



The Importance of Strategic Planning for Your Library

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This program is funded through a grant from the Institute of Museum and Library Services (IMLS)



coordinated by the Montana State Library



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STRATEGIC PLANNING

It's not *THAT* scary



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Planning Fears are Real

What are the challenges to planning?

Have you had negative experiences?

What has prevented your library from planning?



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It doesn't need to:

- Take a lot of time
- Cost a lot
- Make you crazy
- Produce few or no results

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What is Strategic Planning?

- ▶ A process
- ▶ A direction or future path
- ▶ A guide tool
- ▶ A measure of success

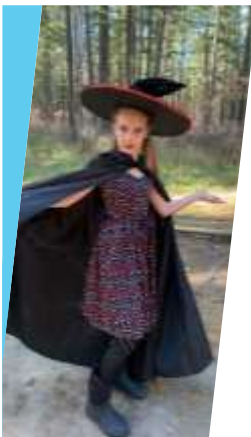


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What Makes a Plan STRATEGIC?



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What Results Should You Expect?

- ▶ A written document with clear goals
- ▶ Buy-in from constituents
- ▶ Clear strategies to implement
- ▶ Ways to measure your success
- ▶ Helping build a culture of planning



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Why plan? Is it time for you to plan?



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When is it time to plan? *(Other than always)*

-  Facing changes in your library, library service, your community, or the world
-  Needing to be more effective, grow, or increase resources
-  Getting everyone in the library on the same page
-  Providing long-term direction to staff/community



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Why is a Strategic Plan Important for a Public Library?

- ▶ Libraries, communities and the world are changing. Helps you navigate with purpose.
- ▶ Connects the Library to its constituents (not just current users)
- ▶ Sets a stated direction for whole organization



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Why is a Strategic Plan Important for a Public Library?

- ▶ Builds support from staff, patrons, funders, etc.
- ▶ Increases likelihood of targeted impact
- ▶ Allows for effective measurement of services. Are you doing the right things?



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The Planning Process is as **IMPORTANT** as the Final Plan!



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Keys to a Plan's Success

- ▶ People-focused
- ▶ Quick and engaging
- ▶ Action-oriented, moves to implementation
- ▶ Progress check-ins and accountability



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Missteps to Avoid

- ▶ Trying to do too much
- ▶ Vision/mission are unclear
- ▶ Goals aren't attainable
- ▶ No accountability
- ▶ Not supported by staff/users

LIBRARY STRATEGIES

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It is vital to create and foster a culture of planning.
People drive plans, not documents.

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Build a Culture of Planning

- Regular Board check-in and review (dashboard and annual review)
- Committed and on-going Library staff leadership for planning
- Start work or implementation plan at least annually
- Accountability - champions who are held to completing tasks on time
- Planning to plan again, iterative, never-ending process.

LIBRARY STRATEGIES

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What does a “culture of planning” look like?

- ▶ Embraced by leadership - board and director
- ▶ Formalized process
- ▶ Drives operations
- ▶ Is a regular, ongoing part of meetings
- ▶ Determines results you are striving to achieve
- ▶ Has accountability across organization
- ▶ Success is measured by the planning goals and stated outcomes



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Concerns? Questions?



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A good planning process looks at internal issues

- Budget
- Staffing
- Collections
- Technology
- Facilities



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External issues can be more challenging

Changes in library service

Users vs. non-user wants and needs

Community needs as a whole



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Good planning values the outsider's perspective



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Libraries can't serve everyone equally, but they can approach equitable service.

Free, open access isn't necessarily equitable.

You are making a choice. How do you decide who and what to prioritize?



LIBRARY STRATEGIES

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Important to look at the diversity of your community. What does diversity look like for you?

- ▶ Race and ethnicity
- ▶ Age – 0 to 100+
- ▶ Differing economic classes
- ▶ Different educational levels
- ▶ Gender: Men, women, LGBTQ
- ▶ Language
- ▶ Physical or learning challenges
- ▶ Religion
- ▶ More....



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Who does your library serve well? Not so well? Questions on diversity?



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Cookin' Up a Plan: Typical Steps

- 1. Review data at hand**
 - ▶ *Examples:* Usage stats, budgets, census data
- 2. Conduct research**
 - ▶ *Examples:* Benchmark to peers, industry trends, new service evaluations



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Cookin' Up a Plan - 2

3. Internal Stakeholder Input

- ▶ *Examples:* Staff survey, staff/Board retreat, Friends/foundation

4. External/Market Input

- ▶ *Examples:* Surveys, retreats, focus groups, listening sessions and community forums



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Cookin' Up a Plan - 3

5. Drafting/Approving the Plan

6. Work Plan and Implementation

- ▶ Who does what and when to achieve the goals?

7. Evaluation

- ▶ Regular plan check-ins to mark progress and outcomes



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Right-Size Your Process

- ▶ Your planning committee may be 3 or 15 depending on your size
- ▶ You may have enough data on hand, or you may need to spend time compiling it
- ▶ Research may be needed, or you can find it on-line, or from your state or regional library
- ▶ One staff/board session may suffice for internal input, or you might need multiple processes
- ▶ One forum for community input may be enough or you might need many, different processes in a larger setting
- ▶ The Director may be able to draft the plan, or you might need more people to be involved



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Elements of a Strategic Plan



MISSION - A statement describing the reason your organization exists. What you do + what/who you do this for.

VISION - A statement describing aspirational yet achievable long-term changes to be brought about by your organization's work

Both should be concise, in simple language, and used regularly.



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Elements of a Strategic Plan (Sometimes)



VALUES STATEMENT - It expresses an organization's motivations and the worldview under which it operates. It helps define the operational culture for staff, board, and community.



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Elements of a Strategic Plan



GOALS - What you want to accomplish. Changes in course or new directions to undertake. Focuses on overcoming challenges or taking an alternative path.

STRATEGIES - Major methods to achieve your goals.

(These are sometimes done in a SMART framework - specific, measurable, achievable, relevant, time-bound)



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Elements of
a Strategic
WORK Plan



- TACTICS/TASKS
- CHAMPION (WHO'S RESPONSIBLE)
- TIMELINE/DEADLINE
- RESOURCES NEEDED
- OUTCOME, MEASUREMENT, OR OUTPUT



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Thoughts
on Planning
Process or
Elements?



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LINK FOR HANDOUTS:



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In Your Handouts



- Presentation PowerPoint
- Possible Planning Processes for Different Sized Libraries
- Simple Planning Framework/Template
- Sample Community & Staff Surveys
- Sample Mission/Vision/Values Statements
- Suggested Community Retreat Participants
- National Trends one-pager
- Links to Sample Library Strategic Plans



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Final Questions?



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Thank You!

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and the Montana kids,
Olivia, J.J. and Roman,
and the kids of the
Saint Paul Public Library



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