

Revisiting Strategy in a Time of Crisis

Gregory A. Smith

Abstract

The season of upheaval brought on by the COVID-19 pandemic is a critical occasion for libraries to revisit their organizational strategies. Strategy includes two complementary dimensions: alignment with the environment and the pursuit of competitive advantage. Rapid changes in the environment call for practicing strategic thinking iteratively rather than engaging in a fixed rhythm of multi-year planning. An effective library strategy displays four key attributes: (1) It responds to the concerns of diverse stakeholders. (2) It is flexible enough to adapt to emerging conditions. (3) It enacts organizational mission but can also help to reshape it. (4) It integrates with organization development to achieve success with and through people.

Introduction

The year 2020 will not soon be forgotten. Just eight weeks into the year, the World Health Organization declared the spread of COVID-19 a global pandemic (Cucinotta & Vanelli, 2020). By the end of the year, 83 million cases of the disease had been logged worldwide, and 1.8 million deaths had been attributed to it (Johns Hopkins University & Medicine, n.d.). Seeking to curb the spread of the virus, government authorities around the globe took various measures to limit social interactions, exerting significant impacts on economies and mental health (Panchal et al., 2020). Additionally, 2020 also saw racial tensions escalate in several countries, and the United States experienced a contentious fall election season.

During 2020, most organizations in the public, private, and nonprofit sectors had to cope with changes in their respective environments. Many organizational leaders found it necessary to make important decisions in a short span of time, often relying on scant or conflicting information. Under these conditions, many leaders understandably devoted significant time and energy to ensure the short-term success of their organizations, and one might be inclined to excuse them if they neglected to attend to long-term issues in the process. Nevertheless, one expert observer recently appealed to college presidents to “think beyond the current crises and, while responding to the needs of the moment, think and act strategically for the future” (Pierce, 2020, para. 31). Similarly, Strauss, Ealy, and Collum (2020) urged college and university leaders to prepare for a post-pandemic landscape that will entail increased competition.

Perhaps as much as any other feature of organizational life, budgets are—or at least should be—a reflection of strategic priorities. Accordingly, Kolbe and Staisloff (2020), addressing the higher education industry, argued that stopgap budget-trimming measures and across-the-board cuts were unsustainable and ought to be replaced by a strategic finance framework. Such an approach purposefully considers market needs, institutional strengths, and the costs of operating programs. Accordingly, the authors called for the selective application of budget reductions and increases to enable the achievement of strategic goals.

The authorities cited in the previous two paragraphs concurred that the current season of upheaval constitutes a critical occasion to revisit organizational strategy. Moreover, evidence from the past year has shown that emergent conditions not only impede the implementation of existing strategies, but they also create opportunities to pursue new ones. The pandemic and related factors led to widespread experimentation with work-from-home arrangements. Activities as diverse as education, health care, worship, and government shifted to online environments more than many people might have thought possible in such a short time. Consumers adopted new behaviors, such as reading electronic library books, consulting with healthcare providers virtually, and relying on grocery pickup services. Even if the pandemic should subside promptly, it is difficult to imagine that all of the adjustments that organizations and individuals made during a time of crisis will suddenly revert to some older version of “normal.” Therefore, leaders—including those employed in libraries of various sorts—would do well to position their organizations to succeed in the post-crisis world that will emerge.

Libraries are as enmeshed in the environment as any other kind of organization—equally susceptible to disruptive changes and just as capable of engaging with stakeholders in new ways. Developments in the library industry since the Great Recession suggest that library leaders need to reckon honestly with the forces of change (Matarazzo & Pearlstein, 2015; Nicholas et al., 2010; Regazzi, 2013). The road ahead may be turbulent, but the application of strategy principles will help to ensure that libraries can continue to create significant social value for individual users and employees as well as the communities in which they are situated. This article outlines such principles, drawing on a body of literature that is diverse as to audience (professional and scholarly), approach (theoretical and empirical), and context (libraries, nonprofit organizations, and other settings). Points of emphasis and arrangement of content are grounded in personal experience with strategic planning at Liberty University.

The article consists of two major sections. In the first section, I explore foundational questions, mostly via a theoretical lens: What are the essential elements of strategy? How does strategy relate to planning and plans? What is the role of leadership in strategy-making,

especially in crisis conditions? In the second section, I take a more practical approach, discussing four attributes of effective strategy and their relevance to libraries.

Foundations of Strategy

Defining Strategy

In the opening paragraphs of this article, I have used variant forms of the word *strategy* eleven times. Before discussing matters of strategy further, it will be helpful to define the term. Having examined dozens of relevant sources, I have found that authors generally conceive of strategy in one of two ways, either emphasizing (a) *alignment with the environment* or (b) *the pursuit of competitive advantage*. In my judgment, these two themes are not contradictory but complementary, and thus it is advantageous to consider them in concert.

Mintzberg's (1979) succinct definition has a clear environmental orientation: "Strategy may be viewed as a mediating force between the organization and its environment" (p. 25). Bracker (1980), having reviewed literature published over the course of more than 40 years, concluded that "business strategy has the following characteristics: an *environmental* or *situational* analysis is used to determine a firm's posture in its field, and then the firm's *resources* are utilized in an appropriate manner to attain its major *goals*" (p. 221). Much more recently, the *HBR Guide to Thinking Strategically* (2019) offered managers this advice: "You need to analyze how your company's external circumstances relate to its internal resources. That's the essence of strategy building: finding unique links between the opportunities and threats that present themselves to your business and your particular capacity to respond" (p. 275).

On the other hand, Rothaermel (2013) stressed the competitive theme: "A firm's strategy can be seen as its managers' theory about how to gain and sustain competitive advantage" (p. 7). Rothaermel further stated that "the essence of strategy ... is being different from rivals and thus unique" (p. 6). Applying this concept to higher education, Eckel and Trower (2019) reasoned that:

you do not have an effective strategy if you and your competitors are doing the same things. Strategy exists if some competitors choose different, if not opposite, paths. Therefore, if the opposite of your strategic choices looks stupid, then all competitors are going to have pretty much the same strategy as you, doing you little good. (Why Strategy section)

It is important to note that strategy is used in all types of organizations. A business, of course, formulates strategy to sell goods and/or services at a profit. In a nonprofit, finances play a different role, but strategy is present nonetheless; the organization seeks to achieve desired social objectives at a reasonable cost. The competitive element is clearly visible in Frumkin and Andre-Clark's (2000) affirmation: "The most critical work for nonprofits is to clarify their organization's overall strategy, defined as the unique mix of activities and values that make a nonprofit organization stand out from others" (p. 142).

These two conceptions of strategy have at least four important implications for libraries:

- *Libraries should monitor their environment intentionally.* It is altogether too easy to focus on refining existing operations and services while ignoring important external trends.
- *Libraries must acknowledge that they are in competition with others for users, funding, labor, and reputation.* Competitors include (a) other providers of information and entertainment; (b) other entities seeking recognition and financial support from governing organizations, foundations, and individual donors; and (c) other employers.
- *Libraries should distinguish between strategy and its implementation.* A organization's strategy is less durable than its vision or mission, but elements of a strategy may remain relatively constant over time. Libraries should adapt to their environments, but some adaptations may be compatible with an existing strategy, thus falling more into the realm of implementation.
- *Libraries should avoid formulating "strategies" that do little to differentiate them from rivals.* Strategies that constitute best practices, call for the imitation of peers, or merely elaborate on an organization's mission will often prove to be more burdensome than helpful.

For many readers, the notion of formulating strategy may be difficult to distinguish from their experiences with strategic planning or even the products of such efforts, strategic plans. Nevertheless, strategy, planning, and plans are not synonymous, as I explain in the following section.

Strategy, Planning, and Plans

Over the course of decades, management thinkers have devised a wide range of strategy-related tools and frameworks. Lyddon, McComb, and Mizak (2012) introduced five such resources in the span of a single book chapter: PESTEL analysis, Porter's five forces model, SWOT analysis and its variants, the Ansoff matrix, and benchmarking. By contrast,

Bryson's (2018) *Strategic Planning for Public and Nonprofit Organizations* extended to more than 500 pages, showing how labor-intensive strategic planning can be.

According to Tschirhart and Bielefeld (2012), "Formal strategic planning generally involves a series of steps that include getting ready to plan, assessing the situation . . . , linking relevant internal and external factors, identifying strategic issues, and forming strategies designed to address those issues" (p. 93). Formulating strategy in this way can seem daunting, especially in a situation that seems to pose an immediate threat. In fact, placing a heavy emphasis on planning may not be the right course of action. Eckel and Trower (2019) argued that higher education institutions pay too much attention to planning and too little to strategy. Additionally, Spruit and Dixon (2020) reasoned that "the rigid, conventional process for developing strategy hinders rapid responses to insurgent competitors and crises—a harsh reality made even more acute by the Covid-19 pandemic" (At a Glance section).

Leaders bear the responsibility of guiding organizations through the process of dealing with adaptive challenges (Heifetz & Laurie, 1997/2001). Rapid changes in the environment—even aside from the pandemic—seem to call for something other than a fixed rhythm of multi-year planning in which an organization assumes that it has the capacity to predict future developments. Rowley, Lujan, and Dolence (1997) insightfully recognized that "the end product of strategic planning is not so much to write a 'plan' as it is to change thinking and introduce a model in which ongoing decisions are made strategically" (p. 67). To the extent that an organization engages in something that resembles planning, I posit that the chief value is in the process rather than the product. Libraries, and indeed organizations generally, need to practice strategic thinking iteratively, building the capacity to carry out an effective, timely response when a crisis arises. Athletes and musicians can perform under pressure because they adhere to a regular training regimen. Similarly, an organization's success in the performance of its mission is rooted in strategic discipline—iteratively seeking to align with the environment and achieve a competitive position.

The Force of a Crisis

Although organizations, including libraries, should engage in strategic thinking as a matter of common practice, crises do present special challenges and opportunities. This section summarizes findings from four empirical studies of nonprofit organizations that shed light on innovation and strategy under stressful conditions.

Rising Competition from for-Profit Firms

As the 20th century ended, nonprofit human services organizations in the United States encountered an increase in competition from for-profit firms that were seeking a share of a growing market. Frumkin and Andre-Clark (2000) explored how the nonprofits might respond to this change in their environment. Reasoning that nonprofits were unlikely to compete favorably with for-profits on the basis of managerial efficiency, they proposed a strategy that would not only seize opportunities latent in the law, but also leverage the distinctive values that attract stakeholders to engage with a nonprofit organization. They concluded that efficiency was necessary to the performance of a nonprofit's mission, but as a means to an end rather than a source of competitive advantage.

A later study by Froelich (2012), wherein a nonprofit hospice found itself competing with a nationwide firm that had entered its local market, came to a similar conclusion. As the situation evolved, the nonprofit was able to develop and implement a strategy that led the competitor to withdraw. Froelich concluded that nonprofit organizations facing such situations should not attempt to imitate their competitors' strategies; instead, they should respond by developing a strategy that leverages strengths that are difficult to imitate, including such elements as organizational values and social capital.

Existential Threats and Innovation

Existential threats have a way of motivating organizations to adopt changes that they might otherwise resist. Besel, Williams, and Klak (2011) studied the evolution of fundraising strategies reported by Mississippi Delta nonprofit organizations during the Great Recession. Notably, some of the nonprofits were located in the area impacted by a historic hurricane, further complicating their operating environment. The researchers concluded that "as these organizations rebuild themselves from the wreckage of Katrina, they have no choice but to be creative and innovative in recruiting and retaining board members who will provide the resources and time necessary to sustain and grow their programs" (pp. 63–64). Weerawardena and Mort (2012) reached a similar finding in their study of innovation among nine nonprofit organizations operating on the east coast of Australia. In that context, a turbulent environment, including uncertainties about government funding, demanded that the organizations innovate in two related ways: developing new ways to serve their target clients and diversifying their revenue streams (pp. 94–95).

Libraries have faced their own version of upheaval over the past year. As Cox and Felix (2020) noted, the pandemic has exerted differential impacts on libraries, sometimes disrupting

change that was already in progress, and in other cases enabling change processes to proceed more quickly (para. 1). Staff and users alike have adopted new ways provisionally, but it remains unclear to what extent these changes will stick in the long term. Two generalizations seem evident, though. First, many libraries will be forced to make difficult choices due to funding reductions (Frederick & Wolff-Eisenberg, 2020). Second, those organizations whose structure and culture are most adaptable will fare best.

Attributes of Effective Strategy

In the preceding section, I explored (a) the essential attributes of strategy; (b) the relation of strategy to plans and planning; (c) the role of leaders in navigating adaptive change; and (d) the ways that a crisis compels organizations to revisit their strategy. Having laid those foundations, in the remainder of the paper I will discuss the following four attributes of an effective library strategy:

- responsiveness to diverse stakeholders
- adaptability to emerging conditions
- vital connection to mission
- integration with organization development

Given that strategy entails differentiation from competitors and alignment of an organization's resources with its environment, I do not offer any specific strategy prescriptions. Nevertheless, I am confident that the four generic attributes will provide helpful parameters for developing contextually sensitive strategy.

Responsiveness to Diverse Stakeholders

The word *stakeholder* “became popular in the management literature as a deliberate play on words to challenge the notion that corporate decision-makers should take into account only the interests of stockholders” (Flicker, 2014, para. 2). According to Crosby (1991), actors or groups must satisfy at least one of two criteria to qualify as a stakeholder: “a) the interest they take in a particular issue and, b) the quantity and types of resources they can mobilize to affect outcomes regarding that issue” (p. 2). Organizations engage in “stakeholder analysis ... to indicate whose interests should be taken into account when making a decision” (Crosby, 1991, p. 1). Significantly, Bryson (2018) made the bold claim that “if an organization has time to do only one thing when it comes to strategic planning, it ought to be a stakeholder analysis” (p. 127).

All libraries have multiple stakeholder groups. Even in the smallest of libraries, funders, staff, and users are usually different. My library's most important stakeholders include library employees, students, university administrators, vendors, other libraries, and faculty members. Each of these groups defines the library's success somewhat differently. By implication, each library must identify its stakeholders, understand their diverse concerns, and develop strategies that address those concerns in a balanced, coherent manner.

In a systematic literature review, Miller (2018) found that nonprofits' strategic management activities arise not only from the demands of funders, but also from the influence of various other stakeholders. Thus, even though funders hold an organization's purse strings, they do not unilaterally control its strategy. Instead, a nonprofit's strategy is the product of tension between the interests of individuals or entities that may have no intrinsic connection to one another. When leaders formulate strategy, they have to account for factors such as "technical workability, political acceptability, alignment with important organizational philosophies and core values, and ethical acceptability" (Tschirhart & Bielefeld, 2012, p. 103).

Interestingly, whereas differentiation is theoretically a source of competitive advantage, organizations within a field have a tendency to conform to a similar shape—a phenomenon that is known as institutional isomorphism (DiMaggio & Powell, 1983). A library is not a free agent devoid of influence from other libraries or from the general sense of what a library is or does (Smith, 2014). Deephouse (1999) tested the tension between differentiation and conformity perspectives in a study of commercial banks, validating that "firms seeking competitive advantage should be as different as legitimately possible" (p. 148). As library leaders develop and implement strategy, they must find equilibrium between many different attraction points: innovation that responds to the needs of various categories of users, the costs that funders are able and willing to bear, regulatory influences, the cultural norms of the parent organization, and legitimacy within the field. Failure to respond to these diverse interests has the potential to generate conflict and dissatisfaction.

Adaptability to Emerging Conditions

The capacity to adapt nimbly to changing conditions is the second attribute of an effective library strategy. Bracker (1980) wrote that business strategy emerged following World War II due to the emergence of "a more rapidly changing and competitive environment" (p. 219). Ironically, the pace of change and the level of competition have only increased in the past 40 years, rendering older approaches to strategy obsolete. In short, the horizon that one can foresee has gradually shortened, while the certainty of anticipated future developments has

continued to decrease. In this environment, fixed plans have become decidedly less useful, while approaches to strategy characterized by more flexibility have emerged. In the following paragraphs, I will introduce some of the alternatives that have gained traction in libraries.

Scenario Planning and Futures Thinking

According to Friga (2020), “scenario planning is essentially a future-oriented exercise whereby strategic planners envision different scenarios and then identify key operational and strategic dimensions for their organization that would require specific actions under the different scenarios” (para. 2). Not only has this strategy tool seen much use in military and business environments (Friga, 2020), it has also been employed in the library world (Mathews, 2014, p. 455; Staley & Malenfant, 2010). Ludwig, Giesecke, and Walton (2010), who applied it to the field of academic health sciences libraries, provided this rationale for its use:

We have no oracle to tell us what kind of world will result from the interplay of forces impacting our libraries, but it is possible to envisage plausible futures. Scenarios are tools; not an end in themselves. None of them will come to exist exactly as they are described, but the future is likely to contain some elements from each of them. (p. 34)

Mathews (2014) situated scenario planning within the broader field of futurism, which “involves constructing different possible outcomes based upon several logical, and sometimes random, paths” (p. 2). Gorbis (2019) encapsulated futures thinking in five principles:

- Forget about Predictions.
- Focus on Signals.
- Look Back to See Forward.
- Uncover Patterns.
- Create a Community.

Neither scenario planning nor other futurist tools can predict the future, but they can help library leaders recognize what could happen, assess whether such events are likely to occur, consider how they might alter the landscape, and prepare to respond constructively if they materialize in some form. If scenario planning can help a library envision external changes that might affect it, design thinking—the subject of the next section—can help it ideate and implement innovative responses.

Design Thinking and Rapid Prototyping

Library work entails opportunities to design many interrelated elements: library services, physical spaces, digital interfaces, organizational structures, programs of instruction, and more. Not surprisingly, design thinking has exerted a significant influence on library practice, especially within the past decade or so. According to Bell (2010), “design thinking is about helping people and organizations to solve their problems for long-term satisfaction, not achieving efficiency for short-run gains” (para. 2).

Prominent design firm IDEO contributed significantly to the design thinking movement in libraries by creating materials branded as “Design Thinking for Libraries” (IDEO, 2015a, 2015b). IDEO’s approach to design thinking stipulates three processes: inspiration, ideation, and iteration (Fosmire, 2016). Iteration entails the initial creation of a minimum viable product and its subsequent refinement through a series of rapidly sequenced tests and enhancements (Edson, 2015, Slides 69–93; Meier & Miller, 2016). Meier and Miller (2018) have documented recent uses of rapid prototyping in the Penn State University Libraries.

Design thinking and rapid prototyping can lead to much quicker change than traditional strategy methods. These approaches are rooted in principles of creativity, and as such, they can follow unexpected paths. Implementing them requires participants to embrace new rules and roles. Managers may feel threatened by what they perceive as losing control of the strategy process, but, in many cases, the outcomes justify accepting this discomfort.

Vital Connection to Mission

A third attribute of effective library strategy is its connection to the organization’s mission. According to Tschirhart and Bielefeld (2012), “strategy ... is the critical link between the general aspirations expressed in vision and mission statements and the more specific goals that direct day-to-day operations” (p. 109). In other words, strategy is typically the means by which an organization enacts its mission. It follows that an organization will typically evaluate strategic issues based on their likely impact on the performance of mission (p. 101).

Horvath, Brandtner, and Powell (2018) studied the financial experiences of a random sample of nonprofit organizations during the Great Recession. Specifically, they examined how two variables—whether an organization had a strategic plan and whether it had a mission to serve the poor—predicted financial outcomes such as changes in spending and insolvency. The researchers found that mission and strategy shaped nonprofits’ responses to the downturn. Organizations with a strategic plan were less likely to become insolvent, and those with a poverty relief mission were more likely to increase their spending in a time of financial distress.

They concluded that mission and strategy orientations become routines that influence how a nonprofit responds to its environment.

Although strategy normally follows from mission, under certain conditions, strategy can actually reshape an organization's mission. For example, the opportunity to capture revenue can entice a nonprofit to expand the scope of its work—a phenomenon referred to pejoratively as mission creep or drift (Brown, 2016, p. 226). However, according to Tschirhart and Bielefeld (2012), an important component of strategic planning is the examination of mission and values, and this process can legitimately result in their redefinition (pp. 85, 94–95). Additionally, strategic management may help a nonprofit to recognize that the lack of financial support for a particular area of work is a threat that justifies the reorientation of mission (Brown, 2016, p. 226).

As can be seen from this brief discussion, the relationship between strategy and mission is complex. Developing strategy requires organizations—including libraries—to make difficult choices: According to Rothaermel (2013),

Strategy is as much about deciding what not to do, as it is about deciding what to do. Because the supply of resources is not unlimited, managers must carefully consider their business strategy choices in their quest for competitive advantage. (p. 6)

The alignment between strategy, mission, and the environment needs regular attention. A coherent strategy is one that achieves integration between multiple aspects of the organization's operations, including services, people, financial resources, technology, facilities, marketing, and data. Furthermore, it makes little sense for an organization to deploy strategic innovations if it lacks the capacity to sustain them over time. McGinniss and Burkholder (2018) argued that libraries face constant pressures to innovate, but sustaining innovations requires maintenance in four related domains: resources, energy, platform, and vision. Formulating and implementing strategy may be difficult, but it is critical to keeping a library focused on activities that create high value for its stakeholders.

Integration with Organization Development

In this article, I have given several indications that strategy development is not merely a technical process, but one that is fundamentally intertwined with the human dimensions of an organization. For example, I have noted (a) that effective leaders rise to the occasion when their

organizations face adaptive challenges; (b) that planning—the substance of which resides in collective experience—is more valuable than a fixed plan in preparing an organization to respond to a dynamic environment; and (c) that using creative techniques such as those entailed in design thinking requires participants to adapt to new rules and roles. These insights all point to the fourth attribute of effective library strategy: the necessity of integration with organization development.

Mierke and Williamson's (2017) narrative of leading change in the library at the University of Saskatchewan gave a clear account of the connections between an organization's culture and its capacity to respond to environmental change. As Mierke and Williamson explained, "the process to develop a new strategic plan was the first step in setting a new organizational vision and direction, and was also a first step in readying the organization for a shift in its culture" (p. 5). Such connections are far from coincidental, as evidenced by Wayne's (2011) description of a medical library's planning experience:

The strategic planning system that has been briefly described in this article did not evolve overnight. It developed over a number of years and was modified to accommodate emerging technologies and changing client and staff needs. It required a culture change for the UT Southwestern library staff. (p. 15)

Organizational dimensions were also prominent in Brenner, Kear, and Wider's (2017) description of the strategic planning process implemented in the library system of the University of Pittsburgh: "Our new process is participatory, inclusive, and transparent; it engages the entire organization with planning results; it uses a lifecycle model with distinct stages over the planning year; and it features a mix of continuing and new participants" (p. 28).

As important as I regard strategy to be, I am aware of its limitations, and I recognize that the quality of an organization's culture is more critical (Edson, 2015, Slides 3–6, 16, 33). In the context of dynamic change and intense competition, an organization must succeed with and through its people. Along with Walters (2018), I suggest that efforts to improve culture and manage strategy should proceed hand in hand. One approach to organizational change that can advance both objectives simultaneously is Appreciative Inquiry (AI)—a positive alternative to problem-focused thinking. Dabbour and Kott (2017) documented the advantageous use of AI in library strategic planning at California State University, Northridge.

Conclusion

Libraries exist in dynamic environments and compete for financial resources, staff, users, and reputation. The events of 2020 have altered patterns of change, highlighting that it is essential for organizations to adapt along with their environments. In our quest to formulate and implement effective strategy, we can learn from theory, research, tools and techniques, and experience. As discussed in this paper, effective strategy is responsive to diverse stakeholders, adaptable to emerging conditions, vitally connected to organizational mission, and integrated with organization development. Attending to strategy will not make a crisis go away, but it can help a library sustain valuable contributions to its community through times of turbulence and calm.

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Gregory A. Smith (greg@liberty.edu) is Associate Dean, Library Technologies & Collection Services at Liberty University.

Published: November 2021