



**Background Materials/Handout for:**

## **The Importance of Strategic Planning at Your Library**

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# A Simple Strategic Planning Framework

*Goals should focus on big picture, directional issues. The goals should be framed to look at your library's operations, but also community needs/desires and how your library can be better at serving those needs. In general, all goals should have defined outputs that are concrete or measurable, so that you can evaluate the success of your efforts.*

Some Potential Focus Areas:

- 1) Library facility
- 2) Library services: collection, programs, technology, children's or teen services, etc.
- 3) Community issues or needs to be addressed by the library (literacy, access to technology, workforce/economic development, etc.)
- 4) Leadership, staff development, succession
- 5) Public support/advocacy
- 6) Fundraising/Friends/Foundation
- 7) Community partnerships
- 8) Marketing and communications – raising awareness in the community
- 9) Diversity and inclusion
- 10) Board development

<b>Goal 1:</b>
<b>Goal 2:</b>
<b>Goal 3:</b>

## Example

**Goal:** Increase volunteers

**Time to complete goal:** 14 months

<b>Activities →</b> <b>Steps to Complete Activities →</b> <i>What actions are needed to complete our goal?</i>	<b>Outputs →</b> <i>What will our goal do? Who will it reach?</i>	<b>Measurement Tool →</b> <i>How and when will the output data be collected?</i>	<b>Outcomes →</b> <i>How will the successful completion of your goal impact your org., comm. and prog.?</i>
<b>Activity:</b> Improve volunteer recruitment process <b>Step 1:</b> Assess current recruitment strategy <b>Step 2:</b> Recreate volunteer job descriptions (for various positions) <b>Step 3:</b> Circulate and post job descriptions in strategic locations  <i>Point-person:</i> Dan <i>Expected Date of Completion:</i> 11/1/22 <i>Completed:</i> Y / N	<b>Output 1:</b> Increase in number of volunteers who serve the library	<b>Measure for Output 1:</b> Volunteer management database/system  <b>Timeframe:</b> Begin data collection on 11/1/22, and compile progress report monthly.	<b>Impact on Community:</b> Organization visibility and awareness Service opportunities for community members Community buy-in Intercultural communication  <b>Impact on Organization:</b> Consistency in programming Support for library patrons More service hours  <b>Impact on Library Patrons:</b> More opportunities for library programming Relationship building
<b>Activity:</b> Increase volunteer retention <b>Step 1:</b> Implement a volunteer appreciation system <b>Step 2:</b> Ensure proper volunteer placement in accordance with their interests and skills <b>Step 3:</b> Develop volunteer feedback and improvement process  <i>Point-person:</i> Emily <i>Expected Date of Completion:</i> 5/1/23 <i>Completed:</i> Y / N	<b>Output 2:</b> Increase in number of volunteer hours at the library	<b>Measure for Output 2:</b> Volunteer management database/system  <b>Timeframe:</b> Begin data collection on 11/1/22, and compile progress report monthly.	
<b>Activity:</b> Hire intern volunteer coordinator <b>Step 1:</b> Create intern job posting and circulate <b>Step 2:</b> Develop and complete hiring process <b>Step 3:</b> Orient and train intern  <i>Point-person:</i> Cathy <i>Expected Date of Completion:</i> 2/1/23 <i>Completed:</i> Y / N	<b>Output 3:</b> Improvement in volunteer satisfaction	<b>Measure for Output 3:</b> Volunteer survey  <b>Timeframe:</b> Begin survey collection when survey completed, at latest by 5/1/23.	

# Strategic Plan

**Goal 1:**  
**Time to complete goal:**

<b>Activities →</b> <b>Steps to Complete Activities →</b> <i>What actions are needed to complete our goal?</i>	<b>Outputs →</b> <i>What will our goal do? Who will it reach?</i>	<b>Measurement Tool →</b> <i>How and when will the output data be collected?</i>	<b>Outcomes →</b> <i>How will the successful completion of your goal impact your org., comm. and prog.?</i>
<b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>	<b>Output 1:</b>	<b>Measure for Output 1:</b> <b>Timeframe:</b>	<b>Impact on Community:</b>  <b>Impact on Organization:</b>  <b>Impact on Program Participants:</b>
	<b>Output 2:</b>	<b>Measure for Output 2:</b> <b>Timeframe:</b>	
	<b>Output 3:</b>	<b>Measure for Output 3:</b> <b>Timeframe:</b>	

**Goal 2:**

**Time to complete goal:**

<b>Activities →</b> <b>Steps to Complete Activities →</b> <i>What actions are needed to complete our goal?</i>	<b>Outputs →</b> <i>What will our goal do? Who will it reach?</i>	<b>Measurement Tool →</b> <i>How and when will the output data be collected?</i>	<b>Outcomes →</b> <i>How will the successful completion of your goal impact your org., comm. and prog.?</i>
<b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>	<b>Output 1:</b>	<b>Measure for Output 1:</b> <b>Timeframe:</b>	<b>Impact on Community:</b>  <b>Impact on Organization:</b>  <b>Impact on Program Participants:</b>
	<b>Output 2:</b>	<b>Measure for Output 2:</b> <b>Timeframe:</b>	
	<b>Output 3:</b>	<b>Measure for Output 3:</b> <b>Timeframe:</b>	

**Goal 3:**

**Time to complete goal:**

<b>Activities →</b> <b>Steps to Complete Activities →</b> <i>What actions are needed to complete our goal?</i>	<b>Outputs →</b> <i>What will our goal do? Who will it reach?</i>	<b>Measurement Tool →</b> <i>How and when will the output data be collected?</i>	<b>Outcomes →</b> <i>How will the successful completion of your goal impact your org., comm. and prog.?</i>
<b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>  <b>Activity:</b> <b>Step 1:</b> <b>Step 2:</b> <b>Step 3:</b> <i>Point-person:</i> <i>Expected Date of Completion:</i> <i>Completed: Y / N</i>	<b>Output 1:</b>	<b>Measure for Output 1:</b> <b>Timeframe:</b>	<b>Impact on Community:</b>  <b>Impact on Organization:</b>  <b>Impact on Program Participants:</b>
	<b>Output 2:</b>	<b>Measure for Output 2:</b> <b>Timeframe:</b>	
	<b>Output 3:</b>	<b>Measure for Output 3:</b> <b>Timeframe:</b>	

# Outlines of Possible Strategic Planning Processes for Different Sized Libraries

## **POSSIBLE PROCESS - Small Library, 1<sup>st</sup> Strategic Plan**

1. Director and 2-3 others meet to review Library and community stats/trends. Group lays out possible goals.
2. Ask staff (if not involved in the planning meeting) to share what they see as the big issues ahead for the library.
3. Get community input - talk to people as they visit, do a very simple survey in the Library, have an open community meeting where people can share how they'd like the Library to improve or change.
4. Director drafts strategic plan and gets planning group suggestions.
5. Board reviews and approves.
6. Director focuses annual work plans from strategic plan.
7. Regularly track strategic plan progress (board).

## **POSSIBLE PROCESS - Small Library, Expanding on Previous Planning**

1. Convene small committee for planning: Director, 2 Board members, Friends' representative, 2 community members.
2. Compile and review library and community stats/trends.
3. Meet with staff (if not all part of planning – led by board member).
4. Committee determines which groups are essential to get input from.
5. Get community input – short survey in library and community and hold 2-3 small group sessions (include some non-users) on library future.
6. Committee meets to review what you've seen & heard.
7. Director drafts strategic plan, committee reviews/edits.
8. Board approves strategic plan.
9. Director creates staff work plan.
10. Make strategic plan available to community.
11. Regularly track strategic plan (board) and work plan (director/staff).

## **POSSIBLE PROCESS - Larger Library, Planning Experienced**

1. Convene committee: Director, 2 Board, 1 Staff Member, Friends/Foundation, Funding Rep., 2 Community Members, Outside Facilitator (if using).
2. Review Library and community stats/trends.
3. Conduct staff survey and staff session (led by outside facilitator).

4. Conduct community survey – in library and broad community distribution.
5. Committee determines which groups are essential to get input from.
6. Conduct in-person community retreat, 4-5 focus groups, *or* open community forum (ideally led by outside facilitator – must include some non-users).
7. Gather committee to review what has been learned and outline major goal areas.
8. Facilitator or Director drafts strategic plan. Reviewed and edited by the committee.
9. Board approves strategic plan.
10. Director creates staff work plan.
11. Make strategic plan available and promote it to the community.
12. Regularly track strategic plan (board) and work plan (director/staff).





# SAMPLE LIBRARY MISSION, VISION & VALUES STATEMENTS

## Mission Statements (from Urban Library Council)

- Infinite possibilities for all to connect, share, succeed, thrive—ALAMEDA COUNTY LIBRARY (CA)
- Providing opportunities to explore, learn, create, and connect—BALTIMORE COUNTY PUBLIC LIBRARY (MD)
- To engage our community in literacy and learning—CARNEGIE LIBRARY OF PITTSBURGH (PA)
- We create a community of readers and empower individuals with free access to information and the universe of ideas.—CHARLOTTE MECKLENBURG LIBRARY (NC)
- We welcome and support all people in their enjoyment of reading and pursuit of lifelong learning. Working together we strive to provide equal access to information, ideas and knowledge through books, programs and other resources. We believe in the freedom to read, to learn, to discover.—CHICAGO PUBLIC LIBRARY (IL)
- We are the People’s University, the center of learning for a diverse and inclusive community.—CLEVELAND PUBLIC LIBRARY (OH)
- Advance literacy, guide learning and inspire curiosity.—FREE LIBRARY OF PHILADELPHIA (PA)
- Connecting people to the transforming power of knowledge.—GRAND RAPIDS PUBLIC LIBRARY (MI)
- We link people to the world.—HOUSTON PUBLIC LIBRARY (TX)
- We deliver high-quality public education for all ages.—HOWARD COUNTY LIBRARY SYSTEM (MD)
- To enrich lives, build community and foster success by bringing people, information and ideas together.—JACKSONVILLE PUBLIC LIBRARY (FL)
- Lexington Public Library connects people, inspires ideas, and transforms lives.—LEXINGTON PUBLIC LIBRARY (KY)
- Lincoln City Libraries fosters the power of reading and provides open access to all forms of information to enrich people's lives every day.—LINCOLN CITY LIBRARIES (NE)
- Madison Public Library provides free and equitable access to cultural and educational experiences. We celebrate ideas, promote creativity, connect people and enrich lives.—MADISON PUBLIC LIBRARY (WI)
- Transforming Lives, Enriching Neighborhoods, and Preserving History—NEW ORLEANS PUBLIC LIBRARY (LA)
- Omaha Public Library strengthens our communities by connecting people with ideas, information, and innovative services.—OMAHA PUBLIC LIBRARY (NE)
- Our Vision: Our Vision is an educated, connected community of readers, learners, doers, and dreamers. Our Mission: We transform lives by educating, inspiring, and connecting people. —PIMA COUNTY PUBLIC LIBRARY (AZ)
- Connecting you to the joy of reading and to information for lifelong learning—PIONEER LIBRARY SYSTEM (OK)
- Providence Public Library inspires lifelong education among all Rhode Islanders, fostering personal fulfillment and enhanced quality of life for an informed, enlightened and engaged citizenry.—PROVIDENCE PUBLIC LIBRARY (RI)

- To provide experiences that Inspire, Inform and Entertain.—RICHLAND LIBRARY (SC)
- We engage the community in lifelong learning through equal access to information, technology, gathering spaces, and expert staff.—ROCHESTER PUBLIC LIBRARY (NY)
- We connect the people in Saint Paul with the imperative and joy of learning through a lifetime.—SAINT PAUL PUBLIC LIBRARY (MN)
- The San Antonio Public Library changes lives through the transformative power of information, imagination and ideas.—SAN ANTONIO PUBLIC LIBRARY (TX)
- Scottsdale Public Library fosters lifelong learning by providing access to information, knowledge and ideas.—SCOTTSDALE PUBLIC LIBRARY (AZ)
- Building connections | Broadening horizons | Strengthening community The community source for literacy, technology and information—SPRINGFIELD CITY LIBRARY (MA)
- Inspiring Ideas, Enriching Lives, Creating Community—STARK COUNTY DISTRICT LIBRARY (OH)
- The Toledo Lucas County Public Library’s mission is to provide information, education, and technology to help the community live, learn, and grow.—TOLEDO LUCAS COUNTY PUBLIC LIBRARY (OH)
- Sparking curiosity and connecting our community through literacy and learning.—TOPEKA AND SHAWNEE COUNTY PUBLIC LIBRARY (KS)
- Libraries Change Lives.—TULSA CITY-COUNTY LIBRARY
- Transforming lives for a better community.—VIRGINIA BEACH PUBLIC LIBRARY (VA)

## Vision Statements

- We are a cornerstone of a thriving city: welcoming people of all ages and cultures; strengthening neighborhoods and learning networks; and inspiring all with the world of ideas.
- Create extraordinary learning environments and experiences.
- The Library is recognized as a leading community institution improving literacy, the exchange of ideas, workforce development, and social engagement.
- The Library strives to add value in our customers’ lives by:
  - partnering with them to develop skills they need to succeed in all stages of their lives;
  - helping local businesses and community agencies thrive;
  - inspiring understanding by creating occasions for the exchange of ideas, cultural experiences, and discovery; and
  - offering opportunities for gathering, learning, contemplating, creating, and finding inspiration.
  - We envision a community where library services ensure that every person has the opportunity and resources to read, graduate, engage, work and learn.
  - Connecting our community to the world of ideas where learning never ends.
  - Your place to learn, share, and create.
  - Where aspirations, ideas and knowledge converge.
- The Library serves the community with increasingly vibrant opportunities in cultural enrichment, community engagement, and education, to advance the well-being and prosperity of all its citizens.
- The library plays a primary role in cultivating a literate and economically strong County, enhancing the quality of life for everyone in the community.

## Vision Statements

- Our Values:
  - Access.
  - Service.
  - Life-long learning.
  - Intellectual and academic freedom.
  - Collaboration.
  - Mutual respect and civility.
  - Responsible stewardship.
- The Library provides excellent service to residents based on the following values:
  - **Customer Service** – We welcome everyone and treat them with openness and respect.
  - **Community Service and Partnerships** – We provide indispensable resources and services to meet community needs. We partner with other organizations to maximize our local resources.
  - **Creativity and Innovation** – We support creativity and innovation to better serve the community. We use technology to increase access to information and to work more efficiently.
  - **Access and Inclusion** – We work to ensure equal access for all. We build, foster, and maintain an environment that is inclusive.
  - **Intellectual Freedom** – We provide information representing all points of view. We recognize each individual's right to access information and respect the privacy of library patrons.
  - **Stewardship** – We are good stewards of the public's resources and look to provide both effective and efficient services to the community.
- Our Values:
  - We offer superior customer service
  - We believe in the freedom to know
  - We respect diverse perspectives and provide access to all
  - We cultivate collaboration and innovation
  - We provide an open and respectful workplace
  - We are wise stewards of public resources
- Together, we abide by the following values:
  - **Investing in All Generations** - We grow the success of our residents, and the populace as a whole.
  - **Creating a Friendly and Welcoming Environment** - We welcome everyone to the Library.
  - **Connecting Our Community** - We connect our residents, and foster meaningful community relationships.
  - **Providing Access for All** – We are a gateway to the services and resources needed by all members of our community.



## AN OVERVIEW OF NATIONAL TRENDS IN PUBLIC LIBRARIES

*by Melissa J. Brechon, Lead Consultant, Library Strategies Consulting Group*

**MAKERSPACES/DIGITAL MEDIA LABS** – Libraries are installing spaces, including technology, where people can gather to create invent and learn, rather than just consume information.

**TECHNOLOGY** - Digital transformation is happening at a steady rate with changing innovations moving the library toward digitization of collections, increasingly diverse types of technology accessible at the library, and technological advances making library work more efficient.

**COLLECTION SPACES** - Print collections are being reduced at an annual rate of 5-10% yearly making room for alternative collections, additional seating and/or collaborative work space areas.

**E-BOOK COLLECTIONS** - A greater share of the collection budget is going toward the cost of e-books and other e-materials to fill demands.

**ACCESS LOCATIONS** - Libraries are adding kiosks or “Redbox” style lending machines where people can check out and return popular books or movies without having to go to the library itself. Remote access is more critical than ever.

**COMMUNITY SPACES** - The library is taking on a role as a model for lifelong learning and creating public spaces which host a variety of discussion groups, lecture series, hosting civic-engagement processes, technology and virtual learning opportunities.

**PARTNERSHIPS** - Libraries are developing partnerships with organizations that have not been natural partners in the past, which is affecting service, delivery and even building/location decisions.

**PUBLIC/PRIVATE FUNDING MODELS** - Libraries are now being built or renovated with a combination of public/private funding streams, and libraries are seeking more annual support from their support groups.

**DEMOGRAPHIC CHANGES** – Populations are growing in ethnic diversity and age, with library programming services being directed to this change in all areas.

**CHANGING PATRON BEHAVIOR** – Book circulation is going flat as consumers are less impressed with information resources in print and rely on electronic and Google results.

**STAFFING CHANGES AND CHANGES IN HOW STAFF WORK** - Librarians are becoming digital mentors with new job titles and job descriptions matching the needed changes in social media, content delivery and community outreach.





## Sample Community Survey

### \_\_\_\_\_ Public Library Survey

Please help develop the Strategic Plan for the \_\_\_\_\_ Public Library by participating in this survey. In order to better serve Library patrons and \_\_\_\_\_ residents, your input on a variety of Library topics is needed. Your responses will help greatly in planning the future of the Library.

The survey takes 10 to 15 minutes to complete on average. Thank you for taking the time to assist your Library!

#### ***Library Use***

##### **1. When you visit the Library do you regularly (please mark all that apply):**

- Check out books
- Check out DVDs
- Check out music CDs
- Read magazines or newspapers
- Use computers
- Access the Internet
- Download books or music
- Read or study
- Come for a meeting
- Come to browse
- Get help answering a question
- Use business or employment materials
- Attend children's programs or events
- Attend adult programs
- Other (please specify)

##### **2. If you do not use the \_\_\_\_\_ Public Library regularly, why not? (please skip this question if you regularly use the Library)**

- I don't need to use it
- I find what I need on-line
- Library hours are not convenient
- I use another library
- I prefer to buy my own books/magazines
- The Library doesn't have the materials I need
- Library staff are not helpful
- I am physically unable
- Don't have a library card

**3. Please check whether or not you are satisfied with the following aspects of library services: (Mark Satisfied, Not Satisfied, or Don't Use/Don't Know for each item)**

- Book Collection
- DVDs and CDs
- Magazines and
- Newspapers
- Downloadable eBooks &
- e-Audio Books
- Large Print Materials
- Children's Programs
- Teen Programs
- Adult Programs
- Meeting Rooms
- Reading Areas
- Computer Access
- Internet Access
- Staff Assistance
- Library Website
- Open Hours

Please share any additional comments on your satisfaction with the above services or others aspects of the library:

**4. Please indicate which of the following current library services are important to you or your family now (check all that are important to you now):**

- Book Collection
- Magazines and Newspapers
- DVDs and CDs
- Downloadable eBooks & e-Audio Books
- Large Print Materials
- Children's Programs
- Teen Programs
- Adult Programs
- Meeting Rooms
- Reading Areas
- Computers and Related Technology

Please share any additional comments on the importance of the above services, or other aspects of the library, for you or your family:

**5. Please indicate which of the following services you expect to be important to you or your family in five years (check all that you expect to be important in the future):**

- Book Collection
- Magazines and Newspapers
- DVDs and CDs
- Downloadable eBooks & e-Audio Books
- Downloadable Music & Films
- Large Print Materials

- Children's Programs
- Teen Programs
- Adult Programs
- Homework Help
- Meeting Rooms
- Reading Areas
- Computers and Related Technology

Please share any additional comments on the importance of the above services, or other aspects of the library, for you or your family in the future:

**6. How could your satisfaction with library services be increased?**

**7. What computer technologies or training would you like to see available at the library?**

**8. What programs, activities, or library services do you think should be provided that are not currently offered?**

### ***Demographics***

We would like to learn something about you. Providing the information below is optional. All information will be kept strictly confidential. Your response to these final questions will help the Library understand the results we received and the differing needs of our community members.

**9. Do you have a current \_\_\_\_\_ Public Library card? (Yes or No)**

**10. Do you have a library card from another library in the area? (Yes or No)**

If yes, which library?

**11. How often do you usually visit the library?**

- Weekly or more often
- About once a month
- 2-4 times a year
- Rarely
- Never

**12. Are you a resident of \_\_\_\_\_? (Yes or No)**

**13. What is your gender? (Male, Female, Other)**

**14. What is your age group?**

- 19 or under
- 20 - 29
- 40 - 49
- 50 - 59
- 60 – 69
- 70 or over



**15. How many children age 17 or younger live in your household?**

- None
- 1
- 2
- 3
- 4 or more

**16. How many preschool age (5 or under) children live in your home?**

- 0
- 1
- 2
- 3
- 4 or more

**17. What is the highest level of education you have completed?**

- Some high school
- High school graduate
- Vocational/technical school
- Some college
- College graduate
- Graduate/professional degree
- Other (please specify)

**18. How would you describe yourself? (Check all that apply)**

- Full-time student
- Part-time student
- Employed full-time
- Employed part-time
- Self-employed
- Retired
- Unemployed or looking for work
- Homemaker
- Parent
- Grandparent

**19. Please feel free to add any additional comments that you feel would help us plan for the future of the Library:**

Thank you for taking the time to complete this survey. Your perspectives are important to us, and we greatly appreciate your responses and comments. Survey results are one important component that will help create the strategic plan for library services over the next 3 to 5 years.

***Thanks again!***



**LIBRARY STRATEGIES** **Sample Staff Survey**

***Introduction***

Please take a few minutes to complete the following \_\_\_\_\_ Public Library staff survey. As you are probably already aware, the Library is engaging in strategic planning. Your involvement in and input into that process is critical, and the survey is one way to ensure that your voice is heard.

Please complete the survey no later than \_\_\_\_\_. Thank you for your time and input!

***Overview and Library***

1. If you could change 3 things about the Library, what would they be?
2. What is your vision for the Library five years from now? How should the Library be different?
3. How could the Library change or improve to better serve patrons?

***Changes in the Next 3 to 5 Years***

4. In the next 3 to 5 years, how should the Library collections and on-line resources change?
5. In the next 3 to 5 years, how should the Library's computer and technology resources change for the public? For staff?
6. In the next 3 to 5 years, how should the Library's programs and outreach efforts change?

***What Should be Added or Eliminated in Library Services?***

7. What new offerings (programs/services/collections) should the Library implement or explore?
8. What current offerings (programs/services/collections) could or should the Library reduce or eliminate?

***Library Staffing and Administration***

9. Do you receive adequate training and professional development to do your job well? If not, what kind of training do you need, or would like to see offered for staff?

10. Are there specific changes regarding Library staffing or administration that you would like to see occur?
11. Are there any internal issues (staff, administration, board, funding, etc.) hindering the Library from serving the community more fully? If so, please share your comments.

***Final Comments***

12. Please add any additional comments on issues or directions you believe the Library should address:

Thank you for completing the survey, and your help with the planning process. Once again, your comments are confidential. Only total, aggregate responses will be reported to the board and library administration. If you have any questions regarding the survey or the planning process, or if you would prefer to convey any confidential or sensitive issues directly to the consultants, please feel free to contact \_\_\_\_\_, principal consultant, at \_\_\_\_\_.

***Thank You!***



## TYPICAL PARTICIPANTS/INVITEES TO A COMMUNITY RETREAT

The desired mix of individuals includes:

- Lead library staff/staff representatives
- Library trustees
- Municipal/County, or other, public officials
- Library Friends/Foundation leaders
- Local school leaders and one or two teachers
- Homeschoolers (if significant library users)
- Business leaders – from varied businesses or Chamber of Commerce
- Representatives from other cultural or arts organizations
- Representatives from social service agencies
- Other governmental department heads, such as police or parks & recreation
- Religious leaders
- Representatives from key civic groups, such as Rotary or Kiwanis
- Local philanthropic community, such as a community foundation
- Union/labor representatives
- Representatives from nearby colleges or universities
- Representatives from nearby military bases – if in the area
- Representatives from nearby tribal nations – if in the area
- Representatives from critical demographics important in the community and to the library (it is likely that there is overlap from above in many cases):
  - people from diverse racial/ethnic groups across the community
  - seniors
  - parents with small children
  - teenagers
  - 20- and 30- somethings
  - LGBTQ community
  - Disabled community
  - Geographic spread across the community

A typical retreat involves around 40-60 attendees. We recommend the invitation start from a list of at least *twice* as many candidates as will attend (80-120 invitees).

## **Links to Good Sample Strategic Plans for Public Libraries**

***A variety of community sizes, types of libraries, and locations***

- [Auburn Public Library](#), Alabama
- [Bellingham Public Library](#), Washington
- [Bozeman Public Library](#), Montana
- [Forbes Library](#), Northampton (MA) public library
- [Fort Worth Public Library](#), Texas
- [Gwinnett County Public Library](#), Georgia
- [Imaginelf Library](#), Kalispell, Montana
- [Jefferson County Library Cooperative](#), Alabama
- [Lewis and Clark Library](#), Helena, Montana
- [Loudoun County Library](#), Virginia
- [Meridian Library District](#), Idaho
- [Palm Beach County Library](#), Florida
- [Prince George's County Memorial Library System](#), Maryland
- [Saugus Public Library](#), Massachusetts
- [Scarsdale Public Library](#), New York
- [Spring Lake District Library](#), Michigan
- [Waverly Public Library](#), Iowa
-