

## Chapter Two

### ***Making the connection—The Chaos Strategics Planning Process—is a conversation about change, chaos and creativity***

The Chaos Strategics Planning Process is the start of a conversation about planning. The conversation begins when we acknowledge we are in a time of great tumultuous change and need to plan, craft and see our way forward. We need to have the end in mind; that is, what is our outcome and what is our endgame? The process, as in all processes, is valuable in part for the time it takes as this may enable us to pause, step back and reflect, converse, imagine, and create new as we move forward and plan and construct the future world we want. In planning it is valuable to adopt a holistic approach that encompasses kaleidoscopic thinking – where we can envisage in our mind’s eye a long view or high level perspective so that we can consider many possibilities and not overlook our blind spot. In the previous chapter we took a journey through the literature on the value of chaos theory and chaos as creativity. I believe considering chaos as creativity is a perspective that helps us to think about chaos as an abstract principle – up in the clouds at 30,000’, as the saying goes. The Chaos Strategics Planning Process will help organizations dealing with planned and unplanned changes and this is where the connection to chaos is useful. Change is cyclical, continuous and dynamic and to deal effectively with change one needs to adopt a problem-solving approach. The Process is intended to be helpful to inspire thinking, conversation, creativity, mindful planning and enable mapping our future plan. Now we will take a look at the overview of the Chaos Strategics Planning Process.

*Mapping  
your  
world*

First some background, Kenneth crafted the working title Chaos Strategics for the planning process. The planning process outlined is loosely tied to deterministic chaos theory from mathematics (Kenneth's discipline). The Oxford English Dictionary (OED) provides the etymology of chaos and chaos as related to math is defined as:

Unpredictable, apparently random behaviour exhibited by a dynamical system governed by deterministic laws, typically considered to consist of frequent instability, aperiodicity, and the occurrence of widely diverging outcomes corresponding to small change in the initial conditions of the system.

(OED)

As well, in the OED, the noun "strategics" has multiple origins and is partly Latin and partly Greek. The OED defines strategics as "the art, practice or science of military strategy" (OED).

We discussed strategies for managing change, and consider planning is a continuous, cyclical and dynamic process. Kenneth was mindful that we be provocative with the title for the planning process and break from the standard use of the term strategic planning. He chose to use "strategics" because it is a noun. I can say for certain these definitions for chaos and strategics, from the OED, resonated with Kenneth as he understood the mix of art, practice and science from his study of philosophy and

mathematics. He was also a proponent of the OED and always sought the etymology of the language he used. Kenneth's thinking and ideas are evident in the Chaos Strategics Planning Process, and the original diagram (Appendix A) is presented in the appendix with explanatory notes. The diagram evolved over time through our discussions stemming from his love of mathematics, philosophy, history and literature. He continuously challenged the status quo and was provocative.

## ***Overview of the Chaos Strategics Planning Process***

### **Introduction to our “InfoWorld”**

Our world has been transformed into a globally information reliant society and a knowledge based economy that is characterized by major technical, economic, political, and social changes. While the transition to this new economy has been recognized for some time, the implications are only beginning to be recognized with regard to everyday life. In this new “InfoWorld” all sectors of our economy, both private and public, require greater access to information than ever before.

The education sector, specifically the higher education sector, has also been transformed as part of this new information and knowledge based economy. As a result, educators and researchers require access to timely and relevant information to support informed decision-making, solve educational problems and support research. There are many factors that are impacting education and the use of information. In Ontario the distinction between College and University is blurring, as Colleges were

given the opportunity to grant baccalaureate degrees in specialized areas of study in 2000. In the Ontario college sector programs are developed to provide skills based training and continuing education based on needs identified by local industry. College curriculum is developed locally and information skills, such as information literacy, are integrated into program curricula to enable students to effectively use information while gaining experience in solving practical, applied problems. The applied curricula model utilized by the college sector is also founded on the principles of problem-based learning. In the university sector the use of information is an integral part of the inquiry process, encompassing the broad spectrum of teaching, learning and research across the sector. Information literacy skills have been identified by the Ontario Council of Academic Vice-Presidents (OCAV) as critical learning outcomes for university completion. Throughout the curricula documents, information literacy is a prerequisite for success in all subjects, for preparation for work and further education, and for lifelong learning.

This changing information environment, particularly digitized information and virtual access to it, influences both organizational structure and how educators access and use information and in turn impacts how libraries in all education sectors deliver services to meet changing needs. In order to gain strategic advantage, learning to use information effectively is a critical skill for all learners in the continuum of education in primary, secondary, post-secondary and higher education.

Accordingly, academic libraries must be periodically restructured like the word “disruptors,” this word has negative connotations (about cutting positions) to deliver services to all of these stakeholders. For our education institutions a continuous cycle of managed change will be necessary to support changing needs for teaching, learning, and research. Kenneth and I refer this process as a cyclically modulated framework. The Chaos Strategies Planning Process uses the term “chaos sphere” when referring to the framework. Modulation refers to the process of adding intelligence to the base environment throughout its life cycle.

Our transformed information world, “InfoWorld”, has also greatly altered the role of the professional librarian and library staff roles. The conceptual metaphors that describe the role of the librarian in the changing environment are “an architect of information sources and services, and a client consultant.” (Wilkins, 1995, p. 48). The challenge for organizations and service delivery structures within them, such as libraries, is to successfully regenerate organizational frameworks that can respond to the many transition and transformation influencing factors affecting them and to create an environment which manages change easily and cost effectively for continued success.

Kenneth and I have combined our many years of experience and expertise to develop a process model that supports the strategic needs of libraries to adapt to and manage change. This model is dynamic, responsive and cyclical in its application. Since the environmental framework for libraries and the framework of influence are dynamic

not static, we refer to these frameworks as chaos spheres or chaos frameworks. The term “chaos” is used in its technical sense, borrowed from chaos theory, where the behavior within a sphere is reasonably well defined by initial conditions and the influences on that sphere are not random. In this sense it does not suggest complete disorder but does stress the presence of the variability of events which need to be managed to maintain order. The behavior of inertial and projected frameworks processed and developed in the model will be characterized as deterministic chaos frameworks. The Chaos Strategics Planning Process is a methodology for designing organizational frameworks or “chaos spheres” which are responsive to change, orderly, effective and manageable. Once the complete cycle of the model has been processed another cycle begins, where the realized end game becomes the new initial or inertial framework. The model can be applied to many organizations.

### ***Rationale for strategics***

The chaotic nature and growing complexity of the library chaos sphere (environment or framework) presents a difficult challenge for leaders charged with the responsibility for administering services, allocating resources, and adapting to and managing change.

Success depends on managing events rather than being managed by them, and therefore it essential to develop well-constructed and documented strategic plans and initiatives that are flexible, responsive and optimize the use of available resources. These plans must also allow for any meaningful intrinsic or extrinsic knowledge to be

applied to the strategic process. A complex delivery service such as a library is a non-static, complex and dynamic environment (a chaos framework or chaos sphere). In this environment the strategic planning process needs to be cyclic, simple, easy to use and flexible.

Many of the components of these chaos spheres interact with one another and can be best visualized using an illustration as shown in (Figure 2). A chaos sphere is a dynamic strategic framework or environment which identifies any given service delivery model with all of its influences and the resources to provide those services. The term “Framework” is not used directly to identify a given organizational environment since it implies a rigid structure rather than a more flexible structure as identified by the technical term chaos. Using the term chaos in its technical sense does not imply a random structure or process. The butterfly effect will not necessarily apply in the technical sense. However, small organizational changes or influences may cause a significant change to the existing structure and this is conceptually the idea or principle behind the butterfly effect. chaos spheres are strategic organizational entities or sub-entities that consist of a set of defining characteristics referred to as “Strategic Characteristics”. A library, for example, is a sub-entity chaos sphere within a university, school district, college or a branch of a public library.

### **Historical perspective**

Before looking forward let us review the historical perspective of libraries as institutions. In my dissertation completed in 1995, a Frame of Reference for the

Changing Library Environment was constructed that provided a theoretical structure to synthesize symmetrically and thereby capture the changing role of the librarian and the library as an institution from the perspective of the past and present and enable a projection to the future. Of interest here is the construct from the past:

The library environment for the past may be characterized according to the following major components: the role of the librarian [which] is conceptualized with the metaphor “a custodian of books”. (The librarian provided access to information, collection management, client services, linkages with defined skills and expertise). Library collections, technology and user’s needs are also major components. (Wilkins, 1995, p.76)

In this construct of the past the scope of the role of the librarian and the library environment were limited but always service oriented.

The librarian provided access to information that dealt with recorded information, primarily books and manuscripts. Information was stored locally and was from current and archival library holdings. Collection management focused on selection, organization, and preservation of all library materials for library users. There were several themes from the construct of the past that are relevant for our discussion and

development of our planning process. The relevant themes are the service orientation directed toward both users' and institutions that libraries served. As well, librarians were cognizant of the need to preserve and organize materials for both current and future users. Future orientation or thinking was a dynamic element of the role of the librarian.

Maintaining awareness of user needs enabled librarians in the past to create a relevant library environment. Traditionally, libraries as an institution have been one of the key support structures that hold and deliver information to the user community. Thus, a process for ongoing planning was seen as valuable to the "InfoWorld" going forward.

A search of the literature regarding library planning revealed numerous models and key concepts that can assist in the planning process. In Bednarz (2007) a survey of key models is provided. One example is the systems model, which has a long history going back to the time of Aristotle, and is focussed on the internal environment of the library. Later, in open systems theory the interdependence of the internal environment and the larger system it serves is acknowledged and is evident in the equilibrium theory reported by Bednarz (2007). In the various models Bednarz (2007) the question of "how to deal with the future?" is raised. The CSPP is process that focuses on contextualizing and documenting the current organizational environment, identifying transition and/or transformation factors that are influencing

that environment and with the benefit of analysis, a new projected future environment is synthesized and mapped.

## **Guiding principles that inform the Chaos Strategies Planning Process**

The Chaos Strategies Planning Process begins by establishing a contextual foundation with several guiding principles that inform the Planning Process. These principles are foundational and relevant to an organization. When you are applying this Planning Process in your own organization you will need to outline or define guiding principles that are relevant to your organizational setting, as these will establish the foundational context for the Planning Process.

While influences in any specific library environment or library chaos sphere may be different in form and content, there are many influencing factors that are common to library service delivery frameworks. In the Chaos Strategies Planning Process we begin by defining these influencing factors as guiding principles. The guiding principles used in the chaos sphere—Chaos Strategies Planning Process have been established from the transition, transformation factors and organizational needs common to most libraries. These include:

### ***Development of political will***

All strategic planning processes are subject to political influence, some of which are not in the best interests of the organization undergoing change. Unless the needs and goals are clearly articulated and a strong political will developed to support change at the outset, the desired new framework will be a kaleidoscope of political influence.

Therefore, the internal and external stakeholders must understand the impact of change at the outset and through the process, and they must support the process to manage it. The political stakeholders are in fact symbolic leaders who can support and foster effective change management. These symbolic leaders are both internal and external to the organization undergoing change.

### ***Service delivery aligned with strategic needs of the institution***

*Client Services:* Client services are linked to user needs. The focus of client services or user services will be specialized information research services where the librarian plays a key role on organizational committees and is an active research partner. As the electronic information services evolve, virtual users require information filtering to support informed decision-making.

### ***Complexity and change with new technologies***

*Evolving technologies:* New technologies increasingly play a major role influencing libraries and empowering user communities; learners, teachers and researchers, to be self-directed. It further enables the decentralization of information resources and services. It affects the nature and scope of information, in quality, quantity, integrity and security, format, storage, manipulation, and reproduction. It demands a more complex security network to insure integrity and protection of intellectual property and all aspects of the management of information.

*Online learning initiatives evolving:* Seamless access to information for student, teaching, resources and administrative staff is a requirement. As information access and online learning continue to evolve, learners will require access to both locally and globally distributed resources, in a variety of formats, such as print, online,

video, archival and other ephemera, ultimately all in a web-enabled environment.

Information/inquiry tools for retrieval and evaluation will be required and mediation of information will become paramount.

### ***Change in the way information is managed***

*Collection Management:* The librarian will continue to be responsible for collection development processes, and providing pathways to remote information as in collection management, which will evolve to become a form of information management. This will incorporate collection development and management with the provision of gateways to global information sources for local and virtual users.

### ***Effective management of budget and other resources***

*Management of budget and other resources including human resources:* Library budget and human resource administration will be aligned with institutional processes for development and review.

### ***Changing role of librarians and all library staff roles***

*Linkages:* The role of librarians and library staff will be research focused and involve research consultation, extensive liaison for collections and research and will be characterized as a “partner in the research process”. The librarian will liaise with partnering organizations and associations, including universities and colleges themselves, as well as educational associations, provincial, national, and international bodies to ensure the development of relevant and timely information services. Concurrently, librarians will need to be involved with library vendors to influence the development of timely and relevant library technologies and services. Librarians will

also be involved in research to extend the profession of library and information science.

*Professional development support needs:* librarians and library staff will require ongoing professional development in a variety of subjects related to information management, teaching and research methods, and organizational culture and management.

*Skills and expertise:* The skills and expertise on the part of all library staff will continue to include maintaining an awareness of information sources, technology, and user needs, which will include both local and virtual users. Specifically, greater knowledge and expertise will be required in evaluation methodologies, information seeking behavior, and the ability to develop a vision to develop information gateways to information sources and services to meet the diverse needs of and teachers, learners and researchers.

***Changing user needs and demands for teaching, learning and research***

*Information research needs:* The user community will evolve to become more diverse, encompassing users with accommodation and accessibility needs, requiring support and education as well as users who are highly skilled with defined needs, requiring more complex information research on diverse topics. Owing to the breadth and depth of information available and the range of users' skills and needs, educators and researchers will increasingly require analysis, synthesis and informed filtering of information to effectively support decision-making. They will need teaching skills founded in information literacy.

*Economic impact factors:* Libraries as institutions in school districts, colleges, and universities will continue to be funded by their parent institutions and governing bodies.

*Partnership:* Librarians will increasingly rely on building partnerships and consortia to manage costs, and also to develop comprehensive services related to the provision of access to information for current and future users.

*Grant Pursuit and Execution:* Grant funding will be an avenue for librarians to pursue in seek of support for library initiatives, although as adjunct to, not replacement for, base funding. As well librarians will need to be involved with library development and fund raising initiatives to foster long term philanthropic relationships that will benefit libraries.

*Legislation:* Libraries will continue to monitor and influence legislators on matters related to information access, rights and privacy. In the era of “fake news” and “revisionism” it is critical that libraries continue to steward knowledge, educate their diverse user communities and be a reliable source for access to timely, relevant, accurate and secure information for current and future users. The era of “Fake news” and “revisionism” are contributions to chaos. Libraries will continue to hold culture that is past, present and future in a myriad of forms. With increasing globalization vigilance will be required to protect and promote access to timely, relevant, accurate and secure information for current and future users.

### ***Globalization of standards, access, information sharing***

*Access to information:* Access to information will deal with recorded information and will include multimedia and ephemeral forms, including voice, data, image, and holographic images. Information will be seamlessly accessed and transferred from anywhere to anywhere. In our increasingly global world librarians will need to continue to be involved with the development of effective and relevant standards, as well as collaborative and consortia initiatives to enable information sharing and to maintain access and for both current and future users.

*Intellectual property issues:* Issues around intellectual property and use of the Internet, such as copyright are becoming increasingly prevalent as more web-enabled information sources are utilized and as our technologies become smarter. Librarians will need to be involved to provide effective services, including education about ethical use of information in a world where technology makes the transformation of information almost seamless. Librarians will need to promote practices so that their user community is respectful of the rights of copyright owners, and holders of intellectual property, while balancing the users' need for access to information.

*Other legal aspects, contracts, collective agreements:* As our society evolves, legal matters including contracts and collective agreements, will increasingly provide the framework within which the library and librarians operate. It is anticipated that these legal matters may provide transparency to enable, the profession and library service delivery.

*Education and political will of senior executives:* In many complex organizations senior executives often lose touch with the realities of providing operational services. The process of fostering executive political will or enlightenment is an important part

of the planning process. Enlightenment is linked to political will and in many organizations there is formal political will and there is informal internal “institutional” political will.

## **Developing the Chaos Strategic Planning Process**

The primary objective for creating a strategic planning process as a construct is to develop an operational organization within which resources are structured to successfully deliver required services to clients or user communities and which has the ability and flexibility to adapt to and manage change. Designing future or projected strategic frameworks can be considered as a six-phase process, with several internal steps in the phases. The following outlines the six phases of the Chaos Strategic Planning Process (CSPP):

1. Defining the end game - formulation of a strategic initiative(s) or goal(s).
2. Documenting the current environment - the inertial chaos sphere.
  - a. Determining the “strategic characteristics” of the current environment.  
Strategic characteristics include major components or divisions that are unique and integral to the current environment.
3. Documenting all factors which influence and impact the current environment, including a needs analysis - these are the transition/ transformation factors.
4. Analyzing the impact of the transition/transformation factors--influence factors - building knowledge outcomes
  - a. Begin by building choices or options based on phase 3.
5. Designing a new environment. This is the synthesis phase we call framing.
  - a. In the planning process this is referred to as framing the projected

chaos sphere.

6. Adjusting the new environment to meet operational needs, goals and realities.

This phase is referred to as “modulation”. It is the process of adding information as in intelligence to the final design of a projected chaos sphere.

- a. This step also includes establishing the “endgame” to begin a new cycle.

In its simplest form the Chaos Strategics Planning Process is analogous to taking a trip. At the outset you will need to know where you want to go or at least that you want to go somewhere, which is the “endgame”. Second, you will need to know where you are. Third, you need to consider what things may impact your trip. Fourth, you will need to consider how these things may impact your trip. Fifth, you must construct a scenario as to how the trip will unfold and how you are to get to where you are going. Finally, you will need to adjust your plan as you go, (i.e., how to deal with things that may interrupt the trip). The “endgame” of course is not eternal. Once reached it becomes the new initial or inertial “chaos sphere” and the planning cycle continues. It is also a soft target that needs to be modulated through time and should be viewed as a probable outcome. Planning is a process and the process enables us to learn and adapt or evolve plans as needed to deal with ambiguity. The concept of modulation is really about how to modify or adapt plans as new information or changing information needs to be accommodated in a plan. This is why the use of the term “probable” outcome makes sense in this planning process.

Since the sum total of this process is variable and dynamic it cannot be represented as a deterministic model but rather as a chaos model. As such we refer to the total environment within which everything operates as “chaos space” and the entities within it as “chaos spheres”. An overview illustration of the Process is presented in Figure 1. This is an updated graphical version for 2018 based on the original diagram that is included in Appendix A with explanatory notes (Figure 2).

### **Phase 1: Defining the end game**

In Phase 1 using the Chaos Strategies Planning Process, the process is to define the strategic end game. The end game is characterized as a future objective that adds value and improves the strategic advantage of the current environment. It can be a general statement such as we need to do something about the way in which we deliver services, or a specific objective such as we need to use new technologies to improve our service levels, or a complex set of strategic initiatives which may include a total reorganization precipitated by pressing political and economic impact factors. The end game defined at the outset may be somewhat soft in nature and may often not turn out to be the real end game at the end of the planning process. In simple terms things are not often black and white there is a lot of grey ambiguity that will emerge. As the planning process unfolds it will evolve based on new information learned or gained in the process. This speaks to the value of the process. Recall Shipengrover (1996) who reminds us that in planning we do not always know what we need until we are into the process. This is the intangible, the ambiguity and

the fun of planning.

As specified in the guiding principles when using the Chaos Strategies Planning Process, the first significant task will be to understand the internal politics as this key aspect of the organizational context will be needed to successfully address political will issues. Both an understanding of the issues in defining an end game and a commitment from the key stakeholders to resolve them will be a requirement for success. Real costs to carry a strategic initiative forward for example are often not clearly understood at the political level.

## **Phase 2: Documenting the current environment**

In Phase 2 using the CSPP, the process is to document the current environment to confirm and build shared understand across the organization. Managing change clearly means changing something. Often, many of the stakeholders do not have clear information or shared understanding about where they are now, at least in terms of their current organizational environment and what is involved in the CSPP as in any planning process. It is important to document the strategic characteristics of the current environment which we refer to as the inertial chaos sphere. Once the Strategic Characteristic (SC) are documented in the inertial chaos sphere this information will be valuable to inform the key stakeholders and assist them as they build shared understanding about their current environment.

## Strategic Characteristics (SC)

Chaos spheres are characterized by unique components or divisions. These components are identified as “Strategic Characteristics” for the purpose of strategic analysis and planning. A “Strategic Characteristic” can be defined as follows:

- It must be a key element in the makeup of the organization or division, for example, student enrolment, facilities, funding, collections.
- Changing an SC will change the nature of the chaos sphere; for example, a decrease in funding to a library may change its service delivery model.
- Strategic Characteristics can be categorized according to major divisions or components within an organization and this will depend on the organizational context. SCs are specific to an organization. In the example presented in the Chaos Strategies Planning Process, we identified the SCs as; political, financial, legal, structural and services. The SCs are coupled relationships influencing the complete culture of the organizational structure in terms of accountability and services. Each of these five major divisions or components will have further coupled or inter-related sub-divisions. The SCs will be determined based on each organization.
- An SC is not an “Operational Characteristic”; for example, the decision to provide services to support a centralized service desk for students is strategic; how the service is provided is operational; once the service is operational however that service delivery model becomes strategic as a structural characteristic.

The visual construct illustrated in (Figure 2) presents an overview of the strategic planning process designed in the Chaos Strategies Planning Process. Future libraries need to be successful and thereby need successful structures to deal with change.

## **Strategic characteristics of the current organizational environment**

### ***Political***

Political strategic characteristics include political will, governance and the organizational culture. These represent components which involve establishing the mission, vision and values all within the organizational culture. For example, the endgame—what does the organization want to achieve? What is the desired outcome?

It will be important to understand the political will for the vision as this will impact influence and decision making related to change management. The work of the other major divisions will inform the political division. To be successful in achieving the endgame the work of this division will encompass pitching new initiatives or changes to the larger organization and the internal organization and as well to external organizations and partners.

These new initiatives will need to be expressed in terms relevant to each division and be coupled with the directions of the greater organization. Influencing, funding, supporting and educating others to enact or accept changes will be the key to success in the work of this division.

### ***Financial***

The financial division includes accountability and documentation related to matters such as budget management, and budget control. The work of this division will be closely coupled with the legal division. It will involve detailed budget documentation for the current organization and the historical perspective. This division will frequently provide detailed information to support informed decision making related to each of the other major strategic divisions. For example, financial information related to organizational budget, human resources, technology, and services management will be managed by this division.

### ***Legal***

The legal division in our current litigious society plays a major role in the strategic development of any successful development and management of change and generally includes accountability, negotiation and documentation related to vendor contracts and employee contracts. Also, legislation can constrain what librarians can and cannot do. Typical legal responsibilities will include legal issues related to employee contracts in unionized environments, protection of intellectual property rights, licence contracts for the acquisition and maintenance of new technologies and services, software contracts for administrative and academic needs. The role and work of the legal division will be closely coupled with and determined by the structural and political divisions of the organization. In the legal division there will be local variations and this work will be closely coupled with the larger organizational structure. Ideally, legal matters will establish transparency for the organization and the service delivery model developed for its clients.

### ***Structural***

The structural division includes organizational accountability within organizational structures. For example, the organizational chart identifies the staffing complement, reporting relationships and hierarchy. Also included in the structural division is the relationship to other departments within the organization. It is the set of underlying working relationships related to the organization of the enterprise. Within structure each employee group will have defined job descriptions, and programs for performance management. These structural elements will be determined by the larger organization. Again there will be local variations. Some organizations will have organic loosely defined documents for job descriptions, and performance management. Others will be clearly defined and structured for specific roles within the organization. It is likely that organizations will have multiple employee groups and their documentation will be determined specifically for each employee group. Physical structure is a major component for the organization to be able to support and deliver its services.

### ***Services***

The services division includes accountability for all aspects of organization operations and delivery of its services to its user communities. In this division services are reviewed, developed and implemented based on user community needs balanced within the political, financial, legal and structural parameters of the organization. For example, the development and delivery of effective library services requires awareness of the organizational culture and an understanding of the interrelationships between each of the other four divisions. In this context library

services is in one of the five divisions and is impacted by the other four divisions within the library chaos sphere.

When defining and describing these five major divisions as outlined above, it is important to be cognizant of their inherent interrelationships and interdependencies which we define as coupling. The understanding of the coupling, together with the nature and scope of the strategic characteristics will provide an overview of the organization and how it works. The major task in the Chaos Strategics Planning Process will be to follow the six steps outlined in the Process. Once the endgame is defined and the current environment is documented and the subsequent steps are followed as outlined in the CSPP the challenge will be to build a detailed working framework for a library which we refer to as the “Inertial Chaos Sphere”.

Managing change requires a formalized approach for dealing with issues and creating realistic frameworks to deal with the change. Figure 1 illustrates the process for implementing the chaos sphere model. Complete documentation is required at each step in the process.

The initial planning cycle will prove to be the most complex since it will require a learning curve to make best use of the process. For each successive cycle, details from the previous cycle will allow for a more responsive and efficient planning process and should be less resource bound.

### **Phase 3: Documenting transition and transformation factors**

In Phase 3 the process will be to document the transition and/or transformation factors including intrinsic and extrinsic factors. Over time organizations are influenced by a variety of intrinsic and extrinsic factors which cause them to change. These factors are identified as Transition and/or Transformation Factors (TTFs). Intrinsic TTFs are those change agents arising from within the organization and may be the result of a needs analysis, funding constraints or aging technology. Extrinsic TTFs are change agents coming from outside of the organization and may result from political influence, government regulations or economic impact factors.

TTFs often act as catalysts to initiate change and are critical to developing a new strategic environment. The TTF factors can be referred to as action items in the process. Figure 1 presents an overview of the relationship between the inertial library chaos sphere and the TTFs.

The next three phases, Phase 4, Phase 5 and Phase 6, actually work together and are interconnected. They are somewhat sequential and not totally discreet phases.

Information and knowledge is shared back and forth in the course of developing and completing these 3 phases and this is how the cyclical process of the Chaos Strategic Planning Process is intended to work. Once the strategic planning cycle has been completed a new cycle can be initiated using the end game chaos sphere as the inertial chaos sphere for the next strategic planning cycle.

## **Phase 4: Analyzing the impact of the transformation factors**

In Phase 4 using the CSPP, the process involves analyzing the impact of the transition and/or transformation factors. Basically, the transition and/or transformation factors or action items are vetted, contextualized, completed and accepted for the projected new chaos sphere. They can alter or replace some of the strategic characteristics previously developed. Phase 4 involves building knowledge-based outcomes; that is meaning making choices or developing options based on the information and knowledge gained in phase 3. This process is analytical and sets the stage to inform thinking and begin considering how to prepare to begin framing a new projected chaos sphere in phase 5.

## **Phase 5: Framing and synthesizing to design the projected chaos sphere**

In Phase 5, working with the results of Phase 4, that is, reviewing the knowledge-based outcomes and choices or options that were created, the task is to synthesize all the information and begin to frame the projected chaos sphere. In fact in Phase 5 the projected chaos sphere can be considered a “beta version” as is anticipated that it will be modulated in Phase 6.

## **Phase 6: Modulation to the projected chaos sphere**

In Phase 6, the projected chaos sphere will be adjusted for the new environment to meet operational, needs, goals and realities. “Modulation” means adding knowledge and intelligence over time to create the new projected chaos sphere.; this can include “fine tuning” the “beta version” of the projected chaos sphere that was in development in phase 5. The projected chaos sphere can be considered complete once the modulation phase has ended and the projected chaos sphere can now be considered as a new “Inertial Chaos Sphere”. The cycle now continues, or begins again, with the establishment of a new endgame. Establishing a new endgame is the signal to begin a new cycle.

Figure 1 presents an illustrative overview of the six phases of the Chaos Strategic Planning Process. The Process will be continuous and cyclical and application of the Process as outlined can be applied to a variety of enterprise and departmental entities.

# Chaos Strategies Planning Process

## Six phases of the strategic planning cycle

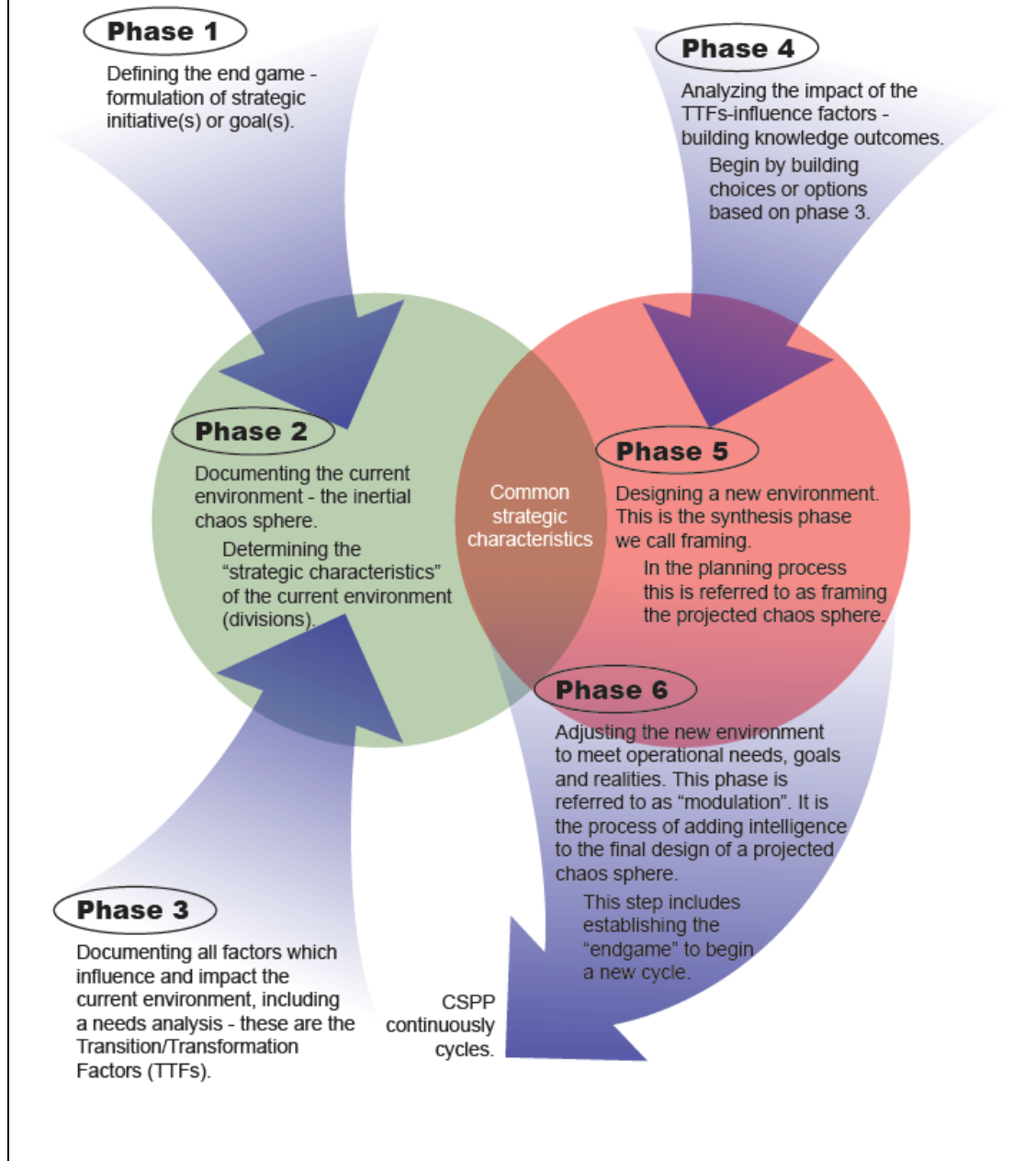


Figure 1. Chaos Strategies Planning Process 2018 (Wilkins)