

SCCLL-SIS and Strategic Planning

Overcoming Paralysis and Creating a Successful Plan

by Gail Warren

Where to begin? One of the hardest things about writing an article or beginning a big project is getting started—deciding which words will best express your ideas or which task should be done first. For many of us that same inexplicable “paralysis” applies to strategic planning. Yet, taken step-by-step, strategic planning by an individual or a library staff, or even by a Special Interest Section, can be a rewarding, inspiring, and collegial experience.

Like the leadership in many of AALL's SISs, the officers of the State, Court, and County SIS felt they needed a better sense of its direction and purpose, and a clearer understanding of member expectations in terms of services and products. The SIS needed to be better prepared to handle change and make the best use of its resources. While we agreed on these points, for a year or so the SIS never seemed to move forward; it felt like we were treading the same paths over and over. How to overcome our paralysis and achieve tangible results?

Tip #1: Prepare an agenda and distribute in advance of the meeting. In July 1998, the SCCLL Executive Board and SCCLL Strategic Planning Committee met in Anaheim on the Friday afternoon before the start of the AALL Annual Meeting. Over a five-hour period, this group of committed SIS members worked through a series of exercises and created an assignment matrix for future strategic planning tasks. Our facilitator, Brian Richards (Pathways to Excellence), provided background information about the strategic quality management planning process and outlined our workshop objectives. An agenda for the workshop and relevant background reading were mailed to each board and Committee member prior to the meeting; each individual present knew what we would be doing as a group and was prepared to actively participate.

Tip #2: Don't try to do everything the first year; prioritize, and focus one or two objectives. Members of the board and the committee, working together in small groups, answered basic questions about the mission of SCCLL, our primary services, our major customers and the way SCCLL functions. The answers to these questions and a brief SWOT (Strengths,

Weaknesses, Opportunities, and Threats) exercise furnished the foundation for a written SCCLL mission statement and issues for developing a list of performance objectives. Realistically, the members of SCCLL would not be able to complete every performance objective identified, so the final list of objectives was limited to the top three.

Tip #3: Member input is crucial to the credibility and success of the plan. Over the next eight months, members of the Committee, working in teams, completed the following steps in the strategic planning process. One team refined the mission statement and performance objectives drafted by the larger group in July; another completed a “Forecast” and an in-depth SWOT analysis; a third developed and conducted an “Environmental Scan” (survey) of SCCLL members and others; and, after all this was completed, a fourth team prepared an outline of the SCCLL strategic plan. The SIS chair, vice chair, and immediate past chair met in April of 1999 to review the data collected, analyze the results of the Environmental Scan and begin writing the full text of the draft plan. This sub-group of the larger SCCLL Strategic Planning Committee reviewed the overall goals of the SCCLL strategic planning process, looked at the associated timelines and discussed major steps necessary to implement the performance objectives. Again, the skills of facilitator Brian Richards justified the costs. As a participant, I can say that he worked with us over a two-day period, encouraging creativity, and analyzing a variety of data, without losing focus. When our discussion strayed to the lovely view outside the windows or what we would eat at the next meal, Brian diplomatically reminded us of our agenda. Interestingly, as we scrutinized the results of the SCCLL survey, we discovered our members' responses revealed a different set of priorities than those chosen by the Committee. So, the performance objectives were rewritten to reflect our members' priorities instead of the Committee's original objectives written in July 1998.

Tip #4: Break each initiative into separate tasks and assign these specific tasks to existing committees. Don't ask one committee to do it all! The final

draft of the plan was distributed to all Committee members for comment and review in June of 1999, and published in the spring 1999 issue of *State, Court and County Law Libraries News*. On Saturday, July 17, 1999, the SCCLL-SIS Executive Board unanimously approved the document, outlining the SIS's direction for the future and explaining the specific steps the State, Court and County SIS will take to ensure the continued growth and success of the section during the next two years. During 1999–2000, various committees within SCCLL will complete projects to further the three performance objectives. Each Committee chair charged with responsibility for tasks falling within one of these objectives reports on a bimonthly basis to the SCCLL Strategic Planning Committee Chair, sharing each milestone and identifying the next steps for implementation of its assigned tasks.

Tip #5: Let SIS leaders do what leaders do best. In the five months since the 1999 AALL Annual Meeting, the benefits of this yearlong process are evident. Some of the tasks have been completed, a number of our long-term projects are well underway, and, equally important, the initial synergy and excitement of the small group is now shared among SCCLL leaders and members.

Other Tips?

- Include as many of your SIS members in the process as possible. The organization's focus should be determined by the entire membership, not just an elected few. If member comments aren't submitted voluntarily, go out and get them!
- If possible, use an outside facilitator. This individual will keep the group on task, serve as an amiable “buffer” between differing points of view, and help the group move forward when it gets “stuck.” Paying for a facilitator's services immediately raises the level of seriousness about the planning process, especially when the SIS overall budget is extremely modest.
- Establish a central coordinator. With an eye on the objectives of the plan, this individual ensures regular communication between committees, and between the planning committee and the membership, serving as “traffic cop and coach.”

- Incorporate a system of accountability. As an organization “staffed” with volunteers, the SIS’s members return from the AALL Annual Meeting to their full-time positions and responsibilities. It’s easy to push that stack of SIS business to the far side of the desk or back of the drawer when the communication and contact between SIS members is infrequent. If everyone in the SIS knows that a

particular SIS member is responsible for completion of a very specific task on a specific date, the member is more likely to get the job done!

- Recognize that strategic planning is a continual process. As an *ongoing process*, it should become the vehicle for all SIS initiatives, linking the vision of SIS members to the activities planned by SIS leaders.

Please visit the new SCCLL Web site (<http://www.aallnet.org/sis/sccll>), which includes the full text of our strategic planning document.

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