



Title	Strategic planning for research libraries
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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

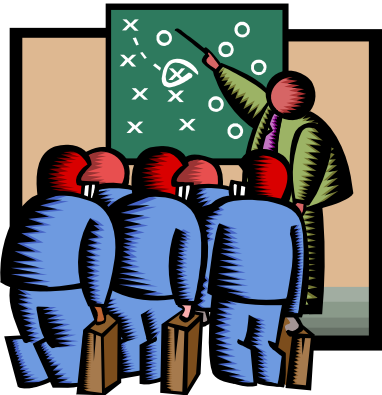
计划

Planning计划

- Planning is the conscious predetermination of courses of action.
计划是有意识的预定行动方案
- Making things happen that may not have.
使可能不会发生的事情发生
- Attempting to control the future.
尝试控制未来
- The function of everybody in the library.
图书馆所有人的职能
- A process of logical decision making
合逻辑的决策过程

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 策略规划

Strategic planning 策略规划

- 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 (如何到达那裏 — 各项计划)
- Implement and plan to evaluate (success?)
实行和计划评估 (成功与否?)

Strategic planning elements

策略规划的要素



Environmental scanning

环境扫描

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

Environmental scanning 环境扫描

- 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，我们需定期地对环境作出分析。

PETS Environmental Scan

环境扫描

- 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

图书馆怎样做环境扫描

- Find someone else who has done it (eg, OCLC)
找一个曾做过环境扫描机构 (例如: OCLC)
- Maintain awareness of professional developments
保持对专业发展的认识
- Maintain political awareness (local and beyond)
保持政治觉知性 (本地及以外的)
- Attend conferences, courses, seminars etc
参加会议, 课程, 研讨会
- Talk to colleagues
与同事讨论
- Read lots
多阅读
- Look at what the competition is doing – borrow liberally.
看看竞争环境 – 开放地借鉴

Environmental Scan Examples

2003 OCLC Environmental Scan: Pattern Recognition

2003 OCLC 的环境透视：认清前景趋势

“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

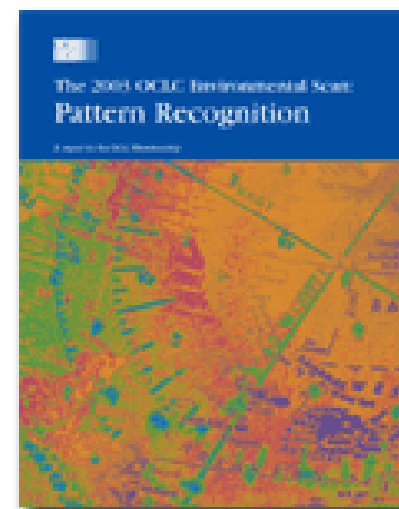
1. Research & learning (Political) landscape

研究和教学状况

1. Social landscape 社会状况

2. Economic landscape 经济状况

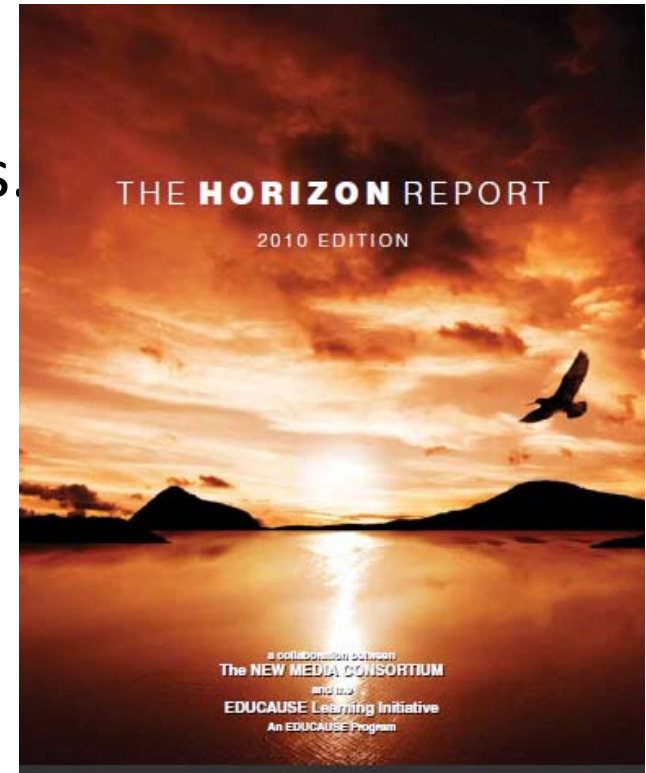
3. Technology landscape 技术状况





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

Scholarly Information Practices in
the Online Environment
Themes from the Literature and Implications
for Library Service Development

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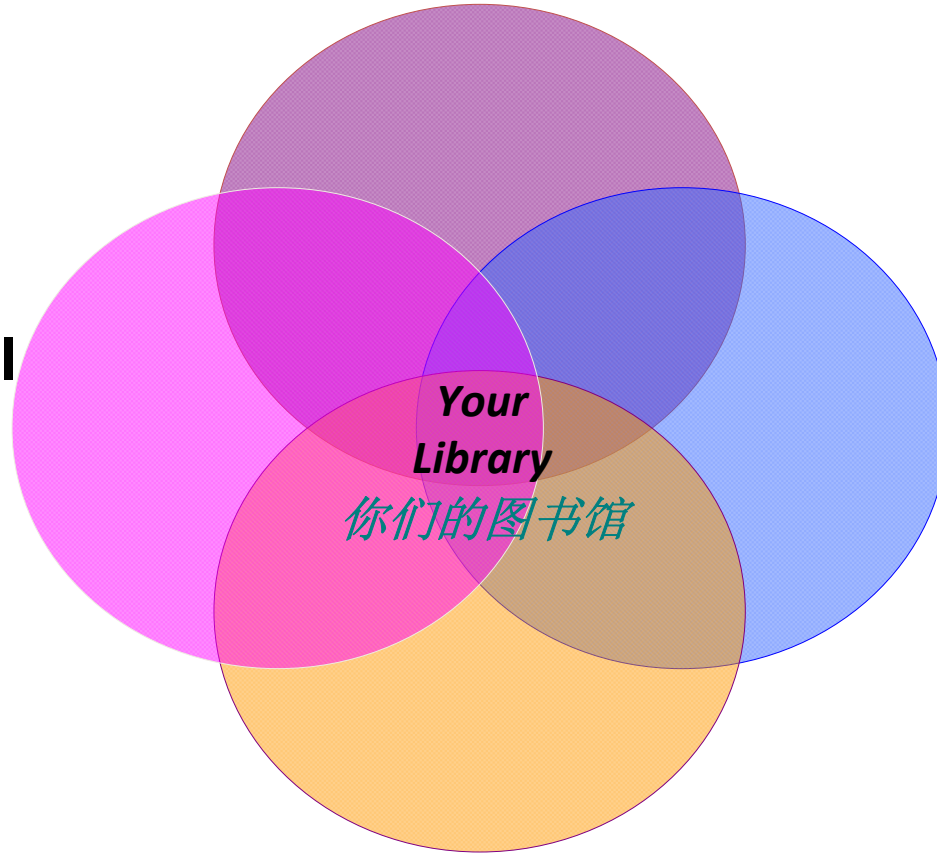
A publication of OCLC Research

- 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**
政治环境

**Technological
Environment**
技术环境

**Economic
Environment**
经济环境

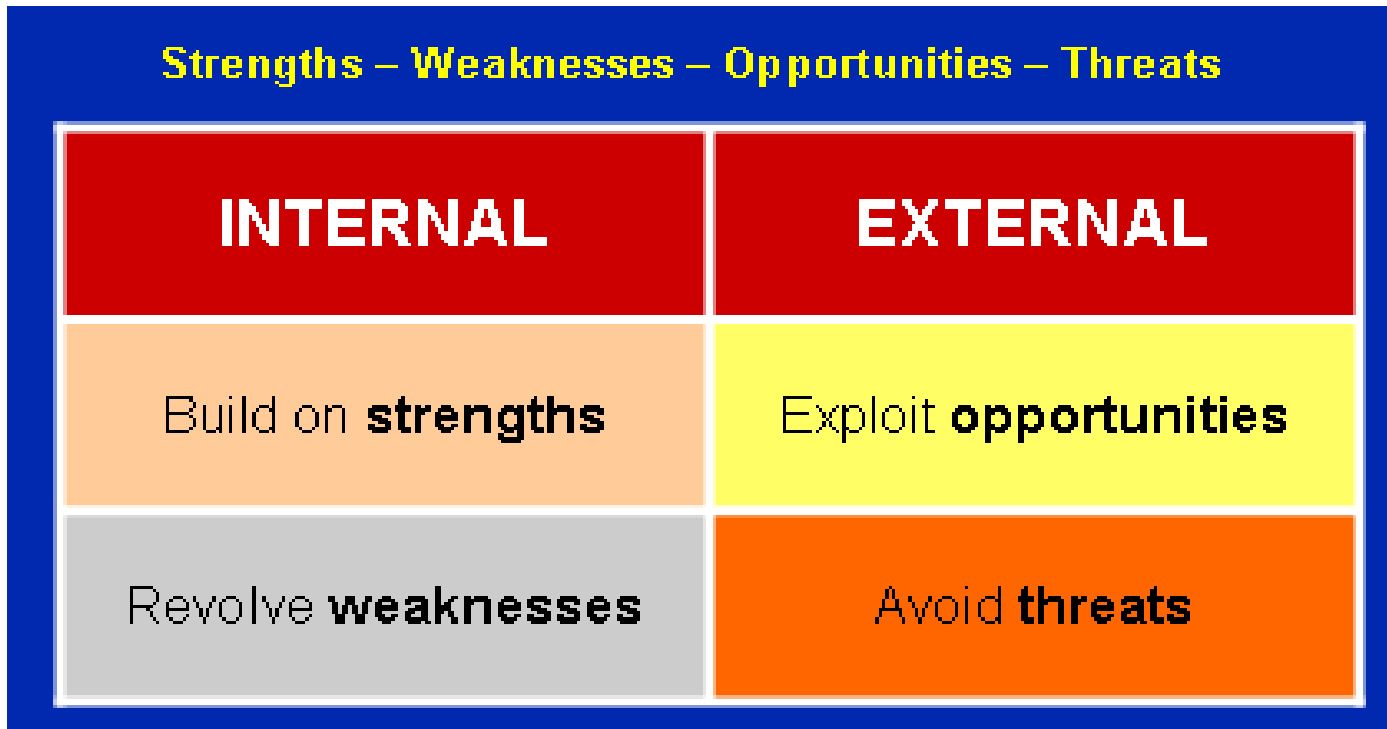


**Socio-cultural
Environment** 社会文化环境

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)

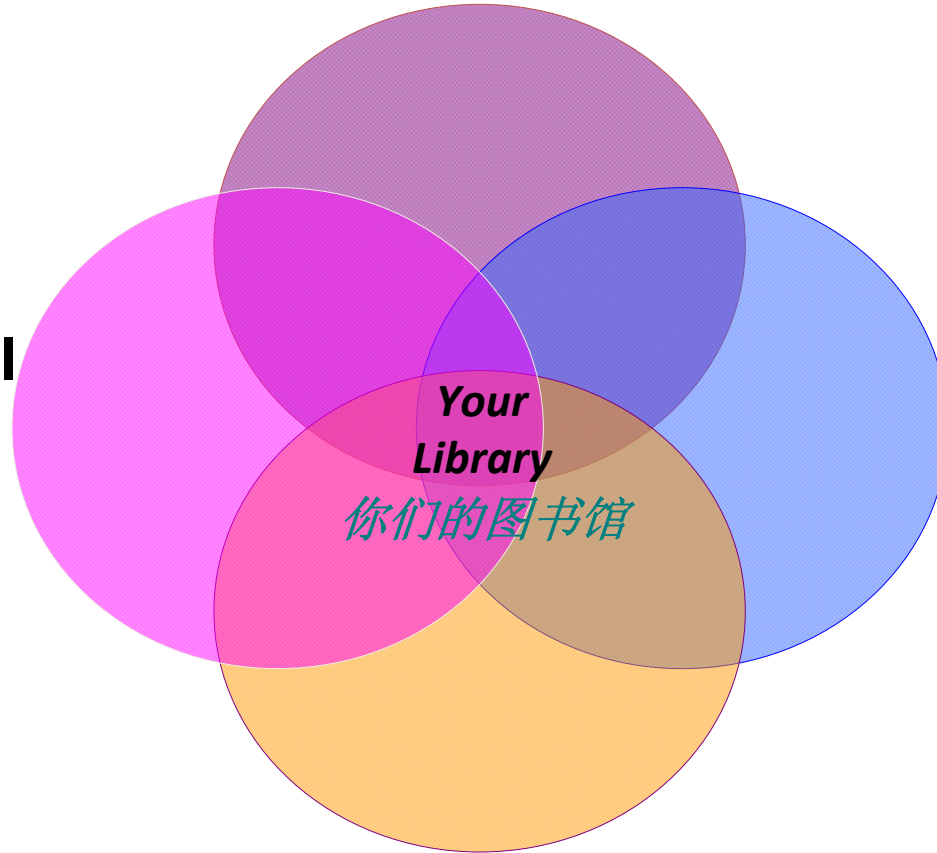
- No longer first port of call for students
- Increasing reliance on the web for information
- Constantly declining budget
- Shifts in consumer tastes
- etc

	STRENGTHS 优势	WEAKNESSES 劣势
OPPORTUNITIES 机会	S-O (pursue opportunities that fit strengths) 优势-机会 (寻求配合优势的机会)	W-O (overcome weaknesses to pursue opportunities) 劣势-机会 (克服劣势寻求机会)
THREATS 危机	S-T (use strengths to overcome threats) 优势-危机 (利用优势克服危机)	W-T (reduce impact of weaknesses to reduce threats) 劣势-危机 (减轻劣势的影响以降低危机)

**Political
environment**
政治环境

**Technological
Environment**
技术环境

**Economic
Environment**
经济环境



**Socio-cultural
Environment** 社会文化环境

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.