

Strategic Planning: Library of Congress

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Description: Strategic planning within both large and small organizations has changed significantly in the past several years as business models, staffing and technology have become more fluid. This presentation will look at the recent implementation of a new strategic plan at the Library of Congress, but also address other models that might work or have been used in libraries. Related issues on plan monitoring, modification, "mining," and minding will also be covered.

Roberta I. Schaffer is a high-energy, innovative senior executive with proven success in envisioning, building and sustaining a broad portfolio of mission-critical responsibility within the government, academic, business, and non-profit sectors. Since October 2015, she has been serving as acting Law Librarian of Congress. Roberta graduated cum laude from Vassar College with an AB degree in political science/demography; from Emory University with a master's degree in law librarianship; and has a JD cum laude from Tulane University School of Law. Roberta's research interests include information authenticity and perpetual access, the concept of "authority" in cyberspace, and organizational innovation. For most of her professional life, Shaffer has been an active advocate for the arts and artists. On a personal level, she spends her time swimming daily, as a jewelry designer under the name *Cornelia's Jewels*, after the children's story, and raises West Highland Terriers as "reading dogs" to help young children learn to read.

Talking Points

Why strategic plan (SP)? To innovate, invent, initiate, inoculate, integrate, institutionalize. No real need to SP if merely wanting to do "business as usual" or keep status quo. In this case, just make and track a budget, staffing plan, and monitor/mark milestones.

Pre-condition to begin to SP is to check and affirm organization's mission, values and vision

Next step, is to undertake an environmental scan and a horizons exercise.

ES -- look at all factors that are external to your specific unit and to your overall organization that could have a measureable impact on your ability to achieve goals of a SP

Horizons -- try to determine when (at what point in time) the factors in your ES will, in fact, "hit" or impact your unit or organization.

Note: Some organizations undertake bench-marking at this point in time, as well.

What are the 3 A's of a successful SP? You have set goals that are ASPIRATION, ATTAINABLE and ACCOUNTABLE

Three traditional methods of SP:

1--Time Limited: "The Five Year Plan"

2--Entrepreneurial: Pick a unit or a project/program and then once its SP is completed take lessons learned to other units (or entire org).

3--Stepped (90-day, 900-day, and 9,000-day goals). This method is modeled after a traditional investment portfolio

What are some SP "Fail Factors"?: Disruptors (no one is like us/there is no need to change anything); Delusions (too big to fail/we have no competitors); Demons (traditional scapegoats); Denialists (no one would ever close the library)

What are some "Success Assisters"? Build consensus; work within the culture; find compatriots; have a high-level champion; identify collaborators both inside and external to your organization; benchmark competitors, but also entities that are not in your same "business line" but may have faced similar challenges (grocery; department stores; newspapers, etc)

In the end, do not take anything about the plan for granted. Visuals, look and feel of the cover, type-face--these are all critical in "selling the strategy"; particularly since these are things that everyone will see since many will never read whole or even executive summary of the full SP. Let people know by the cover image or the SP's tagline exactly what it is all about.

LC's current strategy plan cover has a stylized American Flag in denim fabric--America lives in jeans, look good/fit everyone, sturdy and strong, nevergo out of style; very flexible, etc!!!