

**Planning for Results Strategic Planning Process**

*adapted by Ashlee Tominey, Library Development Consultant at the State Library (February 2013)*

To be effective, planning must:

- focus on service to the community and what people receive from that service (results)
- involve the community in a group discussion
- build in evaluation (have measurable objectives)
- continue past the planning year with regular review and adjustment

**Assumptions**

**Excellence must be defined locally.** It results when library services match community needs, interests, and priorities.

**Excellence is possible for both small and large libraries.** It rests more on commitment than on unlimited resources

**Excellence is a moving target.** Even when achieved, excellence must be continually maintained.

**Key Points**

**Community Based Planning:** The *Planning for Results* process begins by asking key community stakeholders to define a vision for the community served by the library, and to identify what needs to happen in the community to reach that vision. These community needs provide the framework to determine how the library can make a contribution toward achieving the community vision. This in turn helps to answer the question, "What difference does the library make?"

**Library Service Priorities:** *Planning for Results* includes eighteen public library priorities (service responses) and encourages library planners to select the priorities that match the community needs identified through the visioning process. This will ensure that the library board members, managers, and staff are using their energies and resources to provide the services that matter most to the people of the community.

**Measures of Progress:** There is a strong emphasis on measurement and evaluation in *Planning for Results*, which includes four categories of measures:

- Number of people who use a service or program
- Those users' perceptions of the service or program
- The difference the service or program makes in the individual user's knowledge, skill, attitude, behavior, or condition
- The number of units of library service delivered (circulation, number of programs presented, etc.)

**Managing Change:** Planning is ultimately about change, and *Planning for Results* includes guidelines and suggestions to help library board members, managers, and staff use the results of the planning process to reshape the services and programs offered by the library. Public libraries are being transformed, and this planning process provides the framework that library leaders need to manage that transformation effectively.

## ***Planning for Results Phases and Tasks***

### **PHASE 1: PLAN TO PLAN (MONTH 1)**

Task 1: Design the Planning Process

Task 2: Start the Planning Process

### **PHASE 2: IDENTIFY SERVICE PRIORITIES (MONTHS 2-3)**

Task 3: Identify Community Needs

Task 4: Select Service Responses

### **PHASE 3: SET THE STAGE (MONTH 4)**

Task 5: Prepare for Change (can be done in Phase 1 if needed)

Task 6: Consider Library Values and Mission

### **PHASE 4: DESCRIBE THE FUTURE (MONTH 5)**

Task 7: Write Goals and Objectives

Task 8: Identify Organizational Competencies

### **PHASE 5: COMMUNICATE THE PLAN (MONTH 6)**

Task 9: Write the Strategic Plan and Obtain Approval

Task 10: Communicate the Results of the Planning

### **PHASE 6: THE REST OF THE STORY (ONGOING)**

Recommend *Implementing for Results: From Ideas to Action*

Sample Public Library Planning Timeline

<p><b>Task 1</b></p> <p>↓</p>	<p><b>Design Your Planning Process</b></p> <p>Library will work with Consultant to identify why the library is planning, define responsibilities in the process, prepare a schedule, and communicate to Board and staff (can include orientation on why planning is important given by Consultant. Can also include SWOT analysis led by Consultant).</p>	<p>Month ONE</p>
<p><b>Task 2</b></p> <p>↓</p>	<p><b>Start the Planning Process</b></p> <p>Library will obtain Board approval, and Consultant will prepare fact sheets about the community and the library and share with Library.</p>	
<p><b>Task 3</b></p> <p>↓</p>	<p><b>Identify Community Needs</b></p> <p>Library will develop survey to determine current conditions in the community based on examples and samples given by Consultant. Library will distribute survey. Consultant will compile data and share with Library.</p>	<p>Month TWO</p>
<p>↓</p>	<p>Library determines if they want focus groups conducted. If so, Library identifies community members for focus groups, works with Consultant on questions, and then hosts the focus groups while the Consultant facilitates the groups. Consultant will compile information and share with Library. Library will examine what they can do to reach community vision.</p>	<p>Month THREE</p>
<p><b>Task 4</b></p> <p>↓</p>	<p><b>Select Service Responses</b></p> <p>Based on information and feedback gathered, Library selects 3 – 5 service responses (can use Board and staff for help and Consultant can review).</p>	
<p><b>Task 5</b></p> <p>↓</p>	<p><b>Prepare for Change (can be done in first phase if needed)</b></p> <p>Library will work with staff to prepare for change, increase communication, and provide training if need is determined. Consultant can make presentation to Board and staff on importance of planning during the start of the process.</p>	<p>Month FOUR</p>
<p><b>Task 6</b></p> <p>↓</p>	<p><b>Consider Library Values and Mission</b></p> <p>Library will define Library's values and review, revise, or create the Library's mission.</p>	
<p><b>Task 7</b></p> <p>↓</p>	<p><b>Write Goals and Objectives</b></p> <p>Library writes goals and objectives and determines the priorities of goals and measures of progress for each. Consultant will review and provide feedback.</p>	<p>Month FIVE</p>
<p><b>Task 8</b></p> <p>↓</p>	<p><b>Identify Organizational Competencies</b></p> <p>During the goal-setting process, capture any raised organizational capacity issues. Library then writes organizational competencies and initiatives.</p>	
<p><b>Task 9</b></p> <p>↓</p>	<p><b>Write the Strategic Plan and Obtain Approval</b></p> <p>Library writes plan and Consultant reviews and shares feedback. Library submits for Board approval and shares with staff.</p>	<p>Month SIX</p>
<p><b>Task 10</b></p> <p>↓</p>	<p><b>Communicate the Plan</b></p> <p>Library defines the target audiences, develops a communication plan, develops communications to target audiences and distributes final plan.</p>	
<p><b>Phase 6</b></p>	<p><b>The Rest of the Story</b></p> <p>Consultant recommends Library use <i>Implement for Results: From Ideas to Action</i></p>	<p>Ongoing</p>