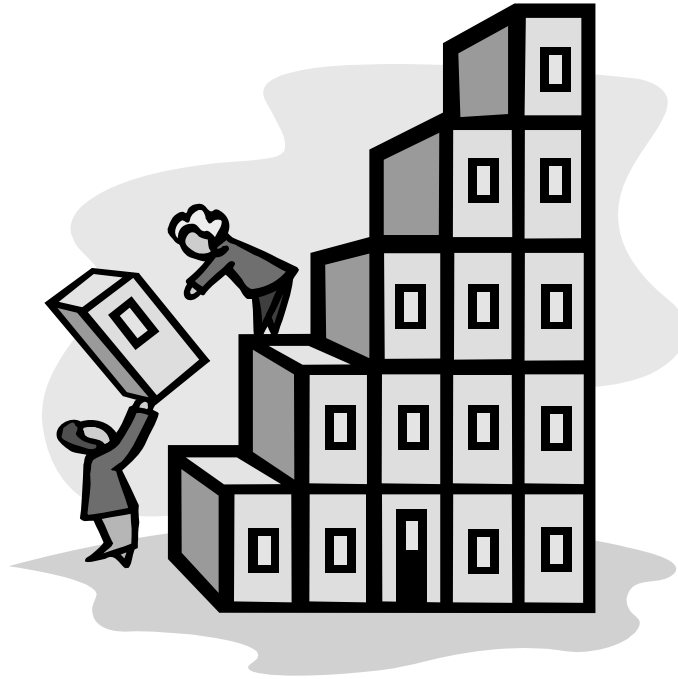


# ***New Planning for Results: Developing a Strategic Plan***



*A strategic plan helps your library realize its full potential.*

*Learn how to:*

- *Identify your role in planning for your library*
- *Define the elements of an effective plan*
- *List the steps and tasks involved*
- *Recognize the timeline for developing an effective plan*

**NJ State Library Trustee Institute – September 29, 2007**

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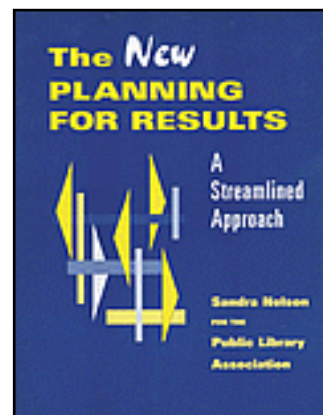
# AGENDA

- Introductions
- Why Plan?
- Your Role in Planning
- Overview of PLA's New Planning for Results
- The NEW Planning for Results: Steps & Tasks
- Service Responses
- Cycle of Improvement
- Sample Timeline

## The New Planning for Results: A Streamlined Approach

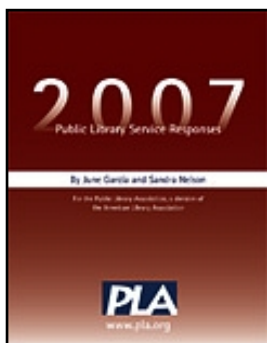
A classic resource, *Planning for Results* has long served to help public librarians envision, evaluate, and respond to community needs with distinctive programs and services.

The *New Planning for Results* continues with an all-in-one guide that outlines a tested, results-driven planning process, revamped and streamlined to enable librarians to respond quickly to rapidly changing environments.



Sandra Nelson. 2001, 316 pages  
ISBN 0-8389-3504-4

American Library Association  
LIST \$58, ALA Member price: \$52.50



## **NEW** Public Library Service Responses 2007

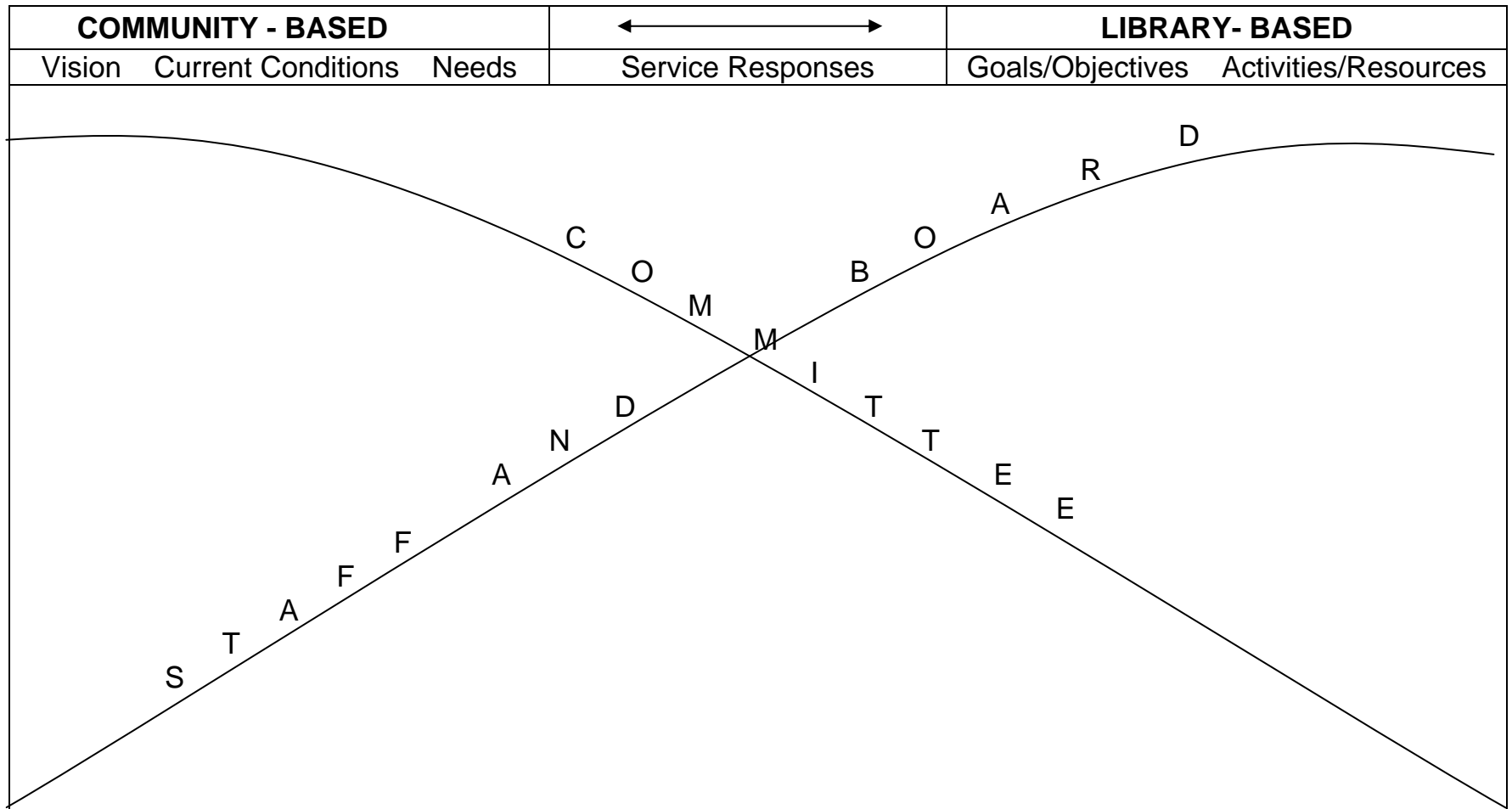
These 18 service responses are an update of the original 13 service responses.

**June Garcia and Sandra Nelson, 2007, 70 pages**

Download PDF Price: \$25, ALA Member Price: \$22.50

**Go to [www.alastore.ala.org](http://www.alastore.ala.org) and search by title**

# PLANNING RESPONSIBILITIES



# THE NEW PLANNING FOR RESULTS

## ASSUMPTIONS

- EXCELLENCE MUST BE DEFINED LOCALLY.  
It results when library services match user 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 New Planning for Results* process begins by asking key community stakeholders to identify a vision for the community served by the library. This helps library planners to determine what the community values and how the library can make a contribution toward achieving the community vision.

***Take a few moments to jot down key community stakeholders  
for your library:***

## KEY POINTS (continued)

- LIBRARY SERVICE PRIORITIES

*The New Planning for Results* defines public library service priorities 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. In 2007, eighteen updated services responses were published (see following page).

- MEASURES OF PROGRESS

There is a strong emphasis on measurement and evaluation in *The New Planning for Results*, which includes three categories of measures:

- Number of people served  
(both total number of users and individual users)
- How well the service met the needs of the people served
- Total units of service delivered

- RESOURCE ALLOCATION

*The New Planning for Results* stresses the importance of allocating the resources required to actually implement the library's plans.

- MANAGING CHANGE

Planning is ultimately about change and *The New 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.

# **THE NEW PLANNING FOR RESULTS STEPS AND TASKS**

## **PREPARE: Planning to Plan**

- Task 1: Design the Planning Process
- Task 2: Prepare Board, Staff, and Committee

## **IMAGINE: Identifying Possibilities**

- Task 3: Determine Community Vision
- Task 4: Identify Community Needs

## **DESIGN: Inventing the Future**

- Task 5: Select Service Responses
- Task 6: Write Goals and Objectives

## **BUILD: Assembling the Future**

- Task 7: Identify Activities
- Task 8: Determine Resource Requirements

## **COMMUNICATE: Informing the Stakeholders**

- Task 9: Write the Plan and Obtain Approval
- Task 10: Communicate the Plan to Staff and Community

## **IMPLEMENT: Moving Into the Future**

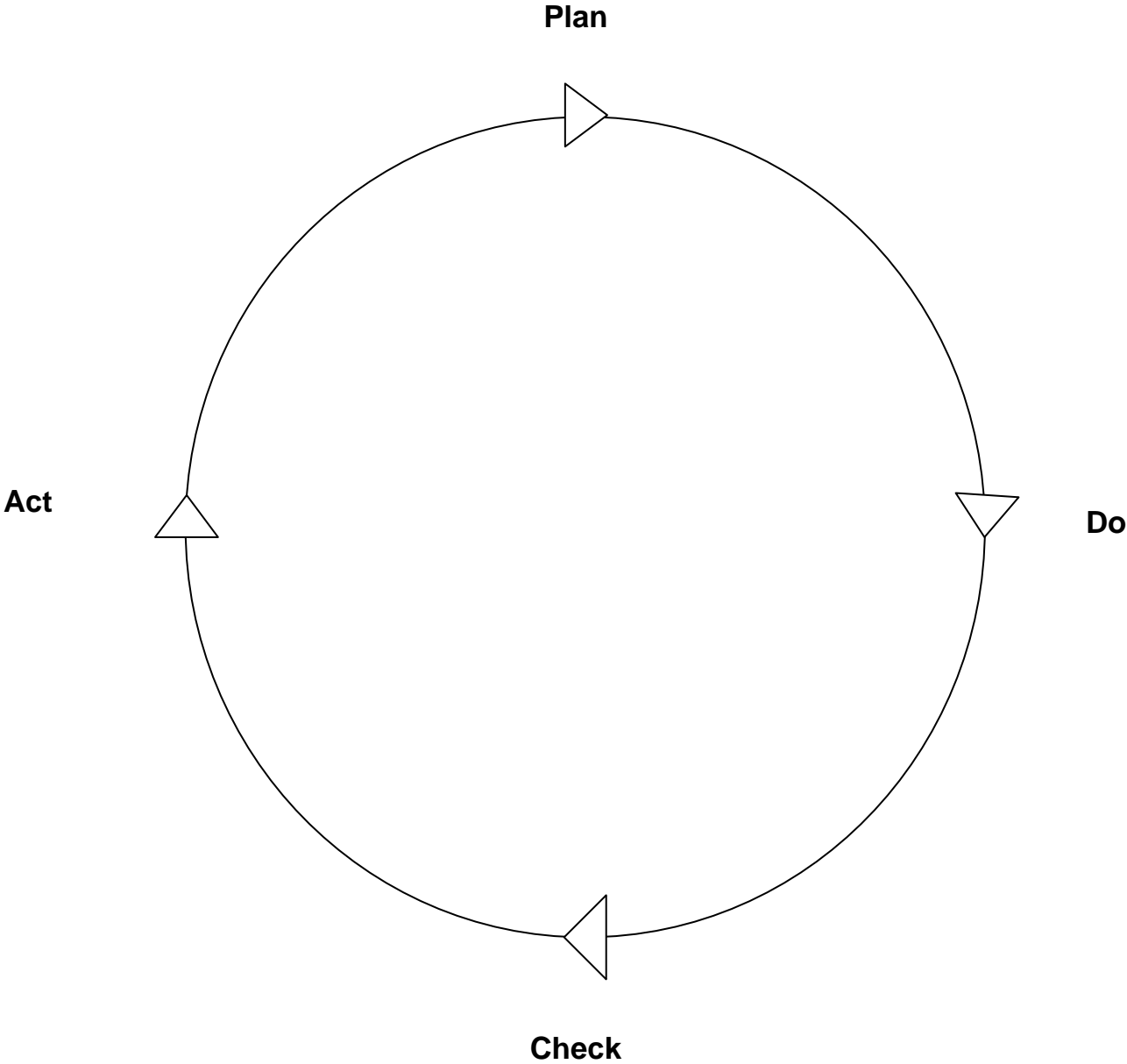
- Task 11: Reallocate Resources
- Task 12: Monitor Implementation

## SERVICE RESPONSES (2007)

- 1. **Be an Informed Citizen:** Local, national, and world affairs. Residents will have the information they need to support and promote democracy, to fulfill their civic responsibilities at the local, state, and national levels, and to fully participate in community decision-making.
- 2. **Build Successful Enterprises:** Business and non-profit support. Business owners and non-profit organization directors and their managers will have the resources they need to develop and maintain strong, viable organizations.
- 3. **Celebrate Diversity:** Cultural awareness. Residents will have programs and services that promote appreciation and understanding of their personal heritage and the heritage of others in the community.
- 4. **Connect to the Online World:** Public Internet access. Residents will have high-speed access to the digital world with no unnecessary restrictions or fees to ensure that everyone can take advantage of the ever-growing resources and services available through the Internet.
- 5. **Create Young Readers:** Early literacy. Children from birth to age five will have programs and services designed to ensure that they will enter school ready to learn to read, write, and listen.
- 6. **Discover Your Roots:** Genealogy and local history. Residents and visitors will have the resources they need to connect the past with the present through their family histories and to understand the history and traditions of the community.
- 7. **Express Creativity:** Create and share content. Residents will have the services and support they need to express themselves by creating original print, video, audio, or visual content in a real-world or online environment.
- 8. **Get Facts Fast:** Ready reference. Residents will have someone to answer their questions on a wide array of topics of personal interest.
- 9. **Know Your Community:** Community resources and services. Residents will have a central source for information about the wide variety of programs, services, and activities provided by community agencies and organizations.

- 10. Learn to Read and Write:** Adult, teen, and family literacy. Adults and teens will have the support they need to improve their literacy skills in order to meet their personal goals and fulfill their responsibilities as parents, citizens, and workers.
- 11. Make Career Choices:** Job and career development. Adults and teens will have the skills and resources they need to identify career opportunities that suit their individual strengths and interests.
- 12. Make Informed Decisions:** Health, wealth, and other life choices. Residents will have the resources they need to identify and analyze risks, benefits, and alternatives before making decisions that affect their lives.
- 13. Satisfy Curiosity:** Lifelong learning. Residents will have the resources they need to explore topics of personal interest and continue to learn throughout their lives.
- 14. Stimulate Imagination:** Reading, viewing, and listening for pleasure. Residents will have materials and programs that excite their imaginations and provide pleasurable reading, viewing, and listening experiences.
- 15. Succeed in School:** Homework help. Students will have the resources they need to succeed in school.
- 16. Understand How to Find, Evaluate, and Use Information:** Information fluency. Residents will know when they need information to resolve an issue or answer a question and will have the skills to search for, locate, evaluate, and effectively use information to meet their needs.
- 17. Visit a Comfortable Place:** Physical and virtual spaces. Residents will have safe and welcoming physical places to meet and interact with others or to sit quietly and read and will have open and accessible virtual spaces that support networking.
- 18. Welcome to the United States:** New immigrants will have information on citizenship, English Language Learning (ELL), employment, public schooling, health and safety, available social services, and any other topics that they need to participate successfully in American life.

# CYCLE OF IMPROVEMENT



# SAMPLE PLANNING TIMELINE

Task 1 ↓	<i>Approval Point</i>	<p><b>Design Your Planning Process</b> Why, what, when, where, who Develop a marketing strategy for the plan</p>	Month ONE
Task 2  ↓  Tasks 3, 4, and 5  ↓	<i>Approval Point</i>	<p><b>ORIENTATION MEETING FOR STAFF AND BOARD</b> (Two-hour meeting, repeated as often as necessary.) <b>Before the Committee Orientation Meeting</b> Develop fact sheets about the community and the library. <b>COMMITTEE ORIENTATION MEETING:</b> (2 hours) Note: This is optional; it may be combined with the Meeting One. <b>PLANNING COMMITTEE MEETING ONE</b> (10:00-3:00 with box lunch OR 4:00-9:00 meeting with box dinner) Note: This may be divided into two meetings. Identify a community vision and needs and select preliminary library service priorities. <b>Before Planning Committee Meeting Two</b> Send committee members, staff, and board notes from Meeting One and photocopies of the full descriptions of the preliminary service responses. Ask library board to review the committee work and approve or recommend changes. Identify current library strengths and weaknesses in relation to the draft priorities. Identify threats and opportunities if drafts become the library priorities.</p>	Month TWO
↓  Tasks 6 and 7  ↓  Tasks 7 and 8  ↓		<p><b>PLANNING COMMITTEE MEETING TWO</b> (10:00-3:00 with box lunch or 4:00-9:00 with a box dinner) Review the library board's response to the vision, needs, and draft service priorities and take any action necessary. Presentation on the staff review of the preliminary service responses. Select final service responses and identify target audiences for each. <b>Before Meetings with Staff Teams</b> Develop goals and objectives based on the service responses and target audiences identified by the planning committee Appoint staff committees to develop a preliminary list of activities for each goal. <b>MEETINGS WITH STAFF TEAMS</b> (As many 1 – 1 ½ hour meetings as needed) Develop a composite list of activities to include in the plan. Based on this list, determine what resources will be required Develop preliminary plans to obtain those resources.</p>	Month THREE
Task 9  ↓  Task 10  ↓  Tasks 11 and 12		<i>Approval Point</i>	<p><b>Before the Planning Committee Meeting Three</b> Prepare a final draft of the library plan and distribute to the planning committee at least one week prior to their meeting. <b>PLANNING COMMITTEE MEETING THREE</b> (2 hours or less) Review final draft and recommend any needed changes. <b>Before Presenting the Plan to the Board</b> Revise the plan as needed and send to board members two weeks prior to their meeting. <b>BOARD MEETING</b> Present the plan to the library board for approval. Note: If you are a city or county department do what is necessary to get the plan officially reviewed and approved.</p>
		<p><b>Communicate Your Plan</b> Distribute final plan to committee, staff, and board and continue to implement the marketing strategy for the plan</p>	Month FIVE
		<p><b>Implement Your Plan</b> Reallocate resources Monitor implementation</p>	Ongoing