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<td>Author(s)</td>
<td>Ferguson, AW; Sidorko, PE</td>
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Strategic Planning for Research Libraries

Peter Sidorko and Tony Ferguson
Outline 概要

• Planning 计划
• Strategic planning
• Environmental Scanning
• Environmental Scanning Examples
• Group Assignment 小组作业
Planning

计划
Planning

• Planning is the conscious predetermination of courses of action.
• Making things happen that may not have.
• Attempting to control the future.
• The function of everybody in the library.
• A process of logical decision making.
Planning for 各方面的计划：

- Direction 方向
- Consistency 一致性
- Innovation 创新
- Action 行动
- Efficiency 效率
- Performance 绩效
- Evaluation 评估
- Change 转变
Strategic planning
Strategic planning

• Strategic planning is a model of planning that places greater emphasis on creativity, innovation and intuition, where events are anticipated rather than reacted to.

策略规划是一个更侧重于创造，创新和直觉的计划模式，在此过程中，我们会对事情作出预测而不是作出反应。
Strategic planning 策略规划

• Strategic Planning is a long-term approach, and incorporates the library’s missions statements in determining the library’s future direction and the strategies and resources required to make progress towards mission achievement.
Strategic planning steps 策略规划步骤

• Establish the ground rules (participation, task force, timeline, etc)
基本规则 (参与、工作小组、进度表等等)
• Develop mission statement
立下使命宣言
• Conduct an environmental analysis (eg, PETS)
进行环境分析 (例如，政治、经济、技术及社会文化)
• Resource analysis (strengths, weaknesses - SWOT)
资源分析 (优劣机危)
• Identify strategic issues (library’s future)
找出策略议题 (图书馆的未来)
• Define future strategies (where library is going)
定出未来策略 (图书馆往哪走？)
• Decide on programs (how to get there – projects)
定出方案 (如何到达那里 — 各项计划)
• Implement and plan to evaluate (success?)
实行和计划评估 (成功与否？)
Strategic planning elements

Mission

Vision

Goals

Objectives

Actions, change and innovation through Projects
Environmental scanning

Effective planning can only be done if you know the *environment* in which your library operates!
Environmental scanning

• Libraries operate in unique environments
  图书馆在独特的环境中运作

• These affect the way a library performs, the services it provides and the markets in which they operate.
  这些环境会影响图书馆的表现、提供的服务及其运作的市场。

• As these evolve, their impact will vary over time.
  由于环境的演变，其影响将随时间而变。

• Therefore, it is necessary to scan the environment regularly.
  因此，我们需要定期地对环境作出分析。
PETS Environmental Scan
环境扫瞄

- Political 政治
- Economic 经济
- Technological 技术
- Socio-cultural 社会文化
PETS Environmental Scan

• These 4 areas will impact the way an organisation performs, the services/products it provides and the markets in which they operate.

• As these are evolving, their impact will vary over time.
How to do a library environmental scan

- Find someone else who has done it (eg, OCLC)
- Maintain awareness of professional developments
- Maintain political awareness (local and beyond)
- Attend conferences, courses, seminars etc
- Talk to colleagues
- Read lots
- Look at what the competition is doing – borrow liberally.

图书馆怎样做环境扫瞄

- 找一个曾做过环境扫瞄机构 (例如：OCLC)
- 保持对专业发展的认识
- 保持政治觉知性（本地及以外的）
- 参加会议，课程，研讨会
- 与同事讨论
- 多阅读
- 看看竞争环境 – 开放地借鉴
Environmental Scan Examples
“provides a high-level view of the information landscape, intended both to inform and stimulate discussion about future strategic directions”

对信息状况发表深入的见解，以期让读者了解未来策略的方向并激励这方面的讨论

1. Research & learning (Political) landscape
   研究和教学状况
2. Social landscape 社会状况
3. Economic landscape 经济状况
4. Technology landscape 技术状况

http://www.oclc.org/reports/escan/
Horizon Report (2010): Key trends

• The abundance of information resources challenges the way education must perform its business.

• People expect to be able to work, learn, and study whenever and wherever they want to.

• Work of students is increasingly collaborative by nature, and there is more cross campus collaboration between departments.

Horizon Report (2010): Critical challenges

• The role of the academy — and the way we prepare students for their future lives — is changing.
• New scholarly forms of authoring, publishing, and researching - need new metrics.
• Digital media literacy continues its rise in importance.
• Institutions focus more narrowly on key goals ($s)$
Horizon Report (2010): Technologies to Watch

- Mobile computing
- Open content
- Electronic books
- Simple augmented reality
- Gesture-based computing
- Visual data analysis
Scholarly Information Practices in the Online Environment

- Reports on “the state of knowledge on scholarly information behavior”
- “And how they differ among disciplines”
- Identifies “directions and … priorities for development of digital information services”

Political environment

Economic Environment

Socio-cultural Environment

Technological Environment

Your Library

们的图书馆
**SWOT analysis as a planning and change tool**

优劣机危的分析作为计划及转变的工具

- **Strengths and Weaknesses (internal)** 优势和劣势 (内部)
- **Opportunities and Threats (external)** 机会和危机 (外部)
Strengths (internal)

• Strengths are the resources and capabilities that can be used as a basis for competitive advantage:
  – commitment to staff excellence
  – commitment to customer service
  – long established – brand recognition
  – good reputation with customers
  – well resourced with content
  – etc
Weaknesses (internal)

• Absence of strengths
  – Low staff morale
  – Poor physical facilities
  – Poorly viewed by academic community
  – etc
Opportunities (external)

• New campus expansion
• Possible partnership with Google to digitise books
• Collaboration possibilities with other local libraries for ILL, collection building and reciprocal borrowing
• etc
Threats (external)

- No longer first port of call for students
- Increasing reliance on the web for information
- Constantly declining budget
- Shifts in consumer tastes
- etc
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<th>STRENGTHS</th>
<th>WEAKNESSES</th>
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<tr>
<td></td>
<td>S-O (pursue opportunities that fit strengths)</td>
<td>W-O (overcome weaknesses to pursue opportunities)</td>
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<tr>
<td></td>
<td>优势-机会 (寻求配合优势的机会)</td>
<td>劣势-机会 (克服劣势寻求机会)</td>
</tr>
<tr>
<td>THREATS</td>
<td>S-T (use strengths to overcome threats)</td>
<td>W-T (reduce impact of weaknesses to reduce threats)</td>
</tr>
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<td>优势-危机 (利用优势克服危机)</td>
<td>劣势-危机 (减轻劣势的影响以降低危机)</td>
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Political Environment

Economic Environment

Socio-cultural Environment

Technological Environment

Your Library

They're Your Library

它们是你们的图书馆

它们是你们的图书馆
Insert Tony’s slides here
Group Exercise

• In your group, think about the 4 environmental factors: political, economical, societal, technological.

• Identify the key aspects of these environments that affect the way you manage your library.

• Report back to the class.