

Handout Packet for

**“A GOAL WITHOUT A PLAN
IS JUST A WISH”:
Setting a Course for Your Library’s Future**

A workshop facilitated by Stu Wilson

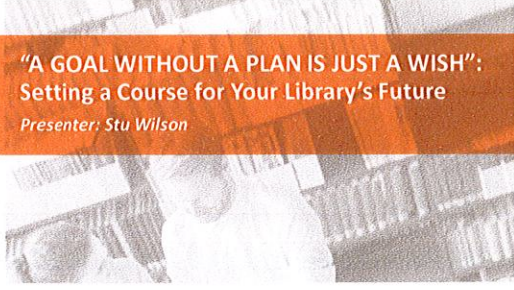
Butte, Montana – April 24, 2019, 9 a.m. to 4 p.m.

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LIBRARY STRATEGIES

**"A GOAL WITHOUT A PLAN IS JUST A WISH":
Setting a Course for Your Library's Future**
Presenter: Stu Wilson






Why Plan?

What is Planning?

- A direction or course for the future
- A process (often with many people or inputs)
- A tool to guide complex organizations through change or to advance
- A way measure of progress



Yum! Roman Makes Library Pizza

Why is Roman making pizza in the library?

What steps did the Library need to take to have Roman making pizza?



What are the outcomes of Roman making pizza?

Did the library achieve its goal?

When is it time to plan?

- Facing changes in organization, "industry," service area, or community
- Need to be more effective, grow, or use resources more efficiently
- To get everyone in the organization on the same page
- To provide long-term direction to staff

Different Types of Plans Meet Different Needs

Common plans in libraries:

- Strategic (Long-range)
- Technology
- Facilities
- Staffing
- Development or Fundraising
- Master




The Planning Process
is as
IMPORTANT
as the Final Plan!

**Cookin' Up a Plan:
Typical Processes or Steps**


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





Cookin' Up a Plan 2

- 3. Internal Stakeholder Input**
 - *Examples:* Staff survey, SWOC analysis, Board retreat
- 4. External/Market Input**
 - *Examples:* Community surveys, retreats focus groups, and listening sessions,




Cookin' Up a Plan

- 5. Drafting and Approving the Plan**
 - Usually a committee or board process
- 6. Creating an Action Plan**
 - A workplan or other processes to ensure implementation
- 7. Ongoing Evaluation**
 - Regular plan check-ins to mark progress and outcomes



STRATEGIC PLANNING

It's not THAT scary



STRATEGIC PLANNING

A way to successfully navigate the rapidly changing world of libraries and communities

**What Makes a Plan Strategic?
Why is it Unique?**

- Looks at BIG picture, directional issues
- Comprehensive
- Board and administration focus

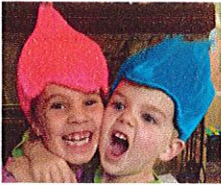
Why is a Strategic Plan Important for a Public Library?

- Communities are changing – and libraries even more. Helps navigate with purpose.
- Connects the Library to its constituents
- Sets a stated direction for whole organization

Why is a Strategic Plan Important for a Public Library?

- Connects the course set by leadership to staff and patrons – builds understanding & buy-in
- Allows for effective measurement of services and impact. Are you doing the right things?

2 Major Types of Strategic Plans for Public Libraries



1. Service, internal focus/approach
2. Community, external focus/approach

Keys to a Plan's Success

1. Involves process, stakeholders, and gets buy-in from staff and users
2. Quick and Fun
3. Action-oriented/implementation



4. Regular check-in on progress – it's alive!!!

Who Manages/Approves a Strategic Plan?



Process often managed by a group or committee of key stakeholders – “Planning Committee”

Approved w/implementation overseen (at high level) by the Board. Administered by lead staff.

The Rapid Results Process

PHASE 1: Pre-Planning and the Planning Team
Planning Team: Library Director, 2-3 Board members, Friends/Fdn. Representatives, 1-2 other lead staff, other local officials, 1-2 community folks

PHASE 2: Data Gathering

- *Library Data and Trends (always)*
- *Demographic Data and Trends (always)*
- *Benchmarking with Other Libraries (sometimes)*
- *Qualitative Assessment of the Library (always)*
- *SWOT or SWOC Analysis (sometimes)*
- *Community Surveys (90% of the time)*
- *Staff Surveys (sometimes – more often in large libraries)*
- *Focus Groups (rarely)*
- *Key Stakeholder Interviews (sometimes)*

PHASE 3: The Rapid Results Planning Retreat

The Rapid Results Process

PHASE 3: The Community Retreat

- *Critical to get a cross-section of the community – planning committee/library's biggest task*
- *Day-long with 40 to 60 participants*
- *Agenda*
 - *Library Director Presentation*
 - *Data Gathering*
 - *Discussion of Future Trends*
 - *Visioning/Goals Session*
 - *Small Group Strategy Sessions*

The Rapid Results Process

PHASE 4: Creating the Strategic Plan

- *Drafting the Plan: Mission, Vision, Goals & Strategies*
- *Finalizing and Approving the Strategic Plan*
- *Designed, simple short Strategic Plan – for the public*
- *Creating and Using a Board Dashboard*

PHASE 5: The Implementation Plan

- *Facilitating and Drafting the Implementation Plan – Staff*
- *Moving to action*

CONCLUDING THE RRP PROCESS

- *Thank yous, and Follow-up w/individuals and organizations*
- *Community Awareness and Marketing the Plan*



**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 the clear and inspirational long-term desired change resulting from your organization's work (but achievable)

Both should be concise, in simple language, and useful.



**Elements
of a
Strategic
Plan
(Sometimes)**

VALUES STATEMENT – It expresses an organizations motivations and the worldview under which it operates. It helps define the operational culture for staff, board, and community. More typical in larger libraries.


NICHE STATEMENT – Not usually seen for libraries. Defines how you are different from your competitors.



**Elements
of a
Strategic
Plan**

GOALS – What you want to accomplish. Changes in course or new directions to undertake. Focus on overcoming challenges or taking different path.

STRATEGIES – Major methods to achieve your goals.



Elements of a Strategic Work Plan

TACTICS/TASKS

CHAMPION (WHO'S RESPONSIBLE)

TIMELINE/DEADLINE

RESOURCES NEEDED

OUTCOME, MEASUREMENT, OR OUTPUT

Strategic Planning Costs & Schedule

- Ideal timeframe for planning: 3-4 months, no more than 6
- Usually 3-5 year plan
- Costs – just board and staff time for small libraries, up to \$20K+ for comprehensive facilitated process



A Culture of Planning

- Regular Board check-in and review (dashboard and annual more extensive review)
- Committed Library staff leadership
- Staff use of work or implementation plan, updated at least annually
- Accountability – champions who are held to accomplishing tasks
- Planning to plan again. Iterative process.

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 do 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 most significantly?

7. What computer technologies or training would you like to see offered or more 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 or Female)

14. What is your age group?

- under 20
- 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!

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!

Example List of Library Trends and Changes Nationally

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 additional seating and collaborative work space areas.

E-BOOK COLLECTIONS - A greater share of the collection budget is going toward the cost of e-books to fill demands. (Expenditures on e-resources rose by 66% from 2003 to 2009)

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.

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.

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
- 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 some duplication from above community members):
 - seniors
 - parents with small children (very good to have attend)
 - teenagers (Youth Council, etc.)
 - 20- and 30- somethings
 - people from diverse racial/ethnic groups across the community
 - LGBTQ community
 - Disabled community

A typical retreat involves around 40 attendees. We recommend the invitation start from a list of at least *twice* as many candidates as will attend (80-100 invitees). Selected individuals should be invited based on the above listed, and should be sent a formal invitation letter, followed by a personal appeal if they've not responded. The Library should provide a suitable venue for the retreat and makes provisions for lunch/snacks during the session.

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)

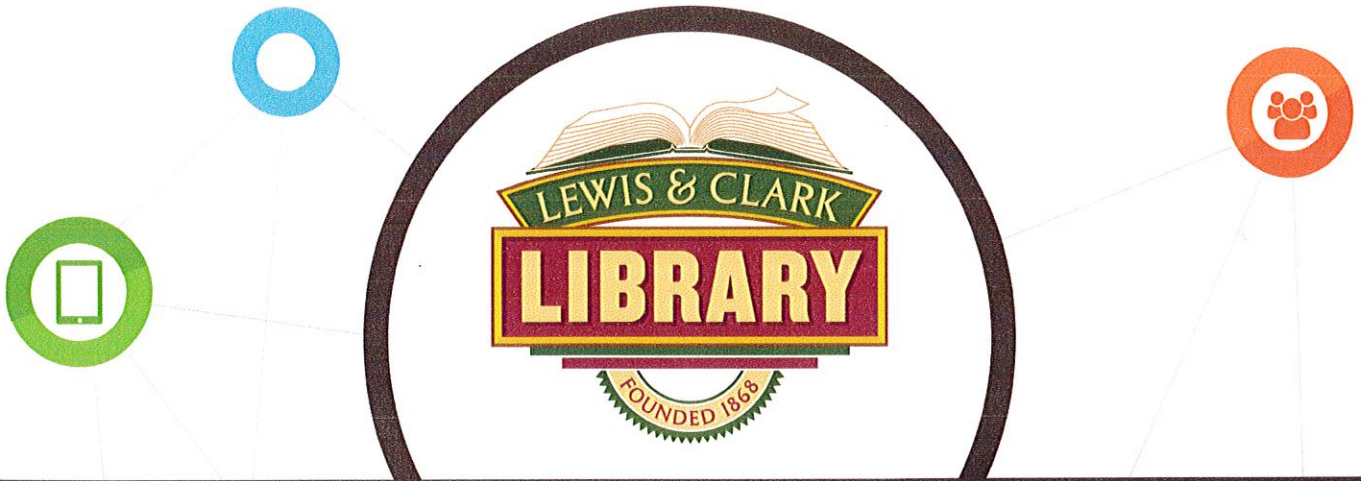
- To provide experiences that Inspire, Inform and Entertain.—RICHLAND LIBRARY (SC)
- We engage the community in lifelong learning through equal access to information, technology, gathering spaces, and expert staff.—ROCHESTER PUBLIC LIBRARY (NY)
- We connect the people in Saint Paul with the imperative 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.



STRATEGIC PLAN 2018 - 2022



GOALS and STRATEGIES

MISSION

The mission of the Lewis & Clark Library is to provide the best possible services and materials for informational, educational, cultural, or recreational use by the community.

VISION

The Lewis & Clark Library fosters the spirit of exploration, the joy of reading, and the pursuit of knowledge for our community.

GUIDING PRINCIPLES

Public Trust · Accessibility and Openness · Diversity · Quality of Services
Outreach and Partnership · Knowledge and Learning · Intellectual Freedom
Love of Reading · Information and Literacy · Creativity and Innovation

GOAL 1: LIBRARY FACILITIES

Improve Library facilities to better serve the community

STRATEGIES:

1. Continue with/implement ongoing plans for a redesign of the Main branch.
2. Implement a planning process for the development of a new, full-service branch library in the Helena Valley
3. Explore alternatives for improvements to the East Helena branch for better service and to ameliorate existing facilities issues
4. Regularly review safety issues affecting patrons or staff, and formulate appropriate training or procedures to address concerns

GOAL 2: ENHANCE SERVICES

Broaden programming and collections to enhance existing services

STRATEGIES:

1. Expand programming and services for children and teens
2. Explore off-site, transportation and outreach options for expanded teen service
3. Continue the current depth and types of adult programming and partnerships, with an increased focus on defining and attracting new, targeted audiences
4. Hone collections development to maximize patron satisfaction
5. Maintain the library's leadership role in providing technology and digital resources that address community needs

GOAL 3: UNDERSERVED POPULATIONS

Expand resources and partnerships to further address the needs of underserved and changing populations

STRATEGIES:

1. Examine current early literacy programs and resources at the library, to consider additional advances in community programs, particularly through partnerships
2. Identify the needs of under-resourced demographics, and create a plan to effectively provide library resources to these populations
3. Working with partners, undertake an improved service model for homeless and transient patrons
4. Investigate options for a flexible, mobile van service to better service targeted populations
5. Investigate innovative service delivery systems that may address digital access issues throughout the County

GOAL 4: MARKETING & PUBLIC AWARENESS

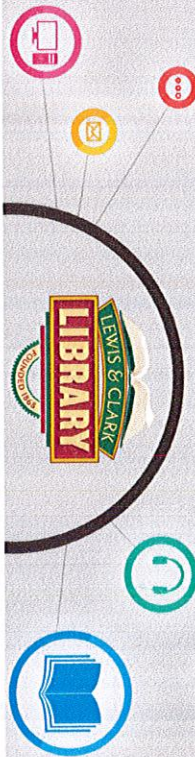
Advance marketing and public awareness of the Library

STRATEGIES:

1. Create a public relations/marketing plan, especially to reach non-users
2. Raise awareness of the Library through community networks
3. Increase marketing resources to allow for expanded public relations
4. Foster new communications approaches to ensure necessary messages, information, and policy changes reach staff at all levels and branches

2018-2022

ACTION PLAN



Goals & Strategies

Progress

Comments

GOAL 1: LIBRARY FACILITIES

Improve Library facilities to better serve the community

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2. Implement a planning process for the development of a new, full-service branch library in the Helena Valley
3. Explore alternatives for improvements to the East Helena branch for better service and to ameliorate existing facilities issues
4. Regularly review safety issues affecting patrons or staff, and formulate appropriate training or procedures to address concerns

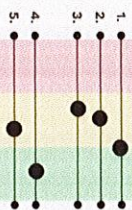


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GOAL 2: ENHANCE SERVICES

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Enter comments here about the progress of this strategy

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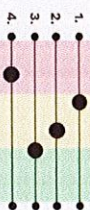


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GOAL 4: MARKETING & PUBLIC AWARENESS

Advance marketing and public awareness of the Library

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Enter comments here about the progress of this strategy

OFF TRACK MAJOR ISSUES	ON TRACK SOME ISSUES	ON TRACK NO ISSUES
1. ●	2. ●	3. ●
4. ●	5. ●	6. ●

A Simple Strategic Planning Framework

Goals should focus on big picture, directional issues. The goals should be framed to be looking 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

Goal 1:	
Goal 2:	
Goal 3:	

Example

Goal: Increase volunteers
Time to complete goal: 14 months

Activities → <i>What actions are needed to complete our goal?</i>	Outputs → <i>What will our goal do? Who will it reach?</i>	Measurement Tool → <i>How and when will the output data be collected?</i>	Outcomes <i>How will the successful completion of your goal impact your org., comm. and prog.?</i>
Activity: Improve volunteer recruitment process Step 1: Assess current recruitment strategy Step 2: Recreate volunteer job descriptions (for various positions) Step 3: Circulate and post job descriptions in strategic locations <i>Point-person:</i> Dan <i>Expected Date of Completion:</i> 11/1/13 <i>Completed:</i> Y / N	Output 1: Increase in number of volunteers who serve the library Output 2: Increase in number of volunteer hours at the library	Measure for Output 1: Volunteer management database/system Timeframe: Begin data collection on 11/1/13, and compile progress report monthly. Measure for Output 2: Volunteer management database/system Timeframe: Begin data collection on 11/1/13, and compile progress report monthly.	Impact on Community: Organization visibility and awareness Service opportunities for community members Community buy-in Intercultural communication
Activity: Increase volunteer retention Step 1: Implement a volunteer appreciation system Step 2: Ensure proper volunteer placement in accordance with their interests and skills Step 3: Develop volunteer feedback and improvement process <i>Point-person:</i> Emily <i>Expected Date of Completion:</i> 5/1/14 <i>Completed:</i> Y / N	Output 3: Improvement in volunteer satisfaction	Measure for Output 3: Volunteer survey Timeframe: Begin survey collection when survey completed, at latest by 5/1/14.	Impact on Library Patrons: More opportunities for library programming Relationship building
Activity: Hire intern volunteer coordinator Step 1: Create intern job posting and circulate Step 2: Develop and complete hiring process Step 3: Orient and train intern <i>Point-person:</i> Cathy <i>Expected Date of Completion:</i> 2/1/14 <i>Completed:</i> Y / N			

Strategic Plan

Goal 1:
Time to complete goal:

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

Goal 2:
Time to complete goal:

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

Goal 3:

Time to complete goal:

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