Strategic Planning

with Ron Kirsop

Why Plan

Plan to Plan

Five Step Planning Process

Final Plan

Planning Thoughts/Tips

FOCUS AREAS

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

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

1 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

Reflect on the most significant events that have impacted the library.

- 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.

2 Assessment

Areas of Assessment

Evaluate how and when the library is being used.

Internal

- Circulation Statistics
- Programming Attendance
- Technology Usage
- Space Usage
- Door Count
- Hours of Operation

External

- Census Data
- Trendspotting
- Town Master Plans
- School Board Master Plans
- Other Community Organizations

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.

3 Gather Community Input

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?

Focus Group Questions

Focus on the community rather than the library

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?

WHO ARE THE LEADERS IN YOUR COMMUNITY?

Three Questions

Interviewing Community Leaders

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?

BOARD RETREAT

Board Activity

"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.

4 Analyze What You Have Learned

FIND THE DEEPER MEANING

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

GOOD ONES

BAD ONES

STRENGTHS

WEAKNESSES

INTERNAL

OPPORTUNITIES

THREATS

EXTERNAL

GOOD ONES

BAD ONES

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?

5 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

Plan Template

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

YOUR PLAN SHOULD SUPPORT YOUR BUDGET

YOUR BUDGET SHOULD SUPPORT YOUR PLAN

END