
As libraries become increasingly expected to adopt, for a variety of reasons, corporate models for their operations and systems of accountability, the need for a practical guide for professionals undergoing the transition to such a model has long been indicated. The 163rd title in the How-To-Do-It Manual® series, *Creating Your Library’s Business Plan,* is an excellent guide to the process. Written by a former Health Sciences Library administrator, now the Development Officer for Texas Tech University Health Sciences Center of the Permian Basin, Odessa, TX, this manual is a highly suitable planning tool for any type of Library and assumes no previous knowledge of a particular Library type or any other planning process. This manual is also a unique reference in that it deals exclusively with a Library process not duplicated by any other resource in print, and is geared specifically toward the librarian tasked with planning for the implementation or development of a resource or service.

Arranged within ten discrete but sequential chapters on various aspects of library business planning, this book is a suitable resource for building a case for — and then delivering and managing — any contemporary library initiative. The table of contents is highly detailed so that the reader can easily locate practical as well as theoretical topics; the index is thorough and the illustrations add information not readily discernible throughout the text. The manual’s most valuable feature, however, is the layout of its material. Each chapter is designed so that an arrangement of text, charts, presentation examples from relevant libraries, bibliographies for further reading and summarizing tables combine to present the reader with a highly effective, readily adaptable framework for the construction of each stage of the planning process.

The chapters may be grouped within three general thematic sections: the first three chapters are philosophical in nature and provide a rationale for business planning; essentially, what makes it an effective practice. The first chapter answers the philosophical questions that any library professional charged with writing a business plan for the first time would have; it makes the argument that the business plan is an efficient mechanism by which a scheme may be focused, performance tracked and staff commitment to the plan fostered. The “Business Plan Do’s and Don’ts” outlined on pages 9-10 are a good condensation of the whole process.

The second section, covered by chapters 4-6, is a series of practical outlines and breakdowns of all components of a library business plan. Chapter 4 provides concrete step-by-step guides for building in an ongoing assessment process and includes sample worksheets, many of them Canadian, from public, special, hospital, exclusively digital, regional, and government libraries. Sample SWOT analyses are provided from a variety of library types, also with broad representation of Canadian libraries. The fifth chapter, dedicated to clarifying objectives, demonstrates why real clarity of purpose for the business plan is crucial. The answer to the question “What is it you want to do?” is shown to be the “skeleton key” to the formulation of attainable objectives. Table 5-2, just over one page long, provides a snapshot of the relationship between objectives formulated by answering this question, the key actions needed to advance those
objectives, and the criteria for determining success: it is perhaps the most practical and easy-to-adapt illustration in the manual. Chapter 6 takes the reader through a broad selection of specific examples of strategies and objectives. This chapter clarifies the sub-components of operational and other objectives, e.g., success factors, lead and support, key dates and delivery times, resource implication and risk factors.

Chapters 7 through 10, taken as a group, deal with managing the business plan across the course of its life and throughout the achievement of its projections. Chapter 7 is a primer on how effectively and efficiently to market the business plan, showing the readers how, to achieve maximum success, they must align the following elements of marketing such as research, service design, strategizing effectively, communication and evaluation with each component of the Plan. Table 7.3 is an excellent template — for almost all libraries — for face-to-face, media, publication/direct mail and electronic/web-based marketing tactics. Chapter 8 underscores the role of the library’s parent or sponsoring bodies in evaluating the business plan’s success. While there are many evaluation tools by which libraries may assess their business plans, this chapter spells out the following basics for an effective evaluation: it must ensure that objectives are met, that problems and weaknesses are identified, evidence is documented of benefit and impact, that the budget is validated, support is demonstrated, future plans are guided, documentation applicable to other projects is provided, and, lastly, that the library’s position for success is stronger than it was at the outset of the planning exercise. Worksheets 8.1 and 8.2 are tables that can be used by most libraries — with little or no alteration — to evaluate the template’s tools or objectives. Sample evaluations in this chapter are diverse but uniformly clear windows to how the success of a library business plan may be determined. Chapter 9 provides practical instruction on how to construct a financial plan that shows how feasible cost-wise the business plan may be. This chapter, as with those before it, is targeted to the new library or information service planner and may be read as a brief yet intensive course in budget management and forecasting. An excellent sample analysis of operating budget changes, with detailed lists of contributing service level increases and decreases, is provided in Table 9-8. Finally, Chapter 10 summarizes all aspects of the plan with emphasis on the management role of the executive summary and attending communication protocols. In summary, this last group of chapters addresses the most commonly underappreciated characteristics of the well-developed business plan, demonstrating how, if well-constructed, the plan can play a curatorship role in resulting library initiatives.

The manual’s accompanying CD-ROM is dense with dozens of additional sample templates and worksheets (Section 1), a wider variety of library business plan models (Section 2) and it includes a searchable single file of all business plans (Section 3).

Creating Your Library’s Business Plan could function as an excellent resource for courses in library or information management, particularly in Canada. Its only flaw, from this reviewer’s perspective, is a paucity of academic library planning examples. Superbly arranged, coherently laid out and expertly written, however, this manual is recommended without reservation as an essential tool for every library administrator, department head, service coordinator or project manager, regardless of specialization.
Jane Duffy, jane.duffy@dal.ca, Associate University Librarian, Dalhousie University, Halifax, Nova Scotia.

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