

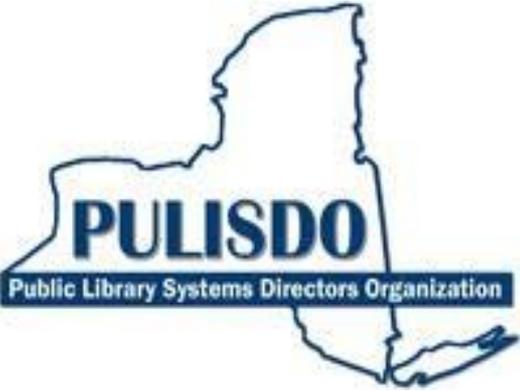


Part Two

# Strategic Planning

## Creating a Path for the Future

New  
York State  
Library



**ITA** | LIBRARY TRUSTEES  
ASSOCIATION  
OF NEW YORK STATE  
*Connecting trustees through advocacy, recognition and education*



NEW YORK LIBRARY ASSOCIATION  
*The Voice of the Library Community*

# Project Sponsors



## Five Step Planning

Identify long-range goals based on community needs.

1. Develop a Board Vision
2. Assessment
3. Gather Community Input
4. Analyze What You Have Learned
5. Assess the Library's Capacity to Move Forward

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3

Gather  
Community  
Input



# STAFF FOCUS GROUP



# Staff Focus Group

Assess the successes and failures of the library from the staff's perspective.

1. What is one thing your library did extraordinarily well in the past 12 months?
  - a. What circumstance(s) allowed this to happen?
2. What is one thing your library did poorly in the past 12 months?
  - a. What circumstance(s) would need to change to allow success?
3. If tomorrow was your first day as the new director, what would be your first priority in preparing the library for the next 2-3 years?



# BOARD RETREAT





## Board Activity

“What needs to happen to ensure the library is a long-term success?”

1. Post-its and Sharpies.
2. One response per Post-it.
3. Randomly stick Post-its to the wall.
4. Silently, the group categorizes similar responses.
5. Facilitator works with the group to title each category of responses.



4

Analyze What  
You Have  
Learned





# SOAR Analysis

Questions to answer  
when conducting a  
SOAR analysis.

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future?
4. What are the measurable results that will tell us we've achieved that vision of the future?

5

Assess Library's  
Capacity to  
Move Forward



# Moving Forward

How can the library move forward in these areas?

- Personnel
- Finance
- Facility
- Policy
- Partnerships
- Governance
- Marketing & Public Relations
- Measurement & Evaluation



# Final Plan



# Plan Template

## Library Plan

**SECTION ONE: PLANNING SUMMARY**

**SECTION TWO: MISSION STATEMENT**

**SECTION THREE: GOALS**

**1) Goal/Project/Priority**

- a) Project Leader:
- b) Purpose:
- c) Measurement:
- d) Objective:
  - i) Action steps:

**2) Goal/Project/Priority**

- a) Project Leader:
- b) Purpose:
- c) Measurement:
- d) Objective:
  - i) Action steps:



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# Handbook for Library Trustees of New York State



# Questions?

Contact your public library system

<http://tiny.cc/PULISDO>