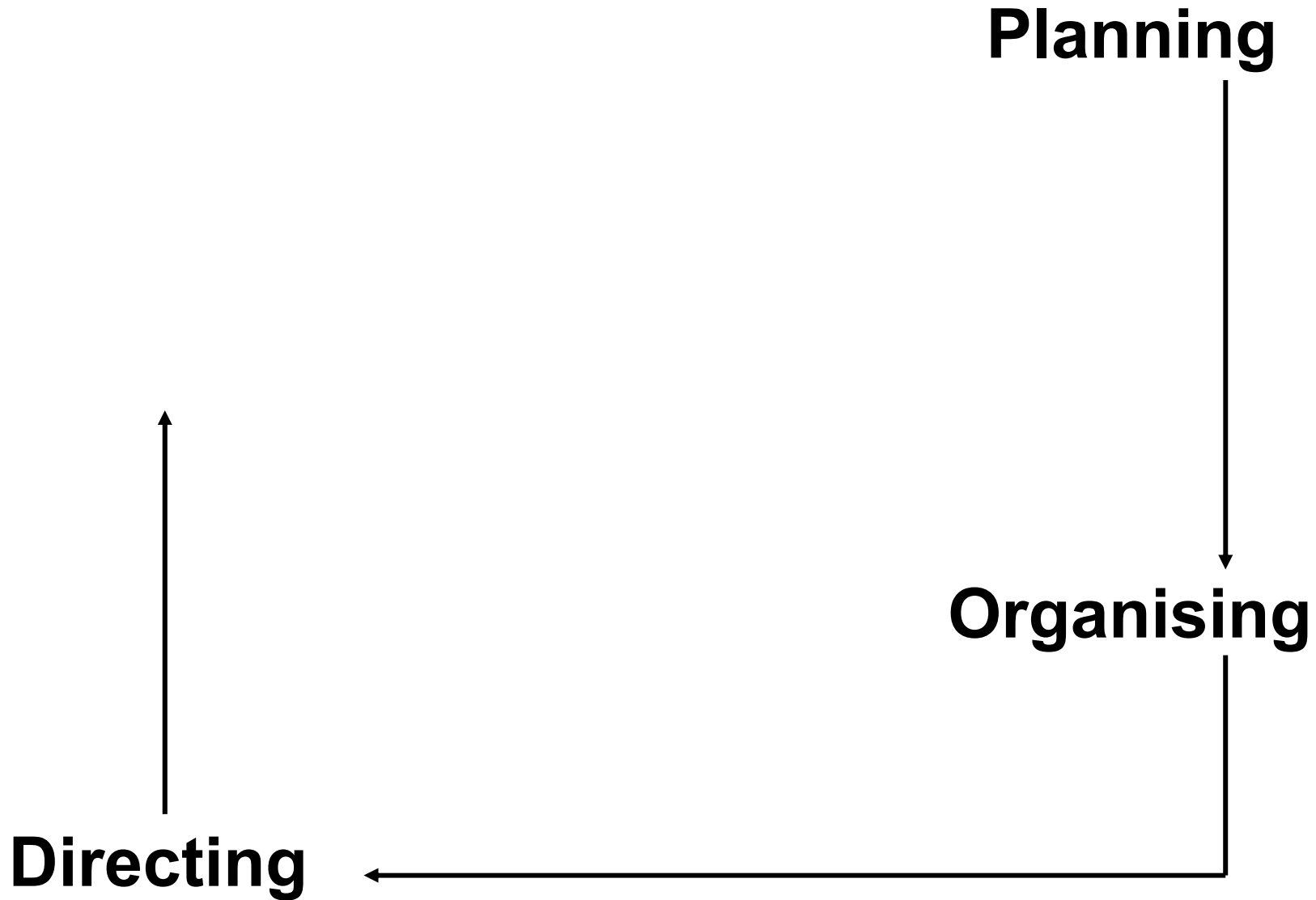
Planning



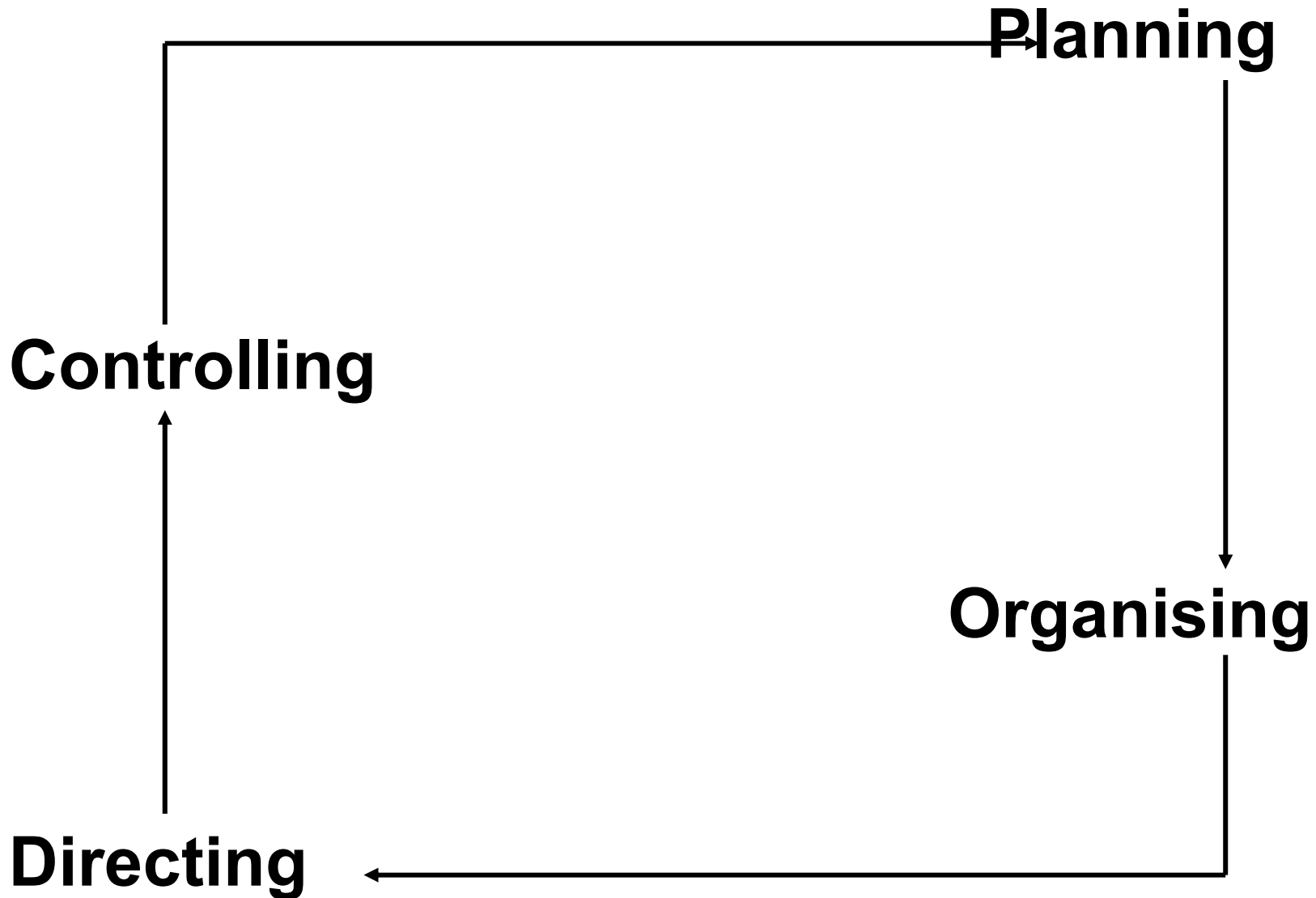
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IMPLEMENTATION CYCLE



IMPLEMENTATION CYCLE



WHY PLANNING MAY FAIL

Common reasons for **failure include the following:**

planning -

resistance –

motivation -

Successful change should have many of the following:

planning -

process -

people -

**Děkuji Vám za vaši účast na
workshopu.**

**Přeji vám všem hodně úspěchů do
další práce!**