Strategic Planning

In order to determine where the library plans to be in the short and long term, various components of the strategic planning process are helpful. The environmental scan, SWOT analysis, goals and objects, metrics all fit together.

Vickers, Mark. “Turning Strategy into Execution.” American Management Association. “Clarity, alignment, leadership, adaptability, and resources all play a role in turning the best laid plans into organizational successes....”

“Organizations that want to survive, prosper, and do good and important work must respond to the challenges the world presents. Their response may be to do what they have always done, only better, but they may also need to shift their focus and strategies.” Bryson, John M. Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement. 3rd ed. San Francisco, CA: Jossey-Bass, 2004. Available through Access Pennsylvania Database. Table of contents and excerpts are available on the publisher’s website.

Matthews, Joseph R. Strategic Planning and Management for Library Managers. Westport, CT: Libraries Unlimited, 2005. Available through Access Pennsylvania Database. He discusses the plan, not as an end result, but as a moving vehicle to keep the library’s mission, vision and strategic vision in sync and aligned to current realities.

Nelson, Sandra S., Ellen Altman and Diane Mayo. Managing for Results: Effective Resource Allocation for Public Libraries. Chicago, IL: American Library Association, 2000. Available through Access Pennsylvania Database. If you thinking about a new strategic plan or updating one, this was the place to start. Electronic workforms are still available.


This American Library Association presentation, “Revolutionary, Not Evolutionary,” by Charles Brown, the director of The Public Library of Charlotte & Mecklenburg County, is slick. Once you see the library’s vision, you can easily understand how they have methodically gone about trying to achieve this goal.
See slide 7 as an example of clear, concise description. See also slides 8, 26 and 29.

“Strategies for Outcome Management,” webcast and slides by Josephine Jones Coordinator, Escondido Public Library Literacy Services, are meant to assist you in the process of developing excellence in your services. She discusses different ways to approach strategic planning.

The National Institutes of Health has a series of useful videocasts and podcasts, one of which is “Goal Setting for the New Year.” This hour-long session goes into great deal about how to establish doable, measureable goals and objectives.

Pat Wagner presented “Fast, Cheap, Good Enough: Practical Strategic Planning When You Don't Have Time or Staff” for the Rural Initiative Videoconference and Webcast. “Strategic planning is vital for libraries, no matter how small, understaffed, overworked, rural or poor. It helps establish goals and priorities and makes communication more effective, which in turn can keep things saner.”

Scenario development is a useful tool to understand future options. NetMBA’s brief article, “Scenario Planning,” provides a quick overview of the topic.


Lyrasis staff has compiled various documents helpful with scenarios for strategic planning. See also The Library Strategic Planning Toolkit developed by Stephen Spohn and Arnold Hirshon. This is available for purchase; the sample includes the introduction and one section which is certainly worth viewing.

“Building Leadership Skills: Strategic Thinking,” an Infopeople Workshop held March 2009 provides lots of information on how to get your messages heard and understood once you have “packaged” them. The Infopeople Project is supported by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act, administered in California by the State Librarian.

Often strategy and tactics are confused. For a quick reminder about the difference see “The Difference Between Strategy and Tactics.”

Needs assessment

Gail McGovern’s slides for an Infopeople presentation in 2008, “Needs Assessment: Asking Significant Questions,” provides an outline to get started. See also her article in CLENExchange 16, no.4 (June 2000) 1, 6, “How to Overcome Resistance to Assessing Needs.”
SWOT


**Strategic plan examples**

*Cleveland Heights Public Library*, OH  The library uses a balanced scorecard approach.

*Altadena Library District*, CA
*Canton Public Library*, OH On YouTube.
*Public Library of Charlotte and Mecklenburg County*, NC  Note slides 14+ “Goals for Continued Investment in Our Strengths.”

*Durham County Library*, NC  Uses a wiki for public response.
*Carnegie Library of Pittsburgh*, PA
*Cumberland Library System*, PA
*Buffalo and Erie County Public Library*, NY
*Worchester Public Library*, MA
*Cedar Rapids Public Library*, IA
*Arlington Public Library*, TX
*St. Charles Public Library*, IL
The *Delaware State Library* posted several plans. Note also their balanced scorecard.

**Mission Statements**


Sample mission statements and even more statements are readily available.

**Values Statements**

**Sterling Heights Public Library, MI**  
**Public Library of Cincinnati and Hamilton County, OH**  
**Foundation Center.** This is included because it divides values into two sections—beliefs and practices.

**Goals and objectives**

Here’s the definitions for S.M.A.R.T. goals.

Tulane University’s “Tips for Writing Goals and Objectives” provides lists of useful verbs.

**Library Goals and Objectives**  
**Champaign Public Library, IL**  
**Akron-Summit Public Library, OH**  
**Mesa County Libraries, CO**

**Evaluations**

The Institute of Museums and Libraries has a wealth of information about outcome based evaluation in their webography and presentations.

http://www.lib.az.us/extension/planning.cfm (At bottom of page. Didn’t check the sources.)


The Foundation Center has links that will provide additional information on program evaluation.
Bradley, Chris, Martin Hirt and Sven Smit, “Have You Tested Your Strategy Lately? McKinsey Quarterly, January 2011. See especially the sections on trends and bias. You will need to register to read the entire article.

**Sustainability**

George Needham and Joan Frye Williams presented a podcast, “Thinking Out Loud about Sustainability” for Infopeople, February 17, 2011. Infopeople is supported by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act, administered in California by the State Librarian. “Sustainability addresses not only what we should be doing but how we can continue doing it over the long haul. They identify four types of sustainability: existential (why do we exist?), operational (how do we build capacity?), political (who we work with to make common cause?), and financial (what resources do we need, and what do we have?).”

**WebJunction Courses**

WebJunction Pennsylvania provides a large selection of free and discounted online workshops and training courses available to library employees, library board members, and trustees in the Commonwealth of Pennsylvania. This service is supported by a grant from the Office of Commonwealth Libraries. Log on to your account for access to courses such as:

- Strategic Planning: The Five-Minute Introduction (LE@D)
- Strategic Planning and Positioning for IT Projects
- Strategic Planning and Risk Management
- Strategic Planning: Quick, Cheap, and Decent (LE@D)
- Goal Setting - Goal Setting in the Organizational Environment
- The Communication of a Shared Vision
- Leadership Essentials 2: Communicating Vision