Why Plan
Plan to Plan
Five Step Planning Process
Final Plan
Planning Thoughts/Tips
Why?
Long Range Planning vs. Strategic Planning
Long Range Planning prepares for the future.

Strategic Planning based on the premise that change is necessary to survive and thrive in the future.
Plan to Plan
PLANNING TEAM
Planning Timeline

1 | Planning Details:
   ● Project goal, Start and End Date

2 | Activities
   ● Focus Groups, Surveys, Interviews, etc.

3 | Planning Committee
   ● Members, Meetings, Responsibilities

4 | Timeline

   Week One
   ■ Action Item One
   ■ Action Item

   Week Two
   ■ Action Item One
   ■ Action Item
Five Step Planning Process
Develop a Board Vision
Library Values Exercise

Identify three values that are the leading drivers of your library

1. Democracy
2. Equity of Access
3. Intellectual Freedom
4. Literacy and Learning
5. Logic
6. Privacy
7. Service
8. Stewardship
WHAT DO WE DO RIGHT NOW THAT ALIGNS WITH THESE VALUES?
WHERE ARE WE NOT AlIGNED WITH THESE VALUES?
HOW CAN WE STAY ALIGNED WITH THESE VALUES AS WE GROW OVER THE NEXT 10 YEARS?
WHAT WILL SUCCESS LOOK LIKE IF WE ACCOMPLISH THOSE THINGS?
Vision Statement Tips

- Start with the library’s values.
- Project 5 to 10 years in the future.
- Dream big and focus on success.
- Use the present tense.
- Use clear, concise language.
- Paint a graphic mental picture of the library you want.
- Have a plan to communicate your vision statement to your employees.
- Be prepared to commit time and resources to the vision you establish.

Reflect on the most significant events that have impacted the library.
Assessment
### Areas of Assessment

Evaluate how and when the library is being used.

<table>
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<tr>
<th>Internal</th>
<th>External</th>
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<tr>
<td>- Circulation Statistics</td>
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<td>- Programming</td>
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<td>- Trendspotting</td>
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<td>- Town Master Plans</td>
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<td>- School Board Master Plans</td>
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<td>- Other Community Organizations</td>
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The New York State Library provides a compilation of financial and service statistics through its website. Here you can find recent and historical data for all public libraries in the nation.
Gather Community Input
SURVEYS
Survey Question Tips

- Be Clear
- Opinions
- Keep Bias in Check
- Consider Every Option
- Open vs. Closed
- Test
FOCUS GROUPS
WHO SHOULD FACILITATE YOUR FOCUS GROUPS?
WHO SHOULD YOU INVITE TO A LIBRARY FOCUS GROUP?
1. What kind of community do you want to live in?
2. Why is that important to you?
3. How is that different from how you see things now?
4. What are some of the things that need to happen to create that kind of change?

Focus on the community rather than the library.
WHO ARE THE LEADERS IN YOUR COMMUNITY?
Three Questions

1. What challenges will your organization face in the next 2-3 years?
2. What major decisions will you need to make in the next 2-3 years?
3. What goals or aspirations would you like to see come to fruition over the next 2-3 years?

Interviewing Community Leaders
BOARD RETREAT
“What needs to happen to ensure the library is a long-term success?”

1. Post-its and Sharpies.
2. One response per Post-it.
3. Randomly stick Post-its to the wall.
4. Silently, the group categorizes similar responses.
5. Facilitator titles each category of responses.
Analyze What You Have Learned
FIND THE DEEPER MEANING
READ ALL DATA REPORTS
SOAR

- Strengths
- Opportunities
- Aspirations
- Results
SOAR Analysis

Questions to answer when conducting a SOAR analysis.

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future?
4. What are the measurable results that will tell us we’ve achieved that vision of the future?
Assess Library’s Capacity to Move Forward
Moving Forward

How can the library move forward in these areas?

- Personnel
- Finance
- Facility
- Policy
- Partnerships
- Governance
- Marketing & Public Relations
- Measurement & Evaluation
Final Plan
3 to 5 Broad Priorities
Library Plan

SECTION ONE: PLANNING SUMMARY

SECTION TWO: MISSION STATEMENT

SECTION THREE: GOALS

1) Goal/Project/Priority
   a) Project Leader:
   b) Purpose:
   c) Measurement:
   d) Objective:
      i) Action steps:

2) Goal/Project/Priority
   a) Project Leader:
   b) Purpose:
   c) Measurement:
   d) Objective:
      i) Action steps:
Evaluation

Look at the past in order to plan for the future.

1. Choose what to measure and how
2. Have pre-planned measurements and in place
3. Assess objectives and action items on a regular basis
4. Set an evaluation schedule for your plan
5. Reevaluate goals, objectives, and action items as needed
Final Notes
PLAN TO THRIVE, NOT JUST SURVIVE
MAKE CHOICES WITH AN EYE TOWARD ENDURING INSTITUTIONS
DON'T LEAVE ANYTHING TO CHANCE
YOUR PLAN SHOULD SUPPORT YOUR BUDGET

YOUR BUDGET SHOULD SUPPORT YOUR PLAN
END