



Memo to the Library Board of Trustees-
Meeting of July 13, 2016
From: Chris Kreiden, Library Director

Subject: Discussion of Potential Library Strategic Planning

I thought you all might find the Napa County Library's Strategic Plan of interest. The document can be found at <http://countyofnapa.org/library/aboutus/>.

There was curiosity expressed at the last Board meeting about the information I received from Yolanda Cuesta concerning strategic planning. What I received from her is attached.

I have also included in this packet a SHPL Strategic Plan Process Proposal put together by Bob.

Finally, I thought you might be interested in seeing a one page strategic focus plan. This document is being used by the Sno-Isle Libraries. You can find it at <http://www.sno-isle.org/about/strategic-focus/>

I hope this information is helpful.

FIGURE 1**Planning for Results Tasks and Steps**

Task 1: Design the Planning Process

- Step 1.1: Identify the reasons for planning
- Step 1.2: Define planning responsibilities
- Step 1.3: Prepare a planning schedule and budget
- Step 1.4: Develop a communication plan
- Step 1.5: Design and present a staff orientation

Task 2: Start the Planning Process

- Step 2.1: Obtain board approval
- Step 2.2: Select community planning committee members (12)
- Step 2.3: Invite committee members
- Step 2.4: Prepare and distribute community and library information packets

Task 3: Identify Community Needs

- Step 3.1: Present an orientation for the members of the planning committee
- Step 3.2: Develop community vision statements
- Step 3.3: Define current conditions in the community
- Step 3.4: Decide what needs to be done to reach community vision

Task 4: Select Service Responses

- Step 4.1: Present an overview of the library to committee members
- Step 4.2: Select preliminary service responses
- Step 4.3: Describe the effect of preliminary service responses on current library services
- Step 4.4: Select final service responses

Task 5: Prepare for Change

- Step 5.1: Assess the library's readiness for change
- Step 5.2: Plan to create a positive environment for change
- Step 5.3: Review and revise communication plans
- Step 5.4: Train supervisors and managers

Task 6: Consider Library Values and Mission

- Step 6.1: Define values
- Step 6.2: Consider the library mission

Task 7: Write Goals and Objectives

- Step 7.1: Write system goals
- Step 7.2: Write system objectives
- Step 7.3: Determine the priority of goals and measures of progress for each unit

Task 8: Identify Organizational Competencies

- Step 8.1: Understand organizational competencies and initiatives
- Step 8.2: Identify organizational issues
- Step 8.3: Write organizational competencies and initiatives

Task 9: Write the Strategic Plan and Obtain Approval

- Step 9.1: Write and review the strategic plan
- Step 9.2: Submit the strategic plan for approval

Task 10: Communicate the Results of the Planning Process

- Step 10.1: Define the target audiences
 - Step 10.2: Develop a communication plan
 - Step 10.3: Develop communications to target audiences
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Role of Community Planning Committee

The Community Planning Committee, the library staff, and the library board are the key players in developing the library's strategic plan and directions for the next 3-5 years.

The Community Planning Committee serves in an advisory capacity to the library board in developing the strategic plan. They are on the committee to be sure that the needs and viewpoint of the specific constituency or demographic group they are familiar with are represented in the planning effort.

The Committee will bring their knowledge of the community to develop a community vision, and discuss what needs to happen to move the community towards the vision. They will review and prioritize the needs expressed by the community at the focus groups and community forum. The Committee will then identify the services that the library should provide to help meet the needs and move the community toward their vision.

The work of the Community Planning Committee will be the foundation that library staff will use to develop goals and objectives to implement the plan. The plan will be reviewed and adopted by the library board.

St. Helena Public Library Strategic Planning Process

Roles and Responsibilities

St. Helena Community

Participate in Community Forum and Focus Groups as appropriate

Community Planning Committee Members

Attend Planning Committee meetings

Actively participate in discussions

Review draft plan

Talk about the process with friends, neighbors, organizations, etc.

Library Administration

Design, coordinate and implement planning process

Provide library data/overview for planning committee

Attend and participate in Planning Committee meetings

Keep people informed (internal and external)

Library Staff

Provide community and library information as needed

Provide support for Focus Groups and Community Forum

Develop service goals and objectives

Draft and make revisions to plan

Library Board

Participate in community Planning Committee (1-2 members)

Review and adopt strategic plan

Serve as liaison with governing body

Advocate for library

Promote plan to community

Friends

Listen to and represent the community

Participate in Focus Groups and Community Forum as appropriate

Advocate for library

Promote plan to community

Consultant/Facilitator

Provide advice on process design and implementation

Plan and facilitate Focus Groups and Community Forum

Plan and facilitate Planning Committee meetings

Plan and facilitate Staff Planning Session to draft goals and objectives

Summarize data from process

Community Resource List

Note: This list is not all inclusive; selected examples are in ().

You DO NOT need to contact every category on the list.

You DO need to tailor your list to your community.

You DO need to reach out to people not usually included.

- Youth Service Organizations (Big Brother/Sister, Boy Scouts, child abuse agencies, recreation programs, Girl Scouts, Jr. Achievement, Head Start, Even Start, child care associations, Association for the Education of Young Children, school age care and enrichment programs)
- Women's Centers/Service Organizations (battered women' shelters, YWCA, NOW)
- Refugee/Immigrant Centers/Services (Catholic Social Services, refugee rights association)
- Religious Organizations (church organizations, ministerial association)
- Senior Centers/Service Organizations (Area Agency on Aging, elder abuse/care agencies, RSVP)
- Organizations of/for People with Disabilities (center on deafness, council of the blind, health and human services agencies, Easter Seals, Goodwill, independent living centers, United Cerebral Palsy)
- Organizations serving the homeless (food closet, homeless assistance program, Salvation Army)
- Organizations serving ex-offenders (Department of Corrections, Friends Outside)
- Technology Experts (computer clubs, consultants, community colleges, Internet providers, universities)
- Organizations fighting discrimination (Anti-Defamation League, human rights groups, NAACP)
- Miscellaneous Organizations (arts and cultural groups, athletic groups, censorship groups, historic preservation groups, local neighborhood groups, men's groups, veterans' groups, women's groups)

Community Resource List, continued

- Educational Organizations (community colleges, multilingual programs, PTA/PTO, school board, other libraries, private schools, home school organizations, higher education institutions/organizations)
- Government/Political Representatives (mayor, city council, county supervisors, city/county fiscal office, law enforcement, job training programs)
- Health Organizations (American Cancer Society, American Heart Association, hospitals, public health nurses, early intervention programs, public health clinics)
- Legal Organizations (ACLU, bar association, legal aid, NAACP Legal Defense Fund)
- Ethnic Organizations (Asian Resources Center, Hispanic centers, Inter-tribal Council, Urban League)
- Family Services Organizations (Social Services Department, Family Service Agency, Jewish Family Service)
- Media Representatives (newspaper, radio, TV, ethnic media, local magazines and newsletters)
- Financial Representatives (bankers, credit unions, financial planners, stockbrokers)
- Community Services Organizations/Associations/Clubs (AARP, AAUW, American Red Cross, B&PW, Kiwanis, Lions, Literacy Organizations, Rotary, Soroptimists, United Way)
- Economic Development Organizations (economic development councils, real estate brokers)
- Businesses/ Chambers of Commerce/Visitor's Bureaus (major employers, minority business owners, small business owners; city, county and ethnic chambers)

SHPL Strategic Plan Process Proposal

There are many ways to go about developing a strategic plan. Based on previous strategic planning experience and research into how other libraries have done it, I suggest something like the following:

Purpose

A concise statement of the purpose of the Strategic Plan

A vision of the purpose of the Library

Scope

What timeframe should the strategic plan cover?

What is our timeframe for developing the plan?

To what extent is the library staff going to be involved?

Community Assessment

Who is the library trying to serve? Create categories that will be useful for assessing needs and determining the strategy, e.g.

Grouped by their relationship to the library:

- Current users
- Potential users
- Hardcore nonusers
- Governing bodies
- Staff
- Volunteers
- Partners

Grouped by likelihood of having similar need:

- Families
- Children
- Teens
- Students
- Job Seekers
- Non-English-speaking
- Working people
- Retirees

SHPL Strategic Plan Process Proposal

Validate and further quantify the community groups using already available information , e.g.

- Census information
- Demographics

Needs Assessment

Reason for needs assessment:

- Define gaps in service to communities
- Increase awareness of issues
- Snapshot of current conditions
- Anticipate future changes
- Gather data for planning or grants

What we want to know: For each group:

- What are their characteristics?
- What do they need?
- What is different about each group?
- What are their perceptions, experiences, feelings and opinions about the role of the Library in the community and how the Library meets community needs?
- What are the barriers to Library use?

Review already available information , e.g.

- Collection use statistics
- User surveys

Supplement by actively seeking information from the identified groups. Especially need to collect information from:

- Non-users
- Community members not likely to respond to user surveys

To reach potential users, need to gather data where they are (not in the Library). Design strategies to identify best method(s) for reaching specific target groups. For example:

- Third-party facilitated (e.g. Family Center)
- Focus groups
- Community Events

Situation and Suppositions

Analyze the current Library situation, with the identified community needs in mind.

SHPL Strategic Plan Process Proposal

Roles

- What role does the Library currently play with each audience?

Space

- What does the Library do to make it a great public space?
- How much space is devoted to basic transactions (e.g. checking out books) vs. space for richer experiences?
- What kind of online space does the Library provide?

Enabler

- What does the Library do to help individuals without strong information literacy skills learn how to find high quality and credible information?
- What does the Library do to connect people seeking information to the resources, people or organizations that can provide it?
- To what extent does the Library curate information and make it visible to the community?
- How does the Library help people solve local problems?
- To what extent does the Library host events to promote interaction?

Civic Resource

- How is the Library a civic resource in the community?
- In what ways do library leadership and staff get out of the library and into the community to learn about the needs of the community and its residents?

SHPL Strategic Plan Process Proposal

Literacy Champion

- In what ways is the Library a literacy champion?
 - Adult literacy
 - English as a second language
 - Early literacy
 - Health
 - Legal
 - Financial

Technological

- What steps has the Library taken to meet the changing technological and digital needs of the community?
- What strategies do we have in place to balance the provision of resources in a variety of formats?
- Is the library's current broadband capacity sufficient to meet patron demands for broadband and wireless connectivity at peak times?
- What resources does the Library have to plan and implement new technologies as the information environment and content industries continue to evolve? Are there partners in the community or in state or national networks who can assist with the skills, expertise or capacity that the Library needs?

Strengths

- What are the Library's greatest strengths?
- Of what achievements in the last two years are we most proud?
- What are our greatest assets?

Strategy

How can we best meet the needs of our audiences?

What new skills or resources do we need to move forward?

SHPL Strategic Plan Process Proposal

How to we assure long-Term Sustainability

- What form or consistent funding do we have for operational costs?
- What do we see as opportunities for additional funds for new initiatives?
- What new partnerships, consortia or collaborations could we develop to bring new resources or leverage existing resources?

Identify strategic initiatives to achieve what we want.

Set goals and objectives, steps to implement.

Scenarios

Create scenarios and test strategy against them

Results

How do we measure success now? How should we measure success in the future?

Marketing Plan

How do we plan to market the Strategic Plan and the Library in general to the various community groups?