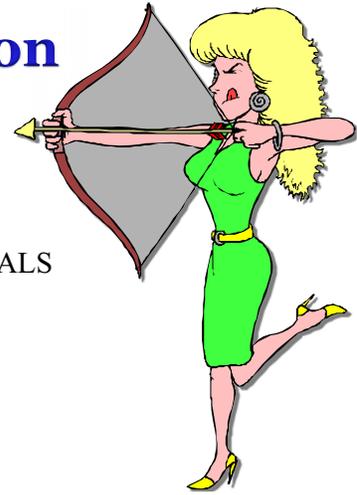


# Developing a Annual Agenda *for the* Library: Strategic Planning & Implementation



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## What are Strategies?

- Strategies are specific plans of action that excellent performers typically employ to achieve competency goals.

## What is Strategic Management? (David, 2009)

- The art and science of formulating, implementing and evaluating cross-functional decisions that enable an organization to achieve its objectives (David, 2009).

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- Strategic focuses on integrating management, marketing/accounting, production/operations, research and development, and computer information systems to achieve organizational success.

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## What is Strategic Management? (David, 2009)

- Used synonymously with the term *strategic planning* => business world.

## Purpose of Strategic Management

Strategic planning serves a variety of purposes in organizations, including to:

- ✓ Clearly define the purpose of the organization and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organization's capacity for implementation.
- ✓ Communicate those goals and objectives to the organization's constituents.
- ✓ Develop a sense of ownership of the plan.

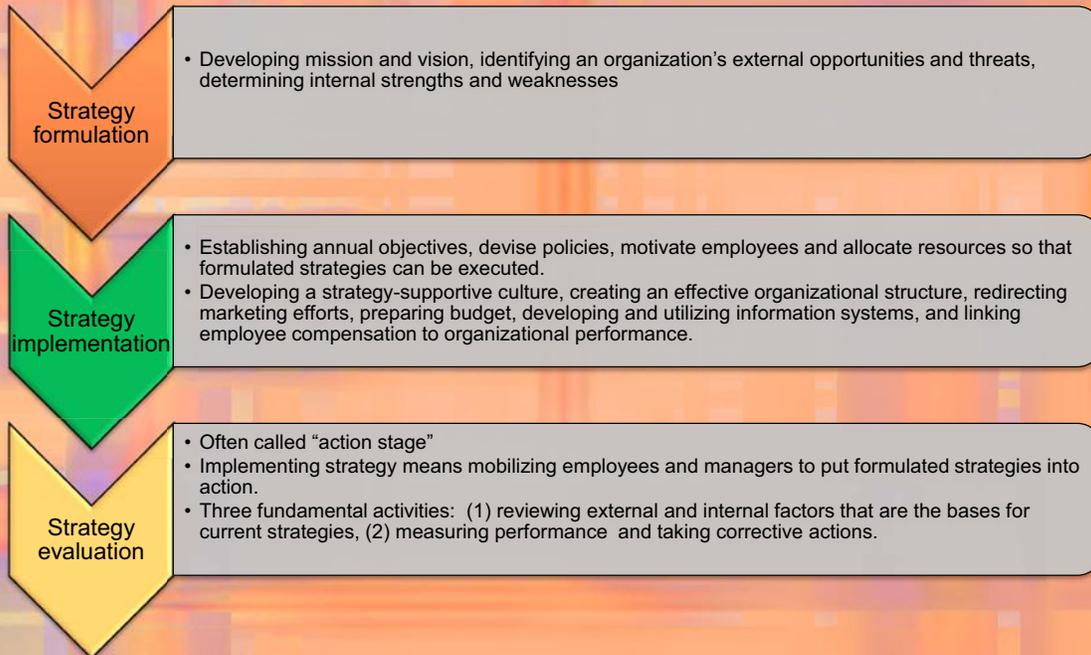
## Purpose of Strategic Management

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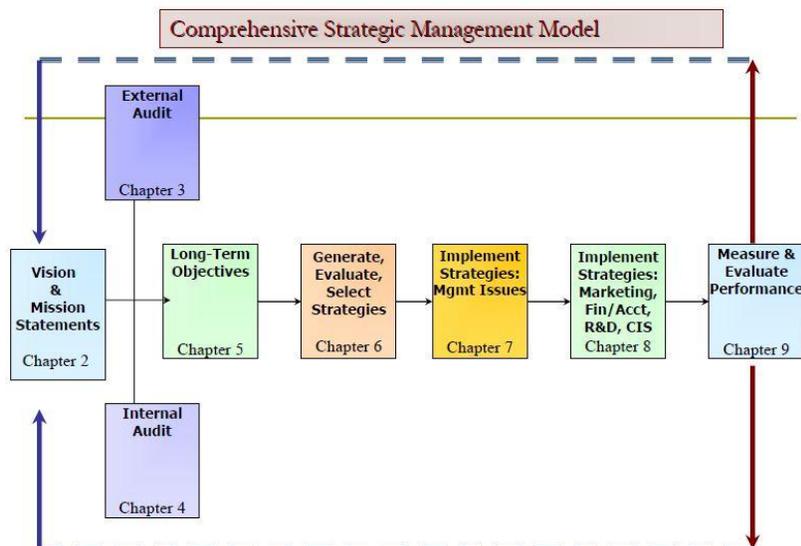
Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.

- ✓ Provide a base from which progress can be measured and establish a mechanism for informed change when needed.
- ✓ Listen to everyone's opinions in order to build consensus about where the organization is going.

# Stages of Strategic Management



# Comprehensive Strategic Management Model (David, 2009)



## Strategy Formulation

- Strategy formulation refers to the process of choosing the most appropriate course of action for the realization of organizational goals and objectives and thereby achieving the organizational vision.

## Strategy Formulation: 6 Steps

1. Vision & Mission
2. Opportunities and threats
3. Strengths and weaknesses
4. Long-term objectives
5. Alternative strategies
6. Strategy selection

## Strategy Implementation

- **Strategy implementation is the translation of chosen strategy into organizational action so as to achieve strategic goals and objectives.**  
Strategy implementation is also defined as the manner in which an organization should develop, utilize, and amalgamate organizational structure, control systems, and culture to follow strategies that lead to competitive advantage and a better performance.

## Strategy Implementation (cont'd)

- Organizational structure allocates special value developing tasks and roles to the employees and states how these tasks and roles can be correlated so as maximize efficiency, quality, and customer satisfaction-the pillars of competitive advantage. But, organizational structure is not sufficient in itself to motivate the employees.

## Strategy Implementation

- Excellently<sup>✓</sup> formulated strategies will fail if they are not properly implemented. Also, it is essential to note that strategy implementation is not possible unless there is stability between strategy and each organizational dimension such as organizational structure, reward structure, resource-allocation process, etc.

## Steps in Strategy Implementation

- Annual objectives<sup>✓</sup>
- Policies
- Motivate employees
- Resource allocation

## Strategy Evaluation

1. Review external and internal
2. Measure performance
3. Corrective action

## Adapting to Change

- The strategic-management process is based on the belief that organization should continually monitor internal and external events trends so that timely changes can be made as needed.

## Benefits of Strategic Management

- ✓ Proactive vs. Reactive
  - Initiative and influence activities
    - helps shape firm's own future
- ✓ Principal Benefit
  - Formulate better strategies
    - Systematic, logical and rational approach
- ✓ Communication
  - Key to successful strategic management

## Benefits of Strategic Management

- ✓ Financial Benefits
  - more profitable and successful
  - Improvement in sales, profitability and productivity
  - High-performing Firms
    - Systematic planning
      - Fluctuations in external and internal environments

## Benefits of Strategic Management

- ✓ Non-Financial Benefits
  - Enhanced awareness of external threats
  - Understanding of competitors strategies
  - Increased employee productivity
  - Reduced resistance to change
  - Clear performance-reward relationships
  - Order and discipline to the firm
  - View change as opportunity

## Why do some Firms do no strategic planning?

- ✓ Poor reward structures
- ✓ Fire-fighting
- ✓ Waster of time
- ✓ Too extensive
- ✓ Laziness
- ✓ Content with success

## Why do some Firms do no strategic planning?

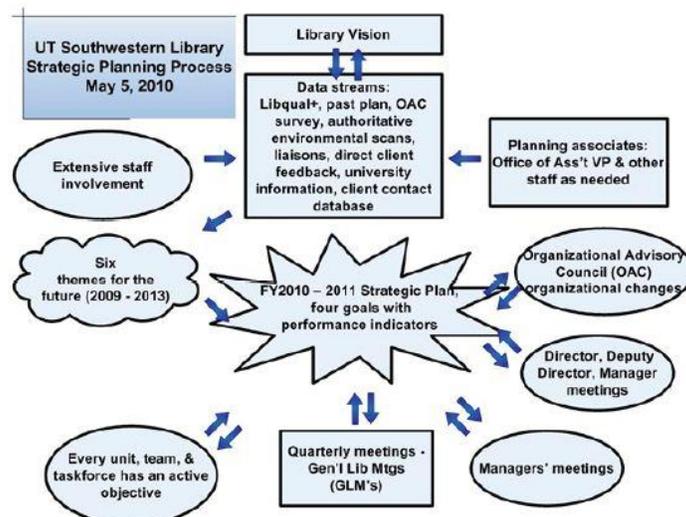
- ✓ Fear of failure
- ✓ Overconfidence
- ✓ Prior bad experience
- ✓ Self-interest
- ✓ Fear of the unknown
- ✓ Suspicion

## Strategic Management as Applied to Libraries

## Strategic planning for Libraries

- A balanced strategic planning process and plan tailored to a specific library can be an invaluable instrument that helps a library to chart and navigate these turbulent times.
- A library that just stumbles along without a solid plan will not thrive in the long term (Wayne, 2011).

### Sample Strategic Planning Process The University of Texas Southwestern Medical Center at Dallas Library



## Sample Strategic Planning Process The University of Texas Southwestern Medical Center at Dallas Library

1. The foundation of the methodology is the vision statement.
2. Cultivate multiple information streams so that the plan reflects accurate, relevant, and up-to-date information.
3. Strategic planning themes. Those are five-to-eight broad directions or concepts that will have a major impact upon the library's future—perhaps up to five years or more out. For example, is “value management—we will be aggressive stewards of library value and resources. . . .”

## Sample Strategic Planning Process The University of Texas Southwestern Medical Center at Dallas Library

4. Library planners create a set of three-to-five two-year goals. The goals should clearly delineate what the library needs to accomplish in the next two years.. . .”
5. Goals are then broken down into objectives by various library departments and individuals. Objectives detail the work to be done. They can span less than one quarter or up to multiple quarter and years.

## Sample Strategic Planning Process The University of Texas Southwestern Medical Center at Dallas Library

4. At the end of each planning cycle, there's a quantitative assessment of how well the library performed based upon the following criteria:
  - performance against goals
  - performance against schedule
  - performance against quality

## Sample Strategic Plan UNC Health Science Library

- See attached