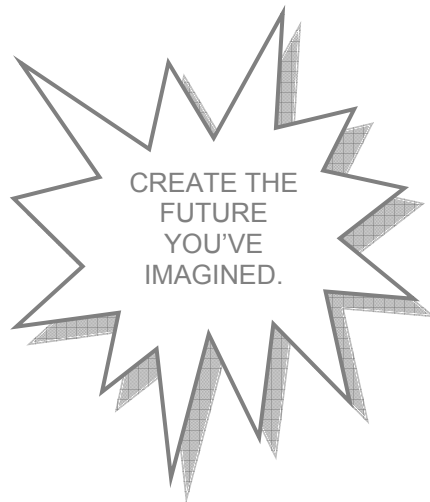


9. USING THE PLAN TO ACHIEVE THE FUTURE YOU'VE IMAGINED



While the completion of the written plan signals the end of the planning process, it also signals the launch of the implementation phase. Having invested significant time and energy into Essential Planning, it is time to turn your attention to making the most of that investment. This requires a commitment, on the part of board and staff, to use the plan as a navigational tool. Any effort to improve any aspect of the library, from now on, needs to be in keeping with the plan. This requires, first and foremost, familiarity with the contents of the essential plan.

9.1 Communicate, Communicate, Communicate

Once the plan has been finalized and endorsed by the board, even before publication, share it with staff and volunteers. In addition to circulating the plan in writing, it can be extremely beneficial to engage staff in conversation, giving them the opportunity to collectively and individually tie their work to the contents of the plan. This initial communication needs to be augmented with continual references to the plan in writing and at staff meetings. A practice of making the library's plan mandatory reading for any new trustees and staff (at all levels) serves to make them familiar with what the library is striving to achieve. It also gives them an opportunity to ask questions, leading to further conversation about the contents of the plan.

As soon as the plan is available as a published document, work hard to 'get it out there' in the community. Starting with Municipal Council, get yourselves invited to as many meetings as possible, and present the library's essential plan. Be flexible and creative about tying the library's plans to the concerns of other community groups and agencies. Discovering a shared agenda can be a powerful incentive in altering people's views of the library's role and importance in the community.

Do everything you can to make the library's plan a news story that catches the interest and support of the local media. Develop key messages arising from the contents of the plan and use those messages to raise the profile of the library in the community.

Finally, make copies of the plan available in the library and post it to the library's website.

From the Files

In 2006 Pelham Public Library won a Peter Drucker Innovation Award for the successful implementation of its strategic plan. The nomination was submitted by the local field consultant of the Ontario Trillium Foundation, Mr. Manfred Fast. In his nominating letter, Mr. Fast outlined the many reasons for the success of the plan, including the extent to which it was communicated to all stakeholders, integrated with overall library service, and aligned with community issues. Particularly noteworthy, according to Fast, was the way in which the Library Board and staff used the plan to advocate the need for more resources to make the library more capable of meeting the growing service demands of the community. Staffing, collections, and technology were all significantly improved during the life of the plan, and due to there being a plan that offered an appealing future for the library.

9.2 Align the Library's Resources to the Plan

The budget implications of activities named in the plan are important considerations in developing future budgets. However, it is a mistake to have the entire plan rest on new funding. There has to be a willingness to realign and reallocate current resources, so that initiatives named in the plan can proceed. At the same time, it is important to keep in mind that the plan only addresses new activities and the library must also continue to fund ongoing programs and services. While this can be a challenging balancing act, most library budgets have a portion of its budget, however small, that can be used to implement new strategies.

9.3 Implement, Integrate and Evaluate

The core work of implementation is that of tying the tasks identified in the plan to individual performance and ensuring that those individuals have what they need to be successful. This can be a complex undertaking, requiring coordination of information coming from a number of directions and involving several people.

A reasonably efficient, orderly approach to connecting the direction provided by the plan to the particulars of who is going to do what to make it happen is to generate a chart-based implementation tool. The chart would name every task from the plan, duly numbered according to strategic direction and objective, and provide space for the further delineation of the smaller related tasks, along with responsibility and timeline. It is important to consult widely before establishing timelines. This ensures a realistic balance of workload and facilitates buy-in, with everyone agreeing to contribute to the successful implementation of the strategies outlined in the plan (see Appendix 18 for a sample). Such a tool is also an opportunity to identify benchmarks or measures of progress and achievement, making it a helpful resource in the ongoing monitoring and evaluation of the plan.

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The regular monitoring and reporting of progress and success is an important aspect of implementation. Many library boards receive an update on planning activities on a quarterly basis; others prefer to include it as part of every meeting. It is a local decision, keeping in mind that regular reporting provides valuable information about progress and the reasons for lack of progress. Such information facilitates further action, as needed, and/or a revision of the plan.

It is worth determining ahead what data to collect to tell yourselves that you have made progress in improving some aspect of the library; that you are successfully serving the community and/or current library users. Remember to look beyond the purely quantitative measures to include important qualitative anecdotes and impact statements that speak to the experience of a positive change. Remember, also, to celebrate and publicize success, large and small.

As much as the essential plan is not intended to shape the continuation of core services, unless those services are being changed in some way, it is a good practice to integrate the full range of programs and services into an overall, appealing vision of library service. Such integration facilitates the coordination of everything the library does, making all of it relevant to the library's purpose and direction. Ideally, every member of board and staff knows the mission and vision, aiding the work of integration and the cohesive development of library service that is striving for success, as described in the vision.

“Make an effort to bring the vision and goals of your strategic plan into the ongoing activities of your group, even though these regular activities are probably not specifically mentioned in the plan. Whenever possible, use the goals you've stated in the plan as a reference point for everyday decision-making. Referring to the plan can actually enhance your group's ability to respond creatively to new information or unforeseen circumstances, rather than being a limiting factor.

Sally Holterhoff, “Strategies for Implementing a Strategic Plan: Making Sure Your Plan Doesn't End Up on the Shelf.” *American Association of Law Libraries Home Page*, 29 August 2006, <www.aallnet.org> (February 2001)

9.4 Navigate the Way to the Future

In addition to the pro-active scheduling and coordinating of activities named in the library's plan, it is important to reference the plan in reacting to new and changing circumstances. In some cases, the plan provides clear direction to emerging trends and issues, even those unanticipated when the plan was written. Board and staff can readily agree on an appropriate course of action that is in keeping with the direction of the plan. In other cases, it happens that emerging realities require a revisiting and revising of some pieces of the plan. Almost always, the revisions happen at the level of objectives or tasks. Libraries rarely confront a change that challenges purpose or vision, at least in spirit. Likewise, revisions to the strategic

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directions are infrequent, as they are usually broad in nature and sufficiently rooted in the vision.

As important as the plan is as a guiding force in managing a successful foray into the future, flexibility is crucial. The purpose of planning is not to lock you into a course of action, but to plan, as capably as possible, based on anticipating changing circumstances. As new realities emerge that differ from those anticipated, it is necessary to consider the full range of possible responses to the situation. Sometimes that means deviating from the plan. Usually, such deviation is relatively minor, and represents mapping out a new route to the desirable future captured in the plan, rather than deviating to an entirely different future.

An unfortunate, but all too common, reason for deviating from the plan is lack of resources necessary to carry out the activities outlined in the plan. Even the most fiscally responsible library boards are occasionally caught short and denied funding they were expecting. The shortfall sometimes requires a revision to library activities, especially new initiatives that were being planned.

It also happens that an unforeseen opportunity presents itself, an opportunity that might have gone unrecognized without the existence of an essential plan, or at least without the strategic or big picture thinking that went into the plan. Having articulated mission and vision, and having identified the strategic directions that will contribute to achieving the future you've imagined makes it considerably easier to see and capitalize on exciting possibilities for enhancing library service as they appear on the horizon. This is Essential Planning at its best: Moving the library into new territory, pro-actively making changes purposefully, to improve library service, while also reacting thoughtfully and responsibly to changing circumstances.

Newcomers to the planning process sometimes make the mistake of thinking of it as a one-time effort, almost something to endure in order to say it has been done. As planners become more familiar with the process, however, and more proficient at thinking about mission and vision, identifying strategies, and understanding the changing context of library service, they understand the cyclical, ongoing nature of Essential Planning. Ultimately, once you've been through the process a number of times, and experience the improvements and enhancements that result from it, planning almost becomes a frame of mind. You develop a strategic awareness that makes it second nature to assess new information about the library and/or the environment in which the library exists in relation to the library's purpose and direction. The end result is better decision-making and a greater effectiveness and capacity in the planning and delivery of library service.