<https://www.nysl.nysed.gov/libdev/helpful/standard02.htm>

Sample Planning Process Outline

This 5-step planning process helps a board identify long-range and strategic goals based on community needs.

1. Develop a board vision. Have a frank conversation at a special planning meeting to discuss your hopes, dreams and concerns for the future of the library and the community. Understanding where everyone is coming from and finding the commonalities amongst yourselves will help as you move forward in this process. The next steps in the process will help test the board’s perceptions and create a unified board vision; but if you don’t have this conversation first, it will be difficult to work as a group once the findings are in.

2. Assessment. Identify local usage trends through library circulation, program and technology usage data. Are there things the community is looking for that you are not or unable to provide at this time? Are there things the community clearly wants more of? Less of? Comparing the library to others with similar budgets or service populations can be a useful planning activity to benchmark capacity. The New York State Library provides a compilation of financial and service statistics through its website at: <http://www.nysl.nysed.gov/libdev/libs/index.html#Statistics>. Here you can find recent and historical data for all public libraries in the nation.

3. Gather input from your community. Talk to your community. Listen to what they have to say. Do not skip this step, it is absolutely critical to the future success of your library. Use a combination of focus groups or community conversations interviews with community opinion leaders, and surveys to get a broad amount of input, from both library users and non-users, which will help the board to identify community trends, aspirations and priorities. Do not ask them what the library should be doing, that is your job and the job of your library director and staff to determine. What you should be talking to them about is what they are experts in: their vision for the future of their family and neighbors in the community you serve.  To fully comply with New York State Minimum Public Library Standards the board must periodically seek community input in the development and evaluation of its service program.  The library director or library system will be able to offer strategies for the effective use of focus groups and community surveys.

•         Your library may find the American Library Association's Libraries Transforming Communities initiative’ Turning Outward resources (<http://www.ala.org/transforminglibraries/libraries-transforming-communities>) a good fit to use during this process with your community.

•         Examples of community surveys can be found on the website of the Mid-Hudson Library System: <http://midhudson.org/topics/trustees/#Planning>

4.         Analyze what you have learned. Examine the assessment and community input information. Then use a “SOAR” analysis to identify the library’s strengths, opportunities, aspirations and results. This will help your organization to focus on current strengths and a vision for the future of developing your strategic goals. The basic questions to be answered are:

•         What are our greatest strengths?

•         What are our best opportunities to help our community reach their aspirations?

•         What is our preferred future?

•         What are the measurable results that will tell us we’ve achieved that vision of the future?

5.         Assess your library’s capacity. Using the lens of the strategic goals developed in step 4, examine your library’s ability to move forward in the direction you have set for the library. Consider the areas of:

•         Personnel

•         Finance

•         Facility

•         Policy

•         Partnerships

•         Governance

•         Marketing & Public Relations

•         Measurement & Evaluation

Through these five steps your board and staff will have the information you need to create and write a solid plan for the future of the library.