

# LIBR 580

# Collection Management

Unit 9

Laurie Prange (Prange-Martin)



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# Agenda

- Focusing Activity = Streaming Video
- Taking attendance
- Lecture – 1. Demonstrating Value
  - Demonstrating Value
  - Prioritization Process
  - Reporting
- Learning Consolidation – Posting in LMS
- Next Steps

# Focusing Activity

## *Lecture 21 – Operations: Measuring Operational Performance*

*from Critical Business Skills for  
Success (The Great Courses)  
(33:34)*

# Taking attendance



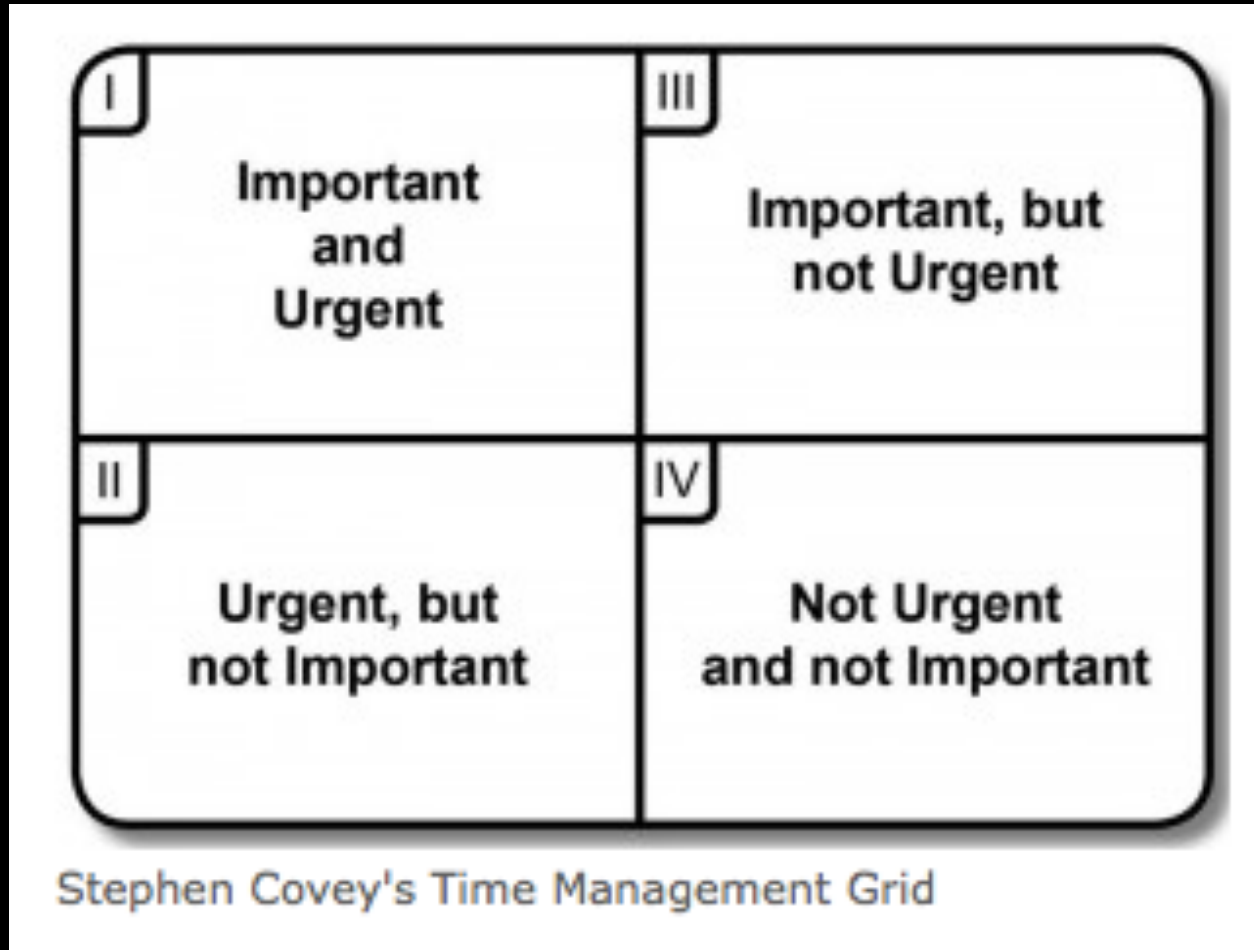
Lecture =

1. Demonstrating Value
2. Prioritization Process
3. Reporting

# Prioritizing



# Stephen Covey's Time Management Grid



<https://www.yourcoach.be/en/blog/index.php/how-to-set-priorities-stephen-covey-time-management-grid/>

As a practitioner, I think you'll find Maya Heyck-Merlin's books very helpful. I do! 😊

<https://www.thetogethergroup.com>





“A Priority Plan is a short, simple and shareable way to articulate your priorities to your manager, colleagues, and team members! Simply put, it is the way to bridge the gap between your Yearly Goals and your Weekly Short sheet. It is HOW the work actually gets done.”

<https://www.thetogethergroup.com/meetings-2/priority-plan-team-tool/>



# Priority Plan document

## Priority Plan: Policy Team

Project	May	June	July
District School & Pre-K Center Policy Handbook	<p>35%</p> <ul style="list-style-type: none"> <li>• Complete draft of all sections</li> <li>• Complete XI/Comms vetting</li> <li>• Complete up to Batch #3 SP vetting</li> <li>• Plan for external engagement (Legal, OSSS, Sups, BFSC UFT)</li> <li>• Begin Vanguard discussions</li> </ul>	<p>25%</p> <ul style="list-style-type: none"> <li>• Complete SP vetting</li> <li>• Conduct external Vetting with Legal, OSSS, Sups, BFSC, UFT</li> <li>• Integrate external feedback</li> <li>• Work with Vanguard on budget</li> </ul>	<p>30%</p> <ul style="list-style-type: none"> <li>• Complete external Vetting with Legal, OSSS, Sups, BFSC, UFT</li> <li>• Complete draft/final review</li> <li>• Work with comms on distribution plan</li> <li>• Send to Vanguard/Web-Posting</li> </ul>
NYCEEC Policy Handbook	<p>35%</p> <ul style="list-style-type: none"> <li>• Plan/Engagement with Leadership</li> <li>• Complete draft of all new sections</li> <li>• Begin edits/additions to existing sections (+ alignment w/ contract)</li> </ul>	<p>45%</p> <ul style="list-style-type: none"> <li>• Complete edits/additions to existing sections (+ alignment w/ contract)</li> <li>• Red-Line contract</li> <li>• Begin internal vetting</li> </ul>	<p>40%</p> <ul style="list-style-type: none"> <li>• Complete internal vetting</li> <li>• Begin external vetting</li> <li>• Complete distribution plan</li> <li>• Work with Vanguard</li> </ul>
Provider & Field Office Trainings	<p>5%</p> <ul style="list-style-type: none"> <li>• Brainstorm trainings</li> <li>• Development of training timeline</li> <li>• Overview of support required from evaluators</li> </ul>	<p>5%</p> <ul style="list-style-type: none"> <li>• Present training plan to DECE leadership</li> <li>• Begin training development with evaluators</li> </ul>	<p>5%</p> <ul style="list-style-type: none"> <li>• Develop trainings</li> </ul>
Policy Supprt/Q&A	<p>5%</p> <ul style="list-style-type: none"> <li>• Respond to policy inbox inquiries</li> <li>• Begin brainstorming new strategy for 2016-2017 school year</li> </ul>	<p>5%</p> <ul style="list-style-type: none"> <li>• Respond to Policy Inbox Inquiries</li> <li>• Finalize new strategy for 2016-2017 school year</li> </ul>	<p>5%</p> <ul style="list-style-type: none"> <li>• Respond to Policy Inbox Inquiries</li> <li>• Present new strategy for 2016-2017 school year to DECE Leadership</li> </ul>
Special Projects	<p>20%</p> <ul style="list-style-type: none"> <li>• Field trip policy</li> <li>• Gender integration</li> <li>• Pre-K Centers (health &amp; readiness)</li> <li>• Contract (NYCEEC &amp; Charter)</li> <li>• Blended Pre-K/K</li> <li>• Flex-Schedule Support</li> </ul>	<p>20%</p> <ul style="list-style-type: none"> <li>• TBD</li> </ul>	<p>20%</p> <ul style="list-style-type: none"> <li>• TBD</li> </ul>

<http://thetothergroup.com/wp-content/uploads/2016/08/Priority-Plan-Policy-Team.pdf>



# The famous/infamous 5-Year Plan

Would you be surprised to learn that  
this tool was first developed in the  
USSR?

# Sample 5-Year Business Plan

**Sample Strategic Plan**

<b>Vision</b> Simple Vision statement		<b>Mission</b> Simple Mission statement.			
<b>Target Customers</b> Who are your primary customers?	<b>Market Needs</b> What is it that your customers need from you?	<b>Comms Channels</b> Where will your customers find you? How will you communicate with them?	<b>Strategic Goals</b> What are your top goals?		
<b>Strategic Priorities</b>					
<b>Priority #1</b> What are your top 5 priorities for the year?	<b>Priority #2</b> Write them down.	<b>Priority #3</b> What is it that you need to achieve this year?	<b>Priority #4</b> Or what is it that you want your customers to achieve this year?	<b>Priority #5</b> Keep each point snappy and in a way that you can read it simply.	
<b>Targets</b>	<b>Target #1</b> These targets are likely aligned to your priorities	<b>Target #2</b> But not necessarily.	<b>Target #3</b> Need a prompter for your targets? Answer this...	<b>Target #4</b> What will you have achieved to know that	<b>Target #5</b> ... this year was a success?

Credit Image: bendebokos.com

Image source:

<http://studioy.us/strategic-business-plan-template/5-year-business-plan-template-professional-template-with-strategic-throughout-strategic-business-plan-template>



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# Include KPIs

## Business Strategic Plan Template

2017 STRATEGIC PLAN			
Purpose			
To be recognized as the absolute best pressure regulation supplier to the process control industry.			
2017 focus = growing sales revenues			
KEY OBJECTIVES			
Market development	Process Improvement	People Development	Product Development
INITIATIVES			
<ul style="list-style-type: none"><li>Expand regulator market reach</li><li>Increase customer visits by engineers</li><li>Review distribution strategy</li></ul>	<ul style="list-style-type: none"><li>Implement lean process</li><li>Development/Implement supply chain strategy</li></ul>	<ul style="list-style-type: none"><li>Implement personal planning process</li><li>Improve communication</li><li>Increase teamwork</li></ul>	<ul style="list-style-type: none"><li>Increase quick-change regulator line</li><li>Expand range of QPRO line</li></ul>
KEY PERFORMANCE INDICATORS			
<ul style="list-style-type: none"><li>Revenue/Distributor</li><li>Revenue/Month</li></ul>	<ul style="list-style-type: none"><li>Cash to Cash Days</li><li>First- Time Through%/Month</li></ul>	<ul style="list-style-type: none"><li>% Turnover/Month</li><li>% Absenteeism Month</li></ul>	<ul style="list-style-type: none"><li>New Product Revenue/Month</li></ul>

WWW.COMPANY.COM

Image source:

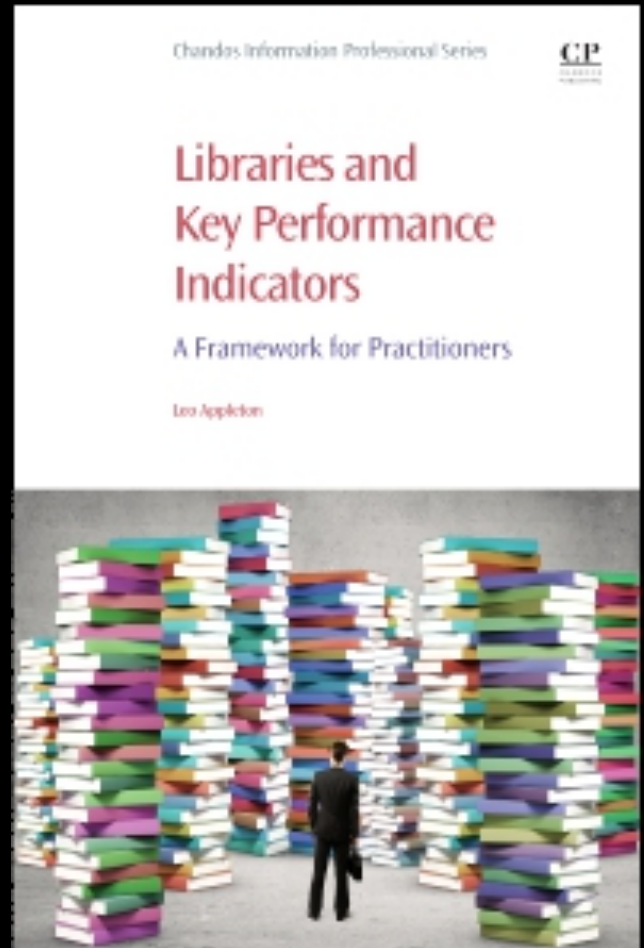
<https://www.slideteam.net/blog/business-strategic-planning-11-powerpoint-templates-you-must-have/>



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Appleton, L. (2017). *Libraries and Key Performance Indicators: A Framework for Practitioners*. Cambridge, MA: Chandos Publishing.

<http://resolve.library.ubc.ca/cgi-bin/catsearch?bid=8979219>



# Other Business Reports

- Types:
  - ✓ Accreditation Reports
  - ✓ Annual Business Reports
- Purpose: accountability, standards
- Parameters: timeframe, participants
- Tips: seek guidance on format, content, past politics

# Accreditation Reports: Format

- Background
- Staffing
- Facilities
- Collections
  - Attachment to subject professional organizations
  - Complete collection budget
  - Monographs
  - Monographs budget
  - Serials
  - Databases
  - Special Collections
- Services: ILL, course reserves, copyright, instruction, reference, partnerships
- Response to comments on previous accreditation document





# Business Report: Example

- Huntsville Public Library:  
[https://www.huntsvillelibrary.ca/en/aboutus/resources/Annual\\_Reports/HPL-2016-Annual-Report.pdf](https://www.huntsvillelibrary.ca/en/aboutus/resources/Annual_Reports/HPL-2016-Annual-Report.pdf)
- Toronto Public Library:  
<http://www.torontopubliclibrary.ca/about-the-library/annual-report-2016.jsp>

# Strategic Planning Documents

- Embedded collection initiatives & outcomes
- Purpose: visioning, community building, organizational repair
- Production parameters: input, timeframe

# Strategic Planning Documents: Examples

North Vancouver District Public Library

<http://www.nvdpl.ca/mission-strategic-plan>

London Public Library

<http://www.londonpubliclibrary.ca/page/strategic-plan-2014-2017>

UBC Library

- 2010-2015:

[http://about.library.ubc.ca/files/2012/09/StrategicPlan\\_2010.pdf](http://about.library.ubc.ca/files/2012/09/StrategicPlan_2010.pdf)

- 2016 Refresh:

<http://about.library.ubc.ca/strategic-plan/collections/>



# Strategic Planning Documents: Example

## DIRECTIONS

### MANAGE COLLECTIONS IN A DIGITAL CONTEXT

Content is our strength. As we develop the digital library we will maintain our commitment to print collections and provide powerful tools for discovery.

### GOALS

- Implement a comprehensive digitization program to provide unlimited online access to materials of research and teaching value
- Enhance and integrate access to print and digital collections to make them easier to find
- Strengthen and preserve collections to meet changing curriculum and research needs
- Achieve a stable, sustainable collections funding model

# Learning Consolidation



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# Activity: So, What?

1. Log into the LMS
2. Working independently, post your answers in the discussion “5 Years into the Future.”
3. Once all group members have posted, move to work with your Homework Group members and discuss the following questions for your project.
  - Post your group discussions only if you’re willing
  - Remember, team-based learning is useful and I don’t mark on a curve!

# Next Steps



# Next Steps

- Recommendations for Guest Judges to Community Fair?
  - This is an ideal time to network
- Keep working on...
  - DRAFT Budget
  - DRAFT Outline
  - And other parts of Cumulative report
  - Your 3-sided Poster Board for August 9<sup>th</sup>
  - <http://electrified.ca/83267.html>



# Thank you!

See you Tuesday in the classroom!

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