

**Title: The Indispensable Healthcare Library: tools and techniques for aligning your strategy with your host Trust and demonstrating your value.**

**Programme Overview:**

*How well have you understood the intent within your Trust's high level strategic plan?  
And to what extent does your own Library planning clearly align with and support that wider strategic intent?  
What further meaningful measurement might help you to provide a more powerful evidence-base around library impact in improving patient care?*

**Tightly linking your own library services strategy and plans to the Master Plan for the Trust is vital to ensuring that the value and importance of the Library in achieving the Trust's goals are valued and recognised on a wider stage.**

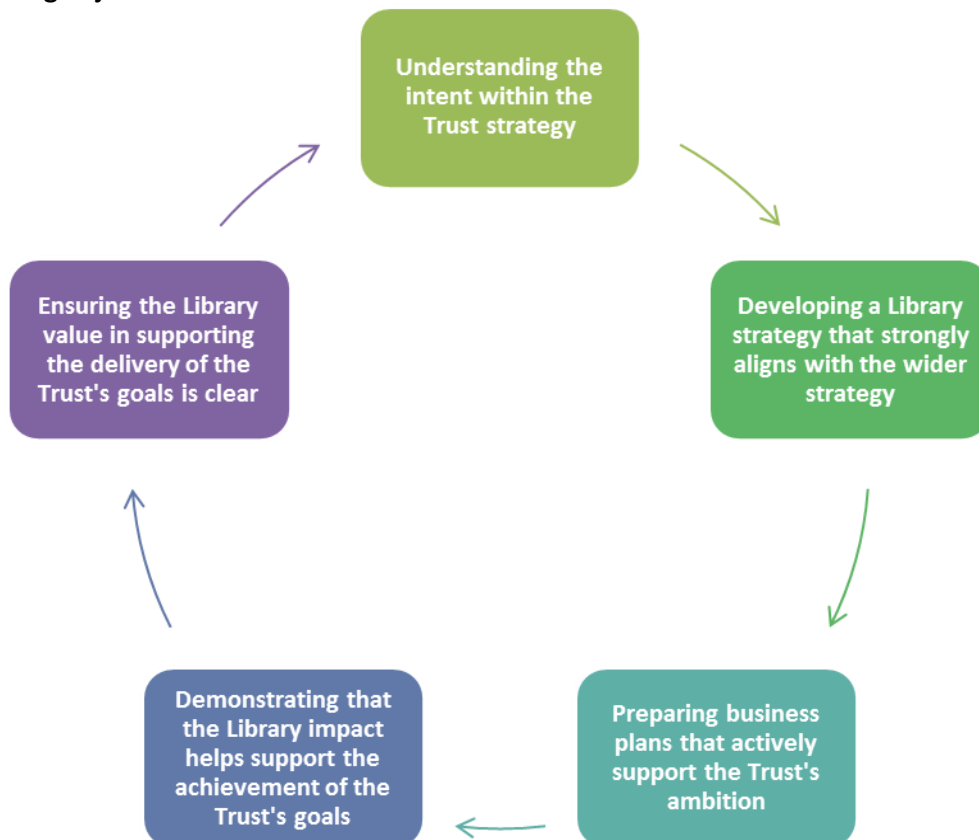
In this highly interactive, practical 3 day workshop, run on non-consecutive days over 2 months, we will cover a number of core topics, with opportunities for personal reflection and research and development work on your own Library Information Services, in-between each event

**Central objective of this programme**

To enable Library and Information Services managers to write a strategy and operational/business plan for their services which are both meaningfully joined-up and integrated with the strategy of their host Trust.

To underpin this work with a suite of relevant measures which demonstrate how the Library plays an important part in the delivery of the trust strategy.

**More granular learning objectives and work streams**



## Course Pre-work

This programme does not specifically look to teach delegates the nuts and bolts of writing a strategic or operational plan, but rather focuses on maximising and measuring synergies and value between the Library's work and the host Trust's own strategic goals and aspirations. However, there will be a 5 page booklet of pre-course reading provided. This is simply a refresher to delegates, in terms of how to go about researching and compiling a strategic and operational plan.

### Day One: 11<sup>th</sup> June 2013. Venue: Liverpool

#### Day one learning objectives

- To understand how to analyse a strategy document for key transferable content
- To review the steps one library service undertook to closely align both structure and strategy to its host organisation
- To familiarise ourselves with two planning tools which will help us anchor our strategy tightly to that of our host trust

#### Morning session: "Seek first to understand, then to be understood"\*

In this introductory session we'll start to think about the most important concerns of an NHS Trust Board in developing strategy. What are they obliged to consider? What must they demonstrate? How might they go about developing a strategy that is robust, deliverable and fit-for-purpose in the current context?

We'll look at real examples of how primary care, acute and mental health trusts set out their strategic 'stall' and what makes for a powerful set of strategic objectives. We'll also look at and learn from a case study taken from Higher Education describing the steps a Library team went through in order to tightly align its strategy with the wider University plan

#### What would this include?

**Backdrop:** In the light of the new context. What are the various patient-facing organisations there to achieve? How are they measured and by whom? What are the common priorities? Are there any trends we should be aware of in terms of the way our trusts are being tasked?

Review some strategies from MH, acute and community health trusts. Small group exercises to pick out

- How they see themselves
- How they differentiate themselves from others
- Key strategic themes
- Keywords or mantras
- 'Hero' projects

#### Strategic and structural alignment case study

Using the HE study working in small groups to create a 'journey' to undertake. The steps the library team went through. Map the journey together on a large map.

What's relevant about this to us? What can we replicate? Where will things be different? Aim: to create a shared version of the steps we need to take.

### Afternoon session: what does this mean for us?

In the afternoon session we'll look to synthesise the outcome of the morning's learnings into practical guidance for our own LIS and review a set of structures that will enable us to condense and map our own Trust strategy

#### What would this include?

Introduce delegates to 2 essential planning tools:

- A one page schematic which enables us to pull across key themes/intent from the Trust strategy and see how they can be mirrored in our own strategy in a supportive and integrated way
- A one page 'strategy map'
- Review examples of a number of strategy maps developed in health and higher education sectors

Each table could practise using these tools by adopting well known sub-brands and master brands and thinking through what the logic might look like cascading from the main brand to the sub brand (exactly same principles cascading from Trust to Trust LIS)

#### Wrap up for day one.

- Review key learnings
- Review our strategy development journey map
- Secure a commitment from delegates to
  - 1) Read their own trust strategy
  - 2) Undertake the one page 'mapping' (trusts ambitions mapped across to what their own library 'mirror' might look like)
  - 3) Write their first rough draft of their strategy map

NB: the point is not for these first drafts to be right or thoroughly tested, but for delegates simply to undertake the process for their own LIS

### Day two: 5<sup>th</sup> July 2013. Venue: York

#### Day two: learning objectives

- To review the work done since our last meeting (in outline), looking for similarities, helping with anyone who got 'stuck'
- To share an example of a cascade process from strategy to operational planning
- To review latest thinking around demonstrating impact
- To work with a useful, library-friendly, balanced scorecard

### Morning session: from strategy to reality - moving your strategy on to an operational plan which delivers the library and the Trust's intent

#### What would this include?

- Work with the HCLU plan to demonstrate the linkages between strategy and the operational plan. Break the plans down into a more visual flow diagram
- In tables, work with some quite generic trust strategies and create a line of sight from the trust strategy into the Library strategy and then into ideas which would make logical and useful operational activities flowing from the hypothetical Library strategy. Use the flow diagram as a way of us reassuring ourselves of the logic flow.
- AS or GY or LF or KW to hold one-to-ones running alongside the morning session to review where each delegate got to with the planning activities undertaken between the two sessions: check for understanding and see if any issues arisen up by undertaking the process

**Afternoon session: “...are we there yet?” Measuring and evaluating impact. Latest thinking**

**What would this include?**

- 1) Presentation, slides and interactive exercises to review
  - The demand for the right evidence
  - Putting impact into planning
  - Clarifying your objectives
  - Success criteria and impact indicators: how do you know you are making the right kind of difference?
  - Making things happen: activities and process indicators
  - Defining the right sort of evidence
  - Gathering and interpreting evidence
  - Setting targets
- 2) The balanced scorecard. Why have one? How to develop one for your own services

**Wrap up for day two.**

Review key learnings

Ask delegates

- 1) To continue their journey with refining their own strategy mapping
- 2) To develop their own variant of the balanced scorecard in the light of the new strategy they are working on
- 3) To put together 5 chart presentation for their service to be shared in the 3<sup>rd</sup> and final event

**Day three: 18<sup>th</sup> July 2013. Venue: Manchester**

**Day three learning objectives**

- To review the delegates strategy alignment work to date together
- To have an opportunity to revise and continue to refine work

### **What would this include?**

At this point in the process, delegates would split into groups with other LIS representatives from similar types of Trust: mental health, community services, commissioning, acute. (Best way of segmenting to be discussed)

Each group would move to a separate room and then each delegate would present 5 charts to their peers, the objective being to share ideas, get feedback and support and have the benefit of pressure testing a very early draft of your thoughts for your upcoming strategic and operational plans. The 5 charts would be

- 1) Background/context
- 2) One page map of the trust strategies translating over to the aligned library strategies
- 3) One page library strategy map
- 4) One page balanced scorecard
- 5) One page impact measurement methodologies

Perhaps break up with some quick exercises or snippet ideas around best practice?

Final one-to-ones running alongside the sessions to understand where everyone is now. What they need to do next to finalise and get sign off on a completed plan

### **Final wrap up.**

- Review key learnings from the 3 days
- What did people get most from the event?
- What next?
- Further help/resources required to finish-off the process

ENDS