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Strategic Planning 201

2017 NHLTA Conference
Presented by Deb Hoadley



A strategic plan is a description of the proposed path at a single point in time...

Main components of a plan:

- Includes a vision which drives decisions
- Process oriented
- External forces
- Allows organizations to respond to changes in environment
- Carefully designed to serve a particular purpose

Planning Process

- ◆ Community Planning Committee
 - SOAR (Strengths, Opportunities, Aspirations, Results)
 - Community Vision
- ◆ Focus Groups
- ◆ Survey
- ◆ Gather demographics, community master plan, library statistics
- ◆ Look at library trends
- ◆ Write plan

Other questions to ask your community:

1. What are the big issues that your community is facing over the next 18-24 months?
2. What would success look like?
3. Who else should we talk to?

Parts of the Plan

Parts of Plan	Definition
Mission Statement	Statement of purpose; fundamental reason for the library's existence; major service role
Vision Statement	What the library wants to be; how it wants to operate; concentrates on the future
Goals	Broad statements describing desired results (not measurable)
Objectives	Specific, short range statements of results that help to implement the goal; define what will be done, by who and by when (measurable)
Actions/Activities	The means to accomplish an objective; specific tasks; specific time to accomplish
Outcomes	A final result; something that comes from an action
Methodology	Identification of the specific planning process; including assessment of user needs (surveys, focus groups, forums)

Template

Part 1: Introduction

Purpose of plan

Acknowledgements

Library History (Optional)

Methodology

Assessment of Needs and Wants

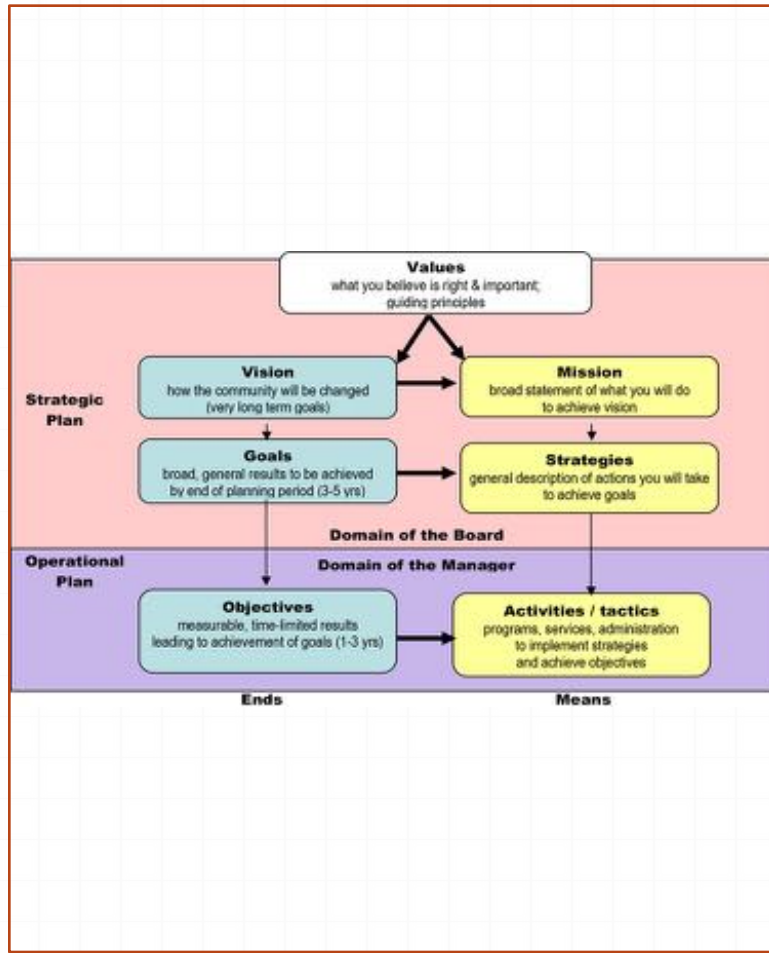
Part 2: Strategic Plan

Part 3: Appendix

Survey Results

Info gathered

Two Views



Mission Statement

Fundamental reason for the library's existence. What is the library all about and what does it do to serve the community?

YOUR TURN!

Write down a 6-10 words that relate to what the library does. Turn those into 2-3 sentences.

Vision Statement

Reflect what the library hopes to be in the future.

YOUR TURN!

Write down some key words. Then put them into one of these sentences:

The library will be...

The library strives to be...

Goals

Major areas the library will focus on in the next 5 years to achieve the mission and move the vision forward.

Broad statements – not measurable

YOUR TURN!

Write down 3 possible goals.

Start with a verb.

Objectives

Statements that can be measurable and relate to the goals. Define what will be done.

YOUR TURN!

Choose one goal. Write 2-3 things the library will do to implement these goals.

Start with a verb

Actions/Activities

What will be done to accomplish the objective? Specific tasks and timeframe.

YOUR TURN!

Choose one objective. Write 2-3 activities that will help to get this done.

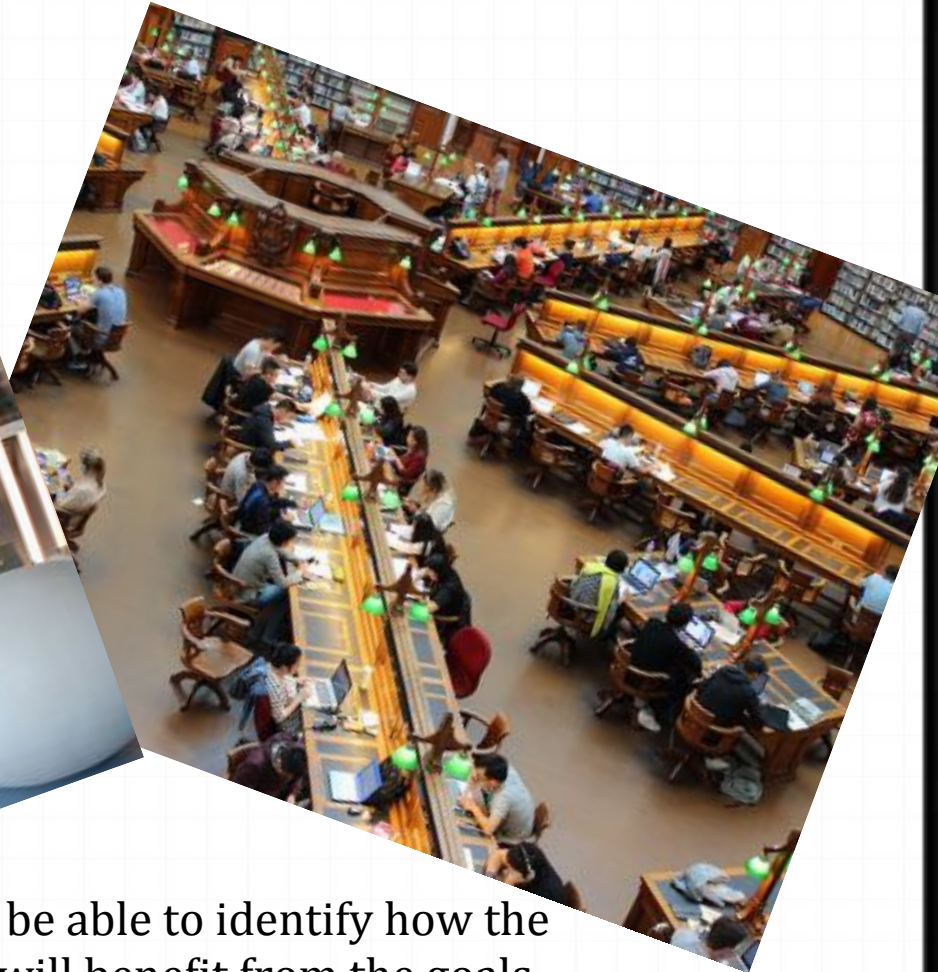
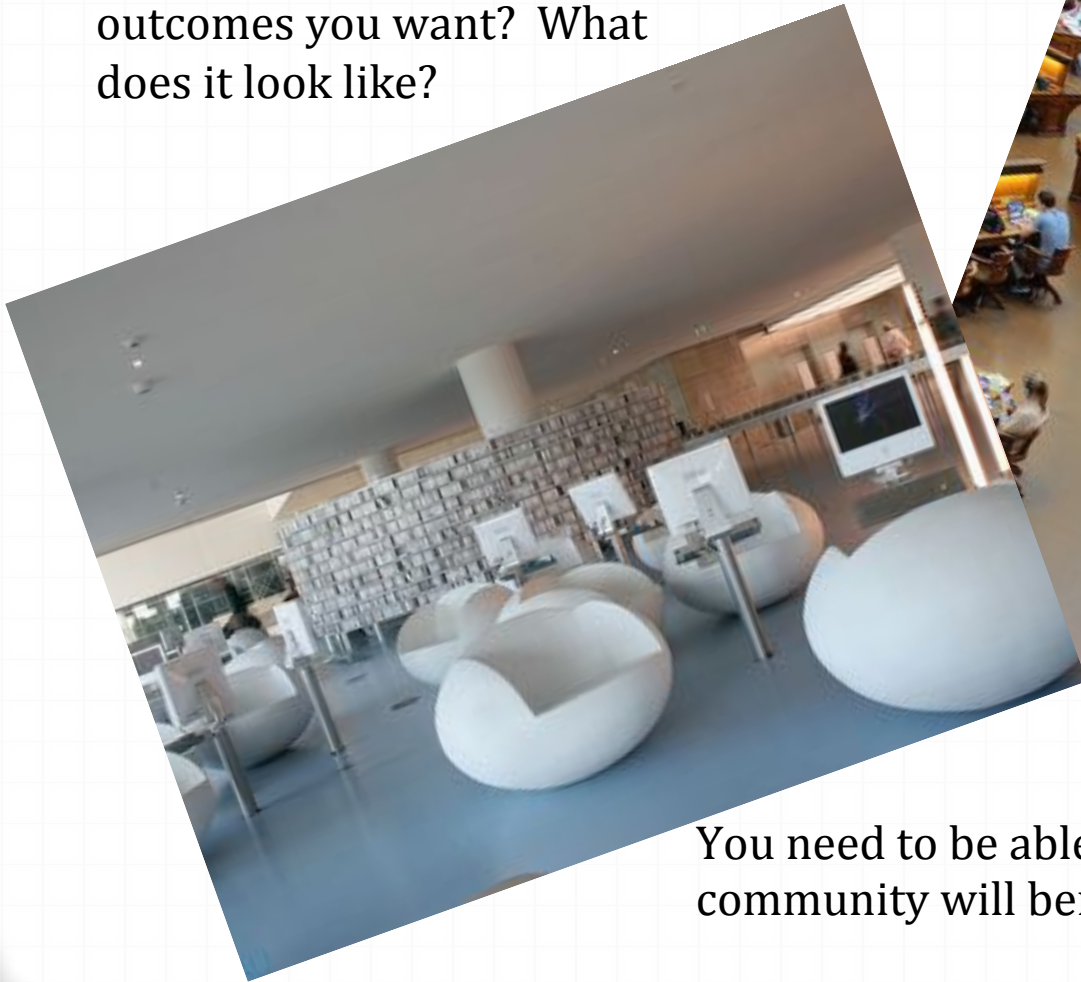


*If the plan doesn't work, change the actions,
but never the goal.*

Keeping the language broad so there can be flexibility within the goal. What does this mean? In order to keep on the path, you may have to change what it is you do to accomplish the goal. Adjust the action steps.

Outcomes

What is the impact and outcomes you want? What does it look like?



You need to be able to identify how the community will benefit from the goals.

Resources

United for Libraries (Association of Library Trustees, Advocates, Friends and Foundations – Division of ALA)

Tip Sheet #3 Mission Statements

Crash Course in Strategic Planning by Stephen A. Matthews and Kimberly D. Matthews, 2013.

Appreciative Inquiry: change at the speed of imagination by Jane Magruder Watkins, Bernard J. Mohr, Ralph Kelly, 2011.

Northsky Strategic Planning Template

Library Bill of Rights



Questions? Comments?

Deb Hoadley

Debhoadley@hoadleyconsulting.com