

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

A grayscale photograph of four people standing back-to-back in a room. From left to right: an older woman with glasses and a vest, a younger woman with glasses, a woman with a bouquet, and a man with glasses. The text 'PLANNING TEAM' is overlaid in the center in a white, sans-serif font. A thin blue vertical line is positioned to the right of the word 'TEAM'.

PLANNING TEAM

Planning Project Charter

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

SURVEYS

The background is a dark, textured surface, possibly a piece of paper or a book cover. A white pen is visible in the lower-left corner, angled upwards. A small, dark, irregular object is located in the upper-right quadrant. The word "SURVEYS" is written in white, uppercase letters in the center-left area, followed by a vertical blue line.

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?



INTERVIEWING COMMUNITY LEADERS

*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

READ ALL DATA REPORTS



STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

GOOD ONES

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

BAD ONES

GOOD ONES

STRENGTHS

WEAKNESSES

INTERNAL

OPPORTUNITIES

THREATS

EXTERNAL

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:

*"IF YOU WANT TO KILL ANY IDEA IN
THE WORLD, GET A COMMITTEE
WORKING ON IT."*

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

DON'T LEAVE ANYTHING TO CHANCE

REMEMBER SUSTAINABILITY

*MAKE CHOICES WITH AN EYE TOWARD
ENDURING INSTITUTIONS*

END