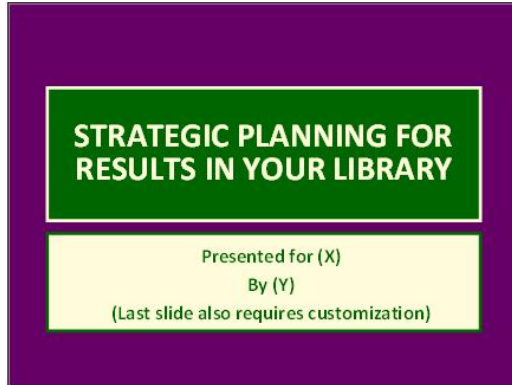


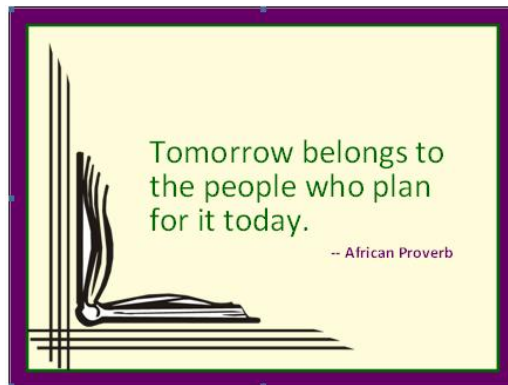
Slide 1



Note that there are a lot of animations in the presentation, you should run through it to get familiar with when you need to click to make things happen.

In these notes, "SP4R" is shorthand for Strategic Planning for Results, and "PoS" is shorthand for Plan of Service.

Slide 2



**Quote slides introduce a new topic. This one introduces SP4R in the larger planning context**

Slide 3



**Libraries and boards are exposed to many kinds of plan. They might be feeling plan overload!**

Slide 4

**Words Matter**

**PRODUCT:** A service that is created.

**PROCESS:** Strategic planning used for creating the item.

“Words Matter” slides clarify terminology. In this case, SP4R and PoS are explained. The PoS is the end plan (and is the term used in Alberta law). SP4R is the process for creating that plan.

Slide 5


Strategic Planning for Results Provides  
It Also Helps You to See What is Missing.  
Both a Framework and Context



This slide shows that the PoS puts all other plans into context. It defines what services the library delivers, the end product. Technology, facilities, etc are means to that end.

Slide 6

The focus is on the people in your community and what they want from the library.



One of the core concepts of P4R and the PoS is that the community is the main focus. Community needs are most important and the community is asked to define needs and pick library service responses.

Slide 7



The process involves community leaders, library staff, and members of the library board.

Community leaders need to provide input on community needs and service responses. Staff need to figure out how to implement services. The board needs to approve everything and the final plan.

Slide 8



**The Plan is a Guide...**

Community Needs  
↓  
Library Priorities  
↓  
Library Goals  
↓  
Library Objectives  
↓

Again, community needs drive everything. This slide also introduces the concepts of goals and objectives, which will be explained later. The term “library priorities” is used when later these will be called “service responses”.

Slide 9



**... for Reallocating Resources**

Library Activities

↓

Staff Needed   Collections Needed   Facilities Needed   Technology Needed

This is getting at the idea that resource allocation, budgeting, staff activities etc should be driven by the plan. This will be brought up again near the end of the slideshow.

Slide 10


**The Underlying Assumption Is...**

The Plan Will Be Implemented  
With New Funding Or Without It



Idea here is that libraries can't just add services on to existing activities – funding is typically static and some things probably have to end for new things to start. And that's OK.

Slide 11

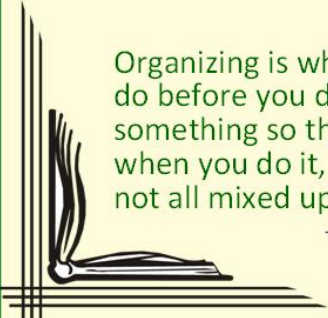


**General Discussion**

What differences do you see between the planning processes you use now and *Strategic Planning for Results*?

Talk about the process they have used in the past to create their Plan of Service. And about whether past PoS's were useful for management of the library.

Slide 12



Organizing is what you do before you do something so that when you do it, it's not all mixed up.

-- A. A. Milne

This quote introduces planning to plan – how you get organized and ready to do the planning process


Slide 13

### Develop a Planning Calendar

Complete your preliminary plan to plan	<b>January</b>	<b>February</b>	<b>March</b>
Appoint Planning Committee	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
Staff Orientation			
First Planning Committee Meeting			
Staff and Board Review of Committee Recommendations	<b>April</b>	<b>May</b>	<b>June</b>
Second Planning Committee Meeting	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Sun. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
Board Acts on Committee Recommendations			
Staff Write Goals and Objectives			
	<b>Action Planning and Implementation</b> →		

The calendar is one of the basic tools for nailing down what you're going to do. A good start is to pick the community planning committee dates, everything else flows from that. (Note that some smaller libraries customize the process and, for example, eliminate one community meeting – that has to be thought through before the calendar is done.) (Note too that concepts like the community planning committee are mentioned here before they've been explained – that will come soon.)

Slide 14



### General Discussion

Do you think that you and your colleagues could complete a plan in this timeframe? What challenges might you face?

Try to draw out from them whether their feelings on doing this planning, and get them to tentatively commit to when they will do it.

Slide 15

### Appoint a Planning Committee

- Cultural Groups
- Educators
- Ethnic Groups
- Local Government
- Seniors
- Service Organizations
- Small Businesses
- Social Service Providers
- Teens

Staff Member  
Board Member

The planning committee. This is an important concept. Explain what it is – a group of community leaders who will meet to define community needs and pick service responses, then meet again to hear the library’s reactions and finalize their findings. Note that they can customize this process if they want, e.g. some libraries find the “committee” word scares volunteers and call this a “focus group” – but defend and advocate the core idea of asking the community what it needs and what the library can do in response.

Slide 16

### Planning Committee Responsibilities

Month One                      Months Three +

Level of Involvement: low (bottom), high (top)

- Review Municipal Plans
- Talk About What Is Important
- Identify Community Needs

The next three slides get across the idea that the community planning committee is active at the beginning of planning, determining community needs -

Slide 17



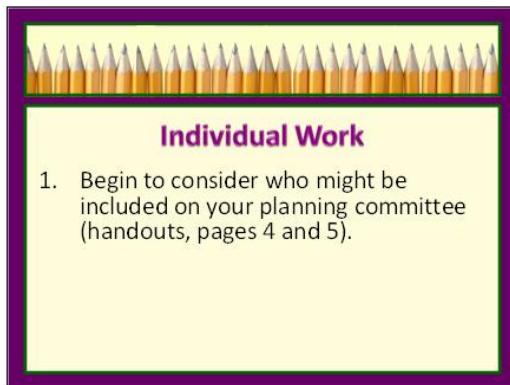
While the board and staff pick up the committee's findings, put them into practice and write the plan -

Slide 18



And all three groups select the library priorities – the service responses that fill community needs.

Slide 19



If you have multiple boards at your presentation, try keeping them in groups so they can actually build a draft committee list for their community.

Slide 20



The slide features a purple border and a light yellow background. At the top, there is a small circular photograph of three people in a meeting. Below the photo, the title "Group Work" is centered in a purple font. The main content consists of two numbered steps in a grey font.

**Group Work**

1. Begin to consider who might be included on your planning committee (Handouts, pages 4 and 5).
2. Discuss your recommendations with your group.

If you have multiple boards, have each board group report back on the groups they want represented (groups, not individuals) – to give the other boards ideas about groups they might include.

Slide 21



The slide has a purple border and a light yellow background. The title "Develop a Communication Plan" is in a green box at the top. Below it, five numbered items are listed in a green font.

**Develop a Communication Plan**

1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

I suggest you don't go into great detail on this. The basic idea is that they should communicate in a deliberate and planned fashion. They should decide what information they need to provide to who at what time, in what form.

Slide 22



The slide has a purple border and a light yellow background. The title "Develop a Communication Plan" is in a green box at the top. Below it, five numbered items are listed in a green font. To the right of these items, a box contains the SMART criteria in a purple font.

**Develop a Communication Plan**

1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

**Specific**  
**Measurable**  
**Action-Oriented**  
**Responsibilities stated**  
**Timed**

I go pretty quickly through this, and just emphasize they need to spend a bit of time and come up with a simple communication plan that tells them who needs to know what at what point in the process.



Slide 23

### Develop a Communication Plan

1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

Staff and Managers

Community Planning Committee

Others??

- Friends of the Library
- City Officials
- Regional Library

Library Board Members

Etc.

Slide 24

### Develop a Communication Plan

1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

What?

Where?

When?

Who?

How?

Etc.

Slide 25

### Develop a Communication Plan

1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

WWW

@

HTTP

MEMO

Mobile Phone

Meeting

Etc.

Slide 26

**Develop a Communication Plan**


1. Purpose
2. Target Group(s)
3. Strategies
4. Communication Tools
5. Evaluation

How will you determine if you achieved your purpose?



Etc.

Slide 27



**General Discussion**

Effective communication is a critical component of any planning process. Who are some of the groups that will have to be kept informed about your planning efforts?

I typically replace this discussion with an activity where they write a communication plan. For one board, you can lead a discussion by writing down **Who, What, Why and When** columns on a flipchart and getting them to tell you who needs to know what when. To get them started, ask what the staff needs to know (they need to know what you're doing early on) and what the public need to know (they need to know there is a plan when it is completed)

For multiple boards, get them to do this discussion amongst themselves, one discussion per board, and have them share their results.

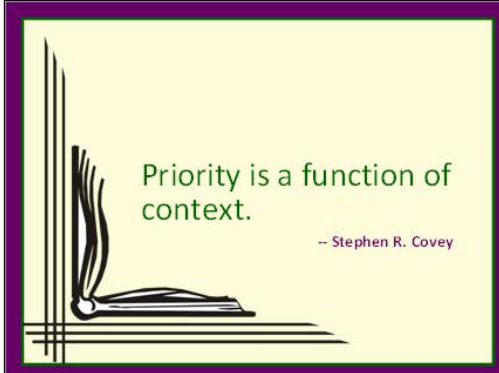
Slide 28

**Developing a Communication Plan**  
(handouts, page 7)

1. Purpose: What do you want to achieve?
2. Target Group(s): Who do you want to reach? Why?
3. Strategies:
  - What are the obstacles you may face?
4. Communication Tools: How will you deliver your message?
5. Evaluation: How will you know you achieved your objective?

Etc.

Slide 29



**Priority is a function of context.**  
-- Stephen R. Covey

**This slide introduces the section on selecting service priorities after determining community needs.**

Slide 30

**First Planning Committee Meeting**

1. Review municipal planning documents
2. Talk about what is important
3. Identify community needs
4. Select preliminary service responses



**This is what typically happens at the first CPC meeting. Tell them it is crucial they have a good facilitator to lead the meeting. Facilitators are available at no billed cost to nonprofit groups like libraries from Alberta Culture and Community Spirit, and they are excellent. Ask the Public Library Services Branch for details.**

Slide 31

**TO IDENTIFY COMMUNITY NEEDS,  
START WITH WHAT YOU HAVE**

**Municipal Planning Documents**

Municipal Development Plan  
Municipal Sustainability Plan

This is Alberta specific – every municipality should have produced these documents. They will sometimes be useful. You might also suggest they can partner with other groups like the municipality if needs assessment priorities are being done by them at the same time.

Slide 32

**Talk About What Is Important**

Students Will Graduate with Needed Skills

Local Business Will Succeed

People Will Find the Jobs They Want

We Will Have Safe and Adequate Roads and Bridges

Children Will Enter School Ready to Learn

Concept here is that these are COMMUNITY needs. The library isn't even being considered at this point. That is important, we don't want people thinking of the library at this point because they need to focus on community needs

Slide 33

**Talk About What Is Important**

APARTMENTS FOR RENT

People Will Have Affordable Housing

We Will Have Clean Air and Water


Everyone Will Feel Welcome

People Will Continue To Learn Throughout Their Lives

Children, Teens and Adults Will Have a Variety of Leisure Activities

Etc.

Slide 34

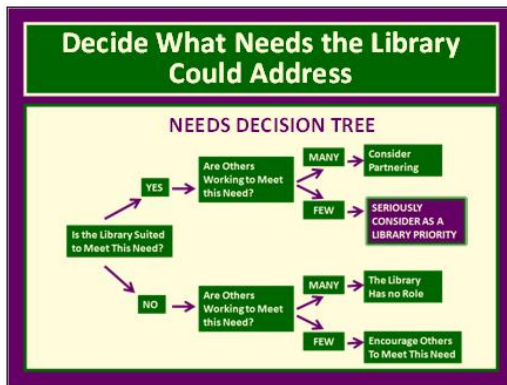


### Group Work

Identify the things that are important to people in your communities (handouts, page 8, Part I).


When you review the group results, correct them if they talk about the library rather than the community

Slide 35



This is how you shortlist the community needs the library will respond to. People tend to like this decision tree, it is an aha moment for them.

Slide 36



### Group Work

Which of the things your community values might be needs that the library could address as service priorities? (handouts, page 8, Part II, column A).

Now they shortlist the needs they identified earlier

**WHEN THIS IS DONE, THIS IS A GOOD TIME TO BREAK FOR LUNCH.**

Slide 37


**The Library Service Responses**

A Library Service Response is what a library does for, or offers to, the public in an effort to meet a set of well-defined community needs.

**When explaining service responses, I say they capture all the things that public libraries normally do**

Slide 38

**BE AN INFORMED CITIZEN**  
Local, National, and World Affairs




PLA Service Responses

**Comes from the idea that citizens should have a place where they can get the information they need to vote and otherwise carry out their civic responsibilities.**

Slide 39

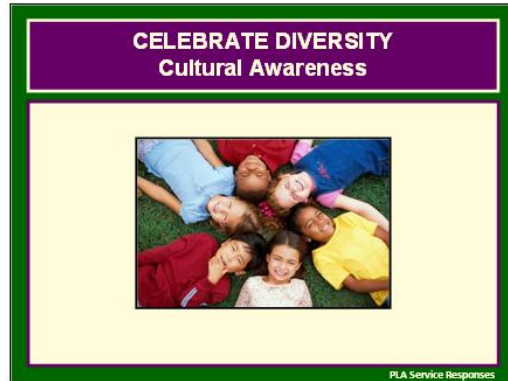
**BUILD SUCCESSFUL ENTERPRISES**  
Business and Non-Profit Support



PLA Service Responses

**Business librarianship, with service to nonprofits added.**

Slide 40



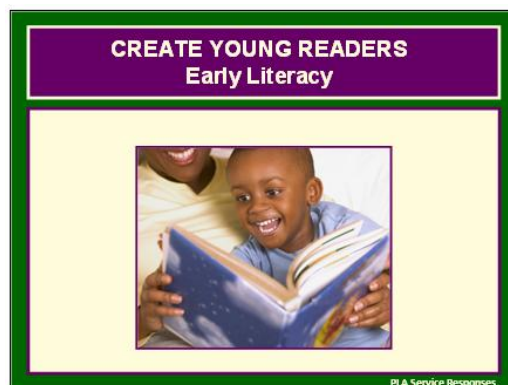
This is different from multicultural collections, this is about celebrating other cultures and ethnicities in the community. Originates in American race relations but is relevant in Canadian setting too (Canadian immigration model encourages multiculturalism).

Slide 41



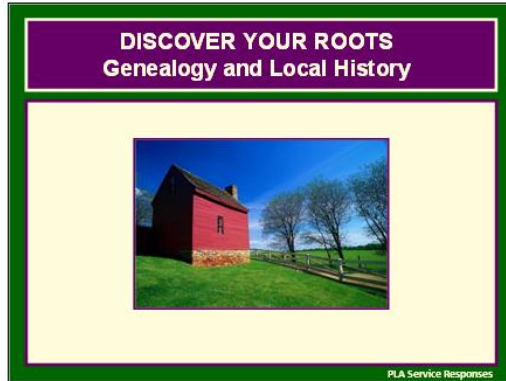
Relatively new service, very popular with patrons, maybe most relevant in non-affluent communities with less Internet at home.

Slide 42



Very strong traditional library service. Library is uniquely positioned to support pre-literacy (print awareness, role modeling of adults reading books, quiet behavior of groups, etc) that strongly influences later school success.

Slide 43



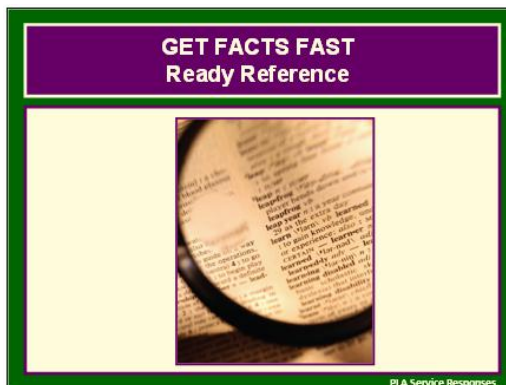
Local archives with regional documents, obituaries, etc, genealogy is one of the most popular uses for such collections

Slide 44



Comes from Web 2.0 idea of online communities creating and sharing their own content, applicable to non-Internet creation too.

Slide 45



Very traditional and core library service, perhaps less central now in age of Google and multiplying library roles

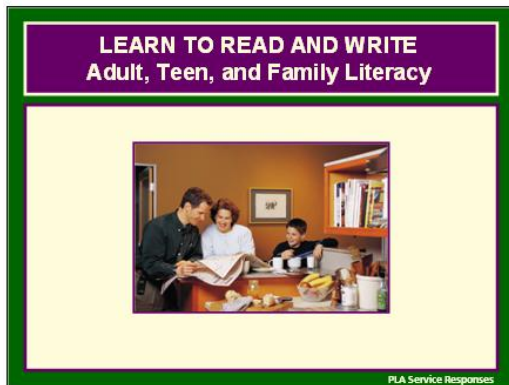


Slide 46



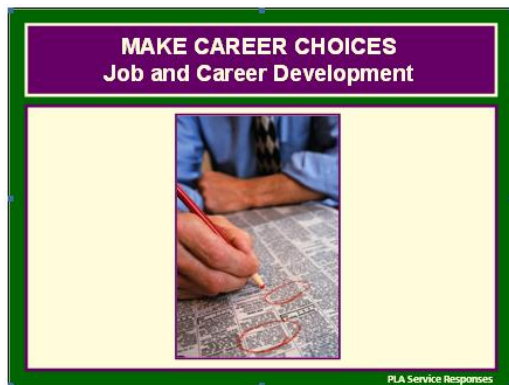
Library as community hub, source of information on local community services, referral service

Slide 47



Different than earlier literacy – this is about helping those who have fallen between the cracks in school system and perhaps also immigrants

Slide 48



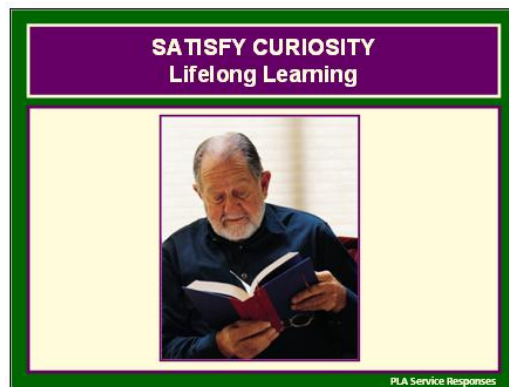
Resources and services that help people look for work and also develop work skills – job listings, resume production services, vocational study resources, etc.

Slide 49



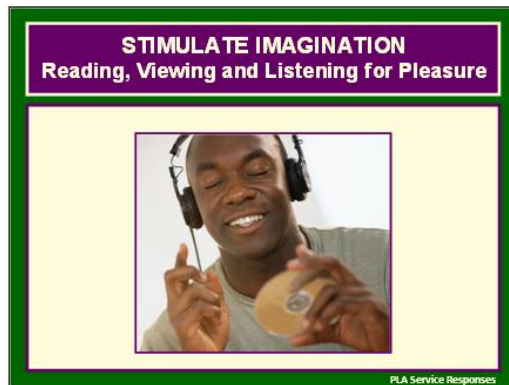
Information and services on health, financial and other serious important information people need to conduct their own affairs (compare with “be an informed citizen” which is more about civic responsibilities)

Slide 50



This is about personal development, learning for enjoyment – non-fiction collections support this (fiction too to some degree)


Slide 51



This is about personal entertainment. Movie, music and fiction collections support this. Note that it is perfectly valid for libraries to provide simple entertainment resources for patrons – and note these are typically the most heavily used library resources, very popular with patrons.

Slide 52

**SUCCEED IN SCHOOL**  
**Homework Help**




PLA Service Responses

Services to help students succeed in their studies. Can be k-12 or beyond.

Slide 53

**UNDERSTAND HOW TO FIND, EVALUATE, AND USE INFORMATION: Information Fluency**



PLA Service Responses

A newly popular service in libraries. People today do a lot of their own research from variable quality sources. Idea has been around for a long time in academic libraries.

Slide 54

**VISIT A COMFORTABLE PLACE**  
**Physical and Virtual Spaces**



PLA Service Responses

The “coffee shop library” idea – a library as an attractive physical place that is enjoyable to visit. Idea has been extended to websites and other virtual spaces.

Slide 55



Services to new immigrants are very relevant in the Alberta setting and several libraries here have chosen this as a service priority.

Slide 56

General Discussion

What do you think about the service responses?

Do they apply to your library?

Are they complete? Is anything missing?

I emphasize at the end of the services that they are not a takeout menu, that the library doesn't pick its favorites – responses that meet identified community needs are what gets selected.

Slide 57

Select Your Service Responses Based on Community Needs	
Community Need	Service Response
Students Will Graduate with Needed Skills 	SUCCEED IN SCHOOL 

These slides illustrate the idea that responses respond to community needs.

Slide 58

Select Your Service Responses Based on Community Needs	
Community Need	Service Response
People Will Find the Jobs They Want 	MAKE CAREER CHOICES 

Etc.

Slide 59

Select Your Service Responses Based on Community Needs	
Community Need	Service Response
Children, Teens and Adults Will Have a Variety of Leisure Activities 	STIMULATE IMAGINATION 

Etc

Slide 60

Select Your Service Responses Based on Community Needs	
Community Need	Service Response
Children Will Enter School Ready to Learn 	CREATE YOUNG READERS 

Etc

Slide 61

Select Your Service Responses Based on Community Needs	
Community Need	Service Response
People Will Continue To Learn Throughout Their Lives 	SATISFY CURIOSITY 

Animation: Click once to display the community need and again to display the service response.

Slide 62



The community planning committee and the library both work on selecting service responses. This really empowers the community, which is a bit scary but very powerful.

Slide 63

Selecting Service Responses	
1.	First meeting: Select preliminary service responses
2.	Review preliminary service responses and provide feedback
3.	Second meeting: Review feedback and make final recommendations
4.	Act on the committee's recommendations

The mechanics of the process – what happens at first meeting of the CPC, library response, second meeting, etc.


Slide 64

**This a Shared Responsibility**

Decide to Begin a Planning Process	January	February	March
Appoint Planning Committee	1 2	1 2 3 4 5 6	1 2 3 4 5 6
Staff Orientation	3 4 5 6 7 8 9	7 8 9 10 11 12 13	7 8 9 10 11 12 13
First Meeting: Recommend Preliminary Serv. Responses	14 15 16 17 18 19 20	14 15 16 17 18 19 20	14 15 16 17 18 19 20
Staff and Board Review of Committee Recommendations	21 22 23 24 25 26 27	21 22 23 24 25 26 27	21 22 23 24 25 26 27
Second Meeting: Make Final Recommendations	28 29 30 31	28	28 29 30 31
Board Acts on Committee Recommendations			
Staff Write Goals and Objectives			
	Action Planning and Implementation		

Shows the steps of selecting service responsibilities on the earlier calendar.

Slide 65

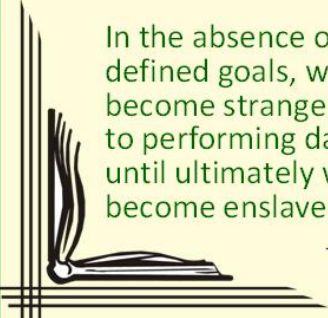


**Group Work**

Work with the members of your group to select service responses that would allow the library to meet the community needs you identified earlier (handouts, page 8, Part II, columns A and B).

Groups that formed earlier continue to work together on this new task.

Slide 66



In the absence of clearly defined goals, we become strangely loyal to performing daily trivia until ultimately we become enslaved by it.

-- Robert Heinlein

This quote introduces concept of goals

Slide 67

**Words Matter**

A **GOAL** describes the benefit your community (or a target population with your community) will receive because the library provides a specific service response.

The meaning of Goal as used in this process is defined here. Important to understand what we mean by goal in this setting. Note that goals and objectives are required by legislation in Alberta library plans. Note that a goal concerned more with the community benefit than the library.

Slide 68

Service Response	Satisfy Curiosity
Target Audience	Adults
Benefit	Explore topics of personal interest and continue to learn throughout their lives.

**THE GOAL**

Adults will explore topics of personal interest and continue to learn throughout their lives.

This slide shows how goals are written. A goal says what benefit a target audience will receive. Note that the service response at the top of the slide doesn't become part of the final goal.

Slide 69

Service Response	Stimulate Imagination
Target Audience	Teens
Benefit	Materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

**THE GOAL**

Teens will have materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

Another example



Slide 70


Service Response	Visit a Comfortable Place
Target Audience	Everyone
Benefit	Attractive, safe, and welcoming places to meet and interact with others or to sit quietly and read.

**THE GOAL**

Everyone will have attractive, safe, and welcoming places to meet and interact with others or to sit quietly and read.

Etc,

Slide 71

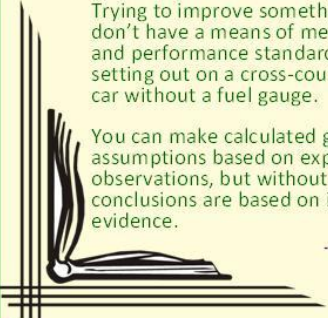


**Group Work**

1. Select two of the service responses you identified earlier (handouts page 8, Part II, column B).
2. Write at least one goal for two of the service responses you selected (handouts, page 12). The service responses are described on pages 9 and 10 of the handouts.

Continue with groups from before

Slide 72



Trying to improve something when you don't have a means of measurement and performance standards is like setting out on a cross-country trip in a car without a fuel gauge.

You can make calculated guesses and assumptions based on experience and observations, but without hard data, conclusions are based on insufficient evidence.

-- Mikel Harry

This quote introduces the concept of objectives

Slide 73

**Words Matter**


An **OBJECTIVE** describes the way the library will measure its progress toward reaching a goal.

The word **objective** as used in this process is defined. Note that objectives are library oriented (as opposed to goals, which are community oriented). Note that objectives need to be measurable, so progress can be evaluated.

Slide 74

**MEASURES FOR OBJECTIVES**

1. Number of People Served
2. How Well the Service Meets the Needs of the People Served
3. Total Units of Service Provided by the Library
4. Outcome Measurement



There are different kind of measures. Input measurements e.g. number of books purchased, output measures e.g. number of books circulated, and outcome measurements e.g. number of books read. Outcome are best but hardest to measure. Output measurements are pretty good and easier to measure.

Slide 75

Teens will have materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

Measure	% of teens who say the collection is really good or great
Target	At least 75%
Date	Each year

**THE OBJECTIVE**

Each year, at least 75% of teens will say that the library collection is really good or great.

How objectives are written.

Slide 76

Teens will have materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

Measure	Circulation of teen materials
Target	Increase from X to Y
Date	By FY 2012/13

**THE OBJECTIVE**

By FY 2012/13, the circulation of teen materials will increase from X to Y.

Another example

Slide 77

Teens will have materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

Measure	Number of teens who attend library programs
Target	At least X
Date	Each year

**THE OBJECTIVE**

Each year, at least X teens will attend library programs.

Another example

Slide 78

Teens will have materials and programs that respond to their current interests and provide pleasurable reading, viewing, and listening experiences.

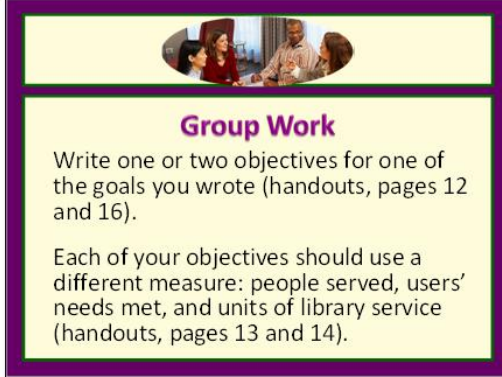
Measure	Number of teens who attend library programs
Target	At least X
Date	Each year


**THE OBJECTIVE**

At least X teens will attend library programs each year.

Another example

Slide 79





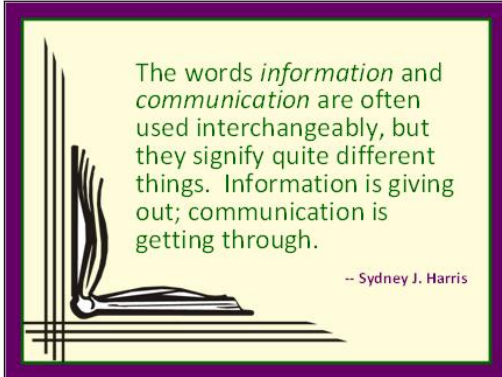
### Group Work

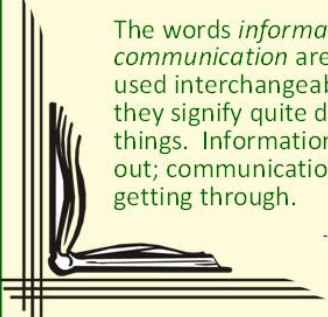
Write one or two objectives for one of the goals you wrote (handouts, pages 12 and 16).

Each of your objectives should use a different measure: people served, users' needs met, and units of library service (handouts, pages 13 and 14).

Continue with earlier groups

Slide 80






The words *information* and *communication* are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through.

-- Sydney J. Harris

This quote introduces the section on writing the final plan

Slide 81

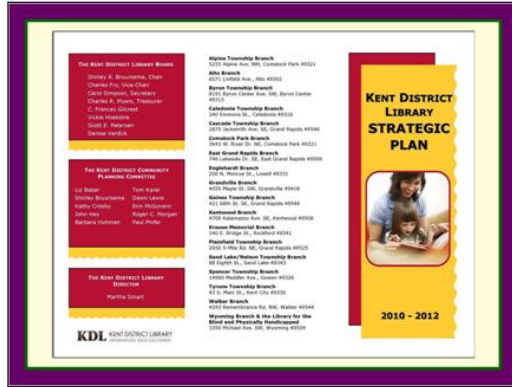


### An Effective Plan Is:

- Clear → Easy to understand
- Concise → Short and to the point
- Credible → Accurate and believable
- Logical → Orderly and documented
- Persuasive → Convincing and motivating

What makes up a good plan. One thing to mention: the goals and objectives are the heart of the plan. The plan should also include a description of the needs assessment process, in this case the activities of the CPC. The plan can also include the selected service responses, a short history of the library, an explanation of the process, etc. It should have a date range in the title and dates on the objectives and the plan should be approved by the Board.

Slide 82



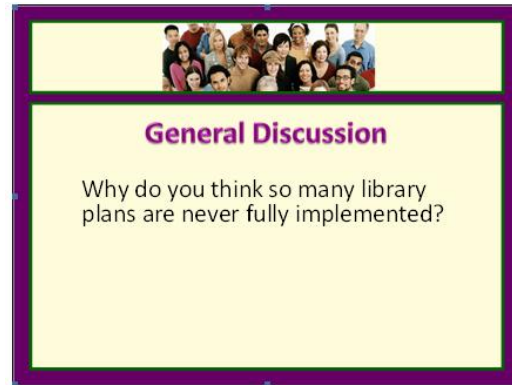
Here is an example of a simple, powerful version of a plan. Spruce Grove Alberta did a version of their plan like this. This is a powerful tool to show people what you are doing, and also to explain why you are not doing things that aren't your focus.

Slide 83



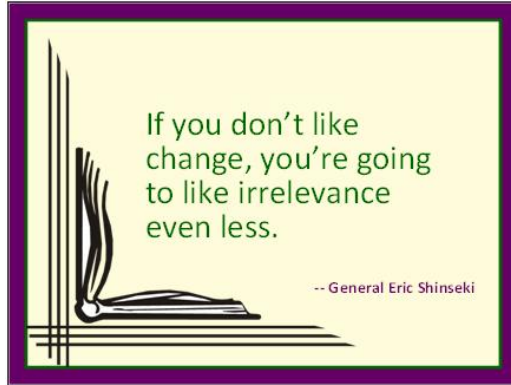
The other side of the pamphlet shown above (this is a trifold pamphlet).

Slide 84



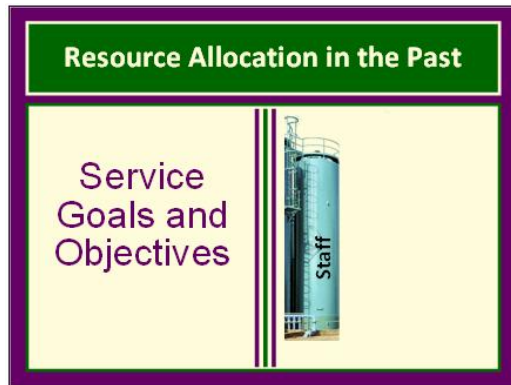
Try to get them enthusiastic about actually implementing their plan.

Slide 85



This quote introduces the conclusion. The quote is chosen to show that libraries have to grow and evolve or they might not survive.

Slide 86



Traditionally, libraries had silos- staff, resources, etc. – that existed totally separate from plans, goals and objectives.

Slide 87



In the new model, the plan should drive decisions on how to allocate resources.

Slide 88

**Alberta Public Libraries  
Are Vital to Many**

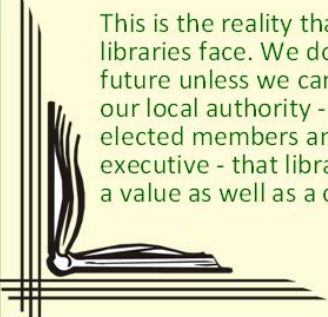
There are 310 public library service points across Alberta.

Alberta residents visit their public libraries an average of 5.2 time a year, almost twice the Canadian average.

Alberta public libraries circulate over 10 items per person annually.

Inspiring statistics about Alberta public libraries.

Slide 89



This is the reality that public libraries face. We don't have a future unless we can convince our local authority - the elected members and the chief executive - that libraries have a value as well as a cost.

-- Carl Clayton

This quote introduces the conclusion.

Slide 90



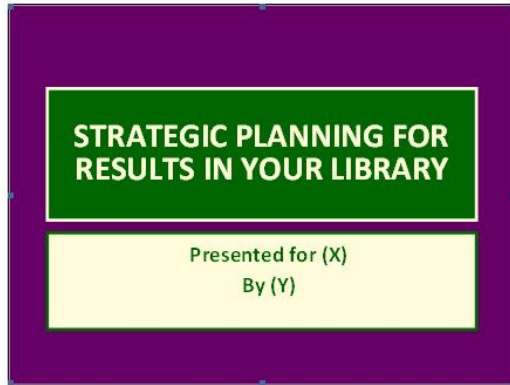
Tomorrow belongs to the people who plan for it today. -- African proverb

We owe it to our community to provide the services that they need now and will need in the future.



Inspirational words to close on.

Slide 91



**STRATEGIC PLANNING FOR  
RESULTS IN YOUR LIBRARY**

Presented for (X)  
By (Y)

**Final slide – don't forget to put your name and the audience's name on!!**