

PLA Results Boot Camp 7. Summary provided by Deb Lissak.

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Note: Copies of the handouts and the PowerPoints that support the handouts will be available at <http://sandranelson.com/bc7.html>

This was an intense, exhausting, but stimulating experience. This was the seventh year that the Results Boot Camp has been offered. It continues to evolve, especially as the pace of change in libraries increases. There were 66 participants from diverse libraries, which made for productive small group activities and practical discussions.

Although I attended to prepare for our upcoming strategic plan, really only part of one day was spent on the strategic planning process. The remainder of the week focused on all the tangential areas that can inhibit implementation and achieving results from the plan. Besides the planning process, we covered: trends affecting libraries, innovation, change readiness in an organization, evaluating activities, allocating resources, and our own personal abilities to affect change.

Trends affecting libraries

- Economy, libraries with tighter budgets, patrons with more needs.
- Mobile technology, cloud computing, digital media.
- Expectation of immediacy and 24/7 convenience.
- Physical collection and reference services decreasing.
- Ebooks, downloads, streaming—all increasing. (CD production stopping within 1-2 years?)
- Collaborative public spaces.
- Focus on content creation, both staff and public.
- Early literacy services also more creative and interactive.

Innovation

We first viewed a thought-provoking video clip of Jeremy Gutsch, blogger for *TrendHunters.com*. His keynote speech was about Smith-Corona, a company that actually invented some of the first computers but chose to stay with their typewriters because of a corporate culture that maintained, "We're the best at what we do, and everyone will always need us." Moral of the story: Avoid a Smith-Corona culture because it inhibits movement and innovation.

Next we viewed photos of 21 innovative spaces in libraries. Communalities:

- User-driven.
- NOT heavily regulated.
- Open areas, ability to drift in and out of the space.
- Interactive, experiential activities.
- Flexible, changing space.
- Very visible and visual.
- Targeted specific audiences.

- Space for patron creativity.
- Can be noisy.
- Risk-taking for the library.
- Often accomplished as partnerships with other organizations.
- Have to give up what is in existing space to try something new.

Change

- We tend to add new initiatives without looking at what we should give up.
- We think we know what people want because our regular users reinforce our status quo.
- There is a difference between effective activities, which meet our goals, and efficient activities, which are being done well but do not necessarily further our goals.
- Staff reactions to change: ~10-15% are positive about change, ~50-60% have both positive and negative reactions, ~20-30% will strongly oppose any change.
- Focus on the middle 50-60%. This group is persuadable.
- We tend to put too much effort into convincing the bottom 20-30%. Move on. Put more effort into looking for the successful outcomes.
- Factors that support a change and factors that impede a change tend to balance each other out so that we end up with the status quo. To get movement, either add more factors to one side than the other, or change the weight or importance of one of the factors. Analogy: Unless there is a compelling motivator, most dieters eventually end up within five pounds of their original weight because the positive and negative influences eventually balance.
- Support the risk-takers in your organization.

Strategic Planning for Results

- Plan quickly and get on with implementing!! Planning is about a four-month process.
- Excellence must be defined locally.
- Excellence is a moving target. Revise at least every three years.
- Planning is NOT about new staff and new funding; you have existing resources.
- Surveys and focus groups usually request more of what we already provide. They are rarely visionary.
- An outside facilitator gives the process credibility and openness to new ideas.

Strategic Planning for Results Process

- Start with a community planning committee of 12-18 members. Look for people who serve in official capacities to represent specific constituencies. Include only one staff member (someone whom other staff trust) and one board member (preferably newer and less invested in the status quo). The director provides an introductory background and observes, but is not a voting member of the committee.
- Look for community leaders from various sectors: schools, businesses, city, social services, cultural/civic groups, etc. Look for balance in geography, gender, age, ethnicity, etc. Leaders who do NOT use the library are helpful; they represent much of your community.

- Expect the community planning committee to meet twice for six hours each time.
- Do NOT ask the committee about library services. Ask them what they want the community to be ten years from now and how to get there. Have them decide in which of those efforts the library should be a key player or a supportive player.
- After the committee has chosen priorities for the community, have them review the current 18 standard library service responses (formerly were 8 library roles) and choose about 8 or 9 service responses that best suit the already defined community priorities. Forward this narrowed list to the library staff and board.
- Library staff and board do a SWOT (strengths, weaknesses, opportunities, threats) analysis and provide written pros and cons for each of the service response submitted by the community planning committee.
- The staff and board comments are returned to the community planning committee. The committee narrows the list again to those services that should be pursued. They number their choices in priority order.
- This final list is returned to the staff and board. Staff and board set goals and objectives to meet the service priorities, and then reallocate resources accordingly.
- Goals are statements of value. Objectives are measurable; they include a target audience, a target number to be achieved, and a target date.
- Organizational competencies refer to certain capacities necessary to meet your goals and objectives. Initiatives are defined activities designed to develop competencies by a specific date. They differ from objectives, which have a target audience and a target measure to be reached. By these definitions, much of our current Technology Plan is written as competencies and initiatives.

Activities

- Activities are defined as tasks that result in an output or service delivered in order to achieve the library's priorities.
- Start all activities with an action verb.
- Activities involve multiple steps throughout the entire process of planning, communicating, implementing, and evaluating.
- Activities may be public services (generally relate to goals and objectives) or support services (generally relate to organizational competencies or initiatives).
- Public service activities may be proactive (consciously chosen, promoted, with allocated resources) or reactive (not identified as a priority, but provided as requested by patrons).
- Activities also can be divided into what we must do and what we choose to do. Some activities (e.g., issue library cards) must be done regardless of the service priorities chosen. Otherwise, chosen activities should be selected only if they support the goals and objectives.
- The way to try new activities is to: stop doing some current activity, streamline some current activity, or offload some current activity to other staff.
- Learn to say "no" if an activity does not support the goals or if it is not effective.
- Agree ahead of time on the criteria that you will use to evaluate effectiveness.

Evaluating Activities

This was clearly the most frustrating part of the week for everyone. We worked in groups of four. We had the demographics and statistical information for an assumed library. Each group was given a goal and related objectives for one of the library's service priorities. We had a four-step assignment (with breaks to report and discuss between each step): list all of the activities that a typical library was probably already doing to support this goal, list new activities that the library might try to support this goal, agree on some criteria to evaluate the activities, and then evaluate the existing and proposed activities using the criteria.

This process sounds simple, but it was extremely frustrating. The difficult part was creating the criteria. We could come up with criteria, and we didn't really disagree over the criteria. We just felt at sea, as if we couldn't really nail it down to something simple and unambiguous that could be used equally for all of the activities. By the end of the morning, we were all asking why they just didn't give us criteria. And so they did.

How to evaluate the effectiveness of an activity:

1. Target Audience. Does the activity serve at least 5% of the intended audience? (e.g., If serving adults, use 5% of your adult population. If serving teens, use 5% of your teen population.) If an activity serves less than 5% of the intended audience, it is not effective. Do not evaluate any further.
2. Results Produced. The results of the activity contribute to one or more of the goals and objectives.
3. Audience Response. This is the most intangible of the criteria. It should be used only if the activity has already exceeded the percentage of target audience and is addressing one or more of the library's goals.

To compare activities that all pass the criteria, then consider further (listed in order of importance):

1. Effectiveness. Does it contribute to more than one goal? Is it essential, desirable, or supplementary to achieving the goal(s)?
2. Capacity. How many resources does it use?
3. Efficiency. All other things being equal, choose activities that take less staff time.
4. Response. How will it be received by staff and by target audience?
5. Opportunities. Consider partnerships, city priorities, ability to use volunteers, media coverage or recognition, etc.

Tips on effectiveness:

- In tracking the number served by an activity, besides total number served, it is desirable to track unique individuals rather than repeat users if possible.
- Collaborating and going outside the building generally increase the numbers served.
- Options for dealing with ineffective activities: omit the activity, reduce the resources allocated to the activity, modify the activity, or (yikes!) continue the activity.
- You cannot significantly improve an activity's effectiveness unless you allocate more resources or change a policy that is an inhibition. Tweaking times, promotions, etc., make little difference for an ineffective activity.

- If resources are going to ineffective activities, then they are not available for effective activities. Choose wisely.
- Bucket analogy: Put out one bucket for each of your activities. Take a set quantity of water. Fill the buckets equally, and each has a small—probably ineffective—amount of resources. Or, fill the buckets in proportion to each activity's importance in meeting your goals. Some buckets get more; some get less or no water.
- Go back and look at the library service responses that were not chosen as priorities. Do not put your proactive efforts into these services; only provide them reactively.
- Sacred cows are activities, policies, procedures, practices that have “always been that way” and seem to be immune to scrutiny or evaluation. If they are not effective, kill those cows!

Resources

- Right now, past experience is not very helpful for predicting the future.
- In 21st century planning, resource allocation is driven by the strategic plan.
- Resources do not refer to money or budget. Money buys resources.
- Your resources are: staff (most expensive), collection, facilities/space, and technology.
- Staff time is the biggest cost (~65-70% of budget), and it is the hardest to change.
- How much time do you really have from staff? This exercise had us subtract all the leave benefits and breaks from the annual FTE hours. The result: only 77% of scheduled work time is actually available for work, and that figure does not even subtract for meetings and incidental socializing.
- Small changes in a process can add up to significant FTE savings. We learned a process for calculating the time it takes to do a single instance of a process and the time saved by changing or omitting steps in the process. Example: Doing online patron card registration, we estimated 5 minutes savings per card. Our sample library issued 6,000 cards per year, for an annual .24 FTE savings. What else could be done with this time?
- For programs offered, calculate the cost per attendee. Include your staff costs from planning through execution.
- For databases, magazines, or any collection, calculate the cost per use.
- Do you use different holds ratios for different formats? For ebooks vs. print books? Why?
- For collection management, don't buy it or keep it if it won't get used or if it does not match service priorities. Collection is a trade off with space, one of your other valuable resources.
- Building: Keep it clean, well-maintained, and uncluttered. Trend is toward more open, flexible, creative spaces.
- Invest in staff training. What knowledge, skills, and abilities do we need to provide effective services in the coming five years?

Change, again!

- If you won't make changes, then you won't see results from your strategic plan.
- To initiate a change: Describe the desired change. Articulate why you want the change, who will be affected, who will be involved in planning, and who needs to approve. How can you strengthen the factors that favor the change and weaken the factors opposed?