

# No More Strategic Plans

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# Quick Poll

When I think about my library's current strategic plan, my thoughts are closest to:

- A. This is a useful document that guides every decision we make here.
- B. I'm sure we'll pull it out in a year or two and see how we did this cycle.
- C. What strategic plan?

# About Me

- Library CEO, Berthoud Community Library District
- Owner, Cobalt Fox Strategies LLC
- Life-long planner



# Why ditch strategic plans?

- They take too long.
- They're too linear.
- They're done all at once instead of as needed.

# Drafting Strategies

- Can be drafted in a day.
- Nonlinear, and can accommodate multiple possible outcomes.
- Can be done for any aspect of your organization at any point you realize you need to draft something.
- 8 Sections

# Section 1: Purpose

- The reason you're developing a strategy.
- May not be achievable.
- Different from results and actions.

# BCLD Operations Strategy: Purpose

- To establish efficient, smooth operations that will provide a solid foundation for community development and library innovation
- To support and value staff by providing compensation, tools, space, and training to allow them to do their jobs well and care for the community
- **To provide the best return on investment we can with the resources our community provides to us**
- To build resilience into library technology and property in ways that allow the library facility itself to be a community resource

# Purpose Questions

- What do we need a clear plan to accomplish?
- Is there a problem that we're trying to solve?
- Is there a current plan?
- What objective are we trying to reach?
- Why do we need to be concerned about this at all?
- Do we need to create a routine, reduce inefficiencies, manage change, or innovate?



# Principles

- Distinct from the organization's mission, vision, or values.
- Choose three most helpful for making the difficult decisions, especially between multiple good options.
- Define the principle.

# Principles

**Order** demonstrated through efficiency, thoroughness, and excellence

administration strategy or community strategy

**Creativity** demonstrated through fun and passion

operations strategy or innovation strategy

# Principles

- Distinct from the organization's mission, vision, or values.
- Choose three most helpful for making the difficult decisions, especially between multiple good options.
- Define the principle.

# Principles Questions

- What are the main principles we'll hold to as we carry out the strategy?
- What underlying values will guide our action?
- Why do these matter for this strategy?
- What principles are most likely to help us make good decisions about this strategy?

# Information

- Two components: information we have, and information we need.
- Should be written as a list, with links if necessary.
- Listen throughout the discussion for questions, may be things to add to the information we need.

# Information Questions

- What information do we have within our organization? From outside our organization? From another industry?
- Who has personal insights?
- What do our partners know?
- What is the best way to gather and curate information?
- Where will we get our information? Are we gathering information from enough different sources?
- How will we identify bias in the information we gather?
- How will we handle the on-going need for information?

# Assumptions

- Needs to be a list.
- Don't need to correct them, just to list them.
- Assumptions can be true or false; positive, negative, or neutral; even contradictory.

# Assumptions Questions

- What assumptions are we making about this strategy?
- Do we have data that will back up our assumptions?
- How will we ensure that we're monitoring for assumptions along the way?
- Does our current set of actions mesh with what we say?
- Are there habits we need to unlearn?



# Collaborators and Competitors

- Acknowledge that we're not operating in a bubble.
- List individuals, groups, organizations, businesses, even political parties who could be working on similar or opposite goals.
- Don't bother sorting collaborators and competitors.

# Collaborators and Competitors Questions

- What other individuals or entities may have goals that align or conflict with ours?
- Can we guess what their strategies might include?
- Can we get in contact to develop strategy together?

# Quick Poll

Of the sections we've covered so far, which do you think will be the easiest for you personally to develop:

- A. Purpose
- B. Principles
- C. Information
- D. Assumptions
- E. Collaborators and Competitors

# Results

- “Prove it.”
- Should be tangible or measurable.
- Measure the right things.

# Results Questions

- What are our goals for this strategy?
- What will we see change when we adjust our actions?
- How many other areas of the organization may be impacted by a strategy shift?
- How will we know if we're working strategically?
- How will we measure progress toward our goals?

# Actions

- List, but do not number.
- List larger actions or projects, with sub-actions underneath.
- Color-coding can be helpful to track completed, in progress, and next-up actions.

# Actions Questions

- What actions do we need to take in order for us to achieve our desired results?
- If any of the actions run contrary to each other, how will we decide which ones we will take?
- What deadlines do we have?

# Roadsigns and Detours

- Changes outside our own organization that we need to monitor.
- Allow you to adjust along the way.
- Some Berthoud Library examples:
  - changes to the state property tax rates
  - AI developments
  - community growth
  - book-banning efforts
  - tax-payer complaints about how we're spending our funding



# Roadsigns and Detours Questions

- What possible events or value shifts could interrupt our actions?
- What signs will we look for that will tell us if we're getting closer to or farther from our desired results?
- What decisions can we make now that will help us when we need to shift actions quickly?
- Will these actions work in multiple possible futures, and if not, how will we know that it is time to shift?

# Final Thoughts

- Strategy documents are never complete.
- These can be assembled and implemented quickly.

# Final Quick Poll

How confident are you that you could develop a new strategy for your library?

- A. I whipped one up while you were presenting.
- B. This is doable.
- C. Amie, you lost me completely and I tuned you out.

# Contact

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