

Sample Format for Strategic Plans

New Jersey Public Libraries

- I. **Library Mission and Vision** (Include here your library's current mission and vision. The "vision" is a description of what the world would look like if the library did its job perfectly. The "mission" is a fairly general description of why the library exists, and how it will deliver the services that would bring the vision closer to reality.)
- II. **Letter from President of the Board of Trustees** (See sample letter in attachments. This letter should stress the importance and goals of the planning process)
- III. **Acknowledgements** (In this section, recognize and thank members of the Board of Trustees, Planning Committee, and possibly local elected officials, etc.)
- IV. **Planning methodology** (In this section, explain how the information which provides a foundation for new strategic initiatives was gathered and how the plan was formulated. The expectation is that strategic initiatives should be research-based, and that libraries will use focus groups and at least one of the following to gather community input):
 - a. Community forums
 - b. Surveys
 - c. Leadership interviews
- V. **Executive summary** of highlights of plan (In this section you should provide an overview of the key points of the new plan for those individuals who will read no more than one or two pages.)
- VI. **Profile of township/municipality** from latest Census data (Go the US Census Bureau's website at <http://www.census.gov/> and use the American Community Survey to obtain the most up-to-date demographic information on your community. Key indicators would include population, projected population, ethnicity, age, educational attainment, household and per capita income, individuals below poverty level, etc.)
- VII. **Community needs/local planning goals** (Review local planning and economic development documents, educational statistics, etc. to determine how your library can align services with planning objectives in community development, economic development, educational achievement, public services, etc.)



- VIII. **Background and analysis of current situation and library profile** (Use this section to provide an overview of current operations. Information should include governance, current services, staffing, hours of operation, number of outlets, outreach, funding, etc. It should provide a snapshot of your library in 2011.)
- IX. **Strengths and successes** (The planning team should work as a group to identify the strengths of the library and an overview of recent successes.
- X. Future challenges and needs in areas which will affect the ability of your library to provide services in the future. Here you should be asking such questions as:
- a. **Funding** (Does your library have adequate funding to provide services which satisfy community needs and expectations? Are you spending approximately 12% (good benchmark) of your budget on materials? If not, why not? Does your library meet all minimum state aid requirements?)
 - b. **Staffing** (Does your library have sufficient staff to maintain the hours of operations which your community desires? Is your staff receiving competitive pay?)
 - c. **Facilities** (Is your current space large enough for the size of the community and the level of use? Is it well-maintained or is in need of significant repairs?)
 - d. **Technology** (Do you have enough computers to satisfy community demand? Does your website need to be upgraded? These all need to be defined in the separate Technology Plan. Samples provided at <http://www.njstatelib.org/LDB/E-Rate/utechpln.php>)
- XI. **Level of use for past three years** (Insert in this space a review of performance measures based on the data you provide to the State Library each year. This information will be used to identify trends and make projections regarding future use.)
- a. Circulation
 - b. Computer sessions
 - c. Website visits
 - d. Use of online databases
 - e. Reference questions
 - f. Program attendance
 - g. Library visitors
 - h. Hours of operation
 - i. Children in summer reading

- XII. **Service Priorities** (Goals, objectives, activities, measurements for each service priority. When working on this section, remember that goals are defined as long-term aims your library has. They are harder to quantify or put in a timeframe.

Objectives are more concrete and specific. They are more short term, and more quantifiable. They are the steps you have to take in order to reach your over-arching goals. Objectives should include timelines, projected costs, personnel needs, and ways to measure progress. Suggested areas for exploration might include but not be limited to:

- a. Board and staff development and training
- b. Advocacy and government relations
- c. Fundraising
- d. Technology
- e. Facilities
- f. Customer service
- g. Outreach to diverse populations
- h. Support for education and lifelong learning
- i. Support for economic development
- j. Marketing and public relations

The Library Initiative Litmus Test

In the course of research and planning, many great ideas emerge. To keep the plan focused and its objectives achievable, encourage the planning committee to gauge and prioritize all strategic recommendations by means of a “library initiative litmus test:”

- Is it a “work smart” concept?
- Does it help market and brand the Library?
- Is it practical and actionable?
- Does it make “best use” of resources?
- Does it address multiple goals?
- Does it provide a favorable return on investment?
- Does it offer opportunities for community partnerships?
- Does it leverage interlibrary opportunities?
- Does it satisfy identified community needs?
- Does it align the Library with education and lifelong learning?
- Does it position the Library and its facilities as central to community life?

Sample Strategic Plans

- Moorestown Public Library (NJ): <http://www.moorestown.nj.us/pubs/155/2165.pdf>
- Westford Public Library (VT): http://www.westford.lib.vt.us/assets/FY08_FY12_LRP.pdf
- St. Joseph County Public Library (IN): <http://www.libraryforlife.org/lrp/>
- New Rochelle Public Library (NY): <http://www.nrpl.org/pages/NRPLLngRngPln2005-%202009.pdf>
- Sonoma County Library (CA): <http://www.sonomalibrary.org/stratplan0.html>

Reading

Strategic Planning for Results by Sandra S. Nelson for the Public Library Association Staff, published by American Library Association, Revised edition 2008.

Sample Technology Plans

- <http://www.njstatelib.org/LDB/E-Rate/utechpln.php>