

# Engaging Your Board, Staff, and Community in Strategic Planning

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# What We're Talking About Today



Source: [schulzmuseum.org](http://schulzmuseum.org)

- How can the board be involved in strategic planning?
- How do we hear from our community?
- What is the staff's role?

# About Us



## **John Keister**

- Owner of executive search firm John Keister & Associates
- Has advocated for libraries on local, state, and national levels
- Has extensive experience as an elected public library trustee, board president, and library system board member



## **Sarah Keister Armstrong**

- Owner of Sarah Keister Armstrong & Associates, specializing in strategic planning and community needs assessments
- Has experience as an elected public library trustee, library system board member, and state library association board member

# Why does our library need a strategic plan?

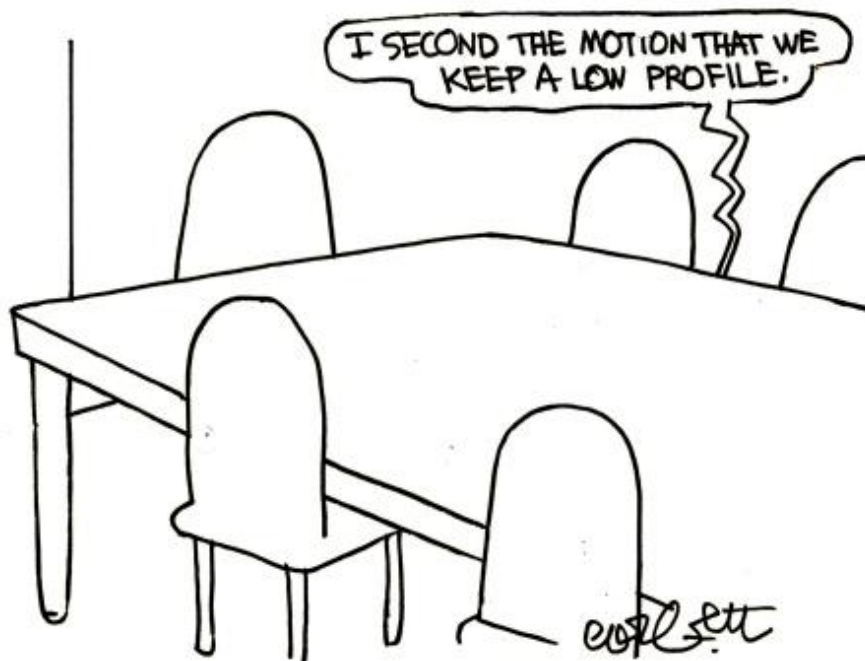


Can't library staff just create the plan themselves?

“The library is the worst group of people ever assembled in history. They're mean, conniving, rude, and extremely well-read, which makes them dangerous.”

-Leslie Knope, *Parks and Recreation*

How do we encourage our board to be interested in the future of the library?



# Let's talk about the board.

## Trustees:

- Are volunteers from the community
- Have different ideas about how the library should serve the public
- May not fully understand library operations
- May be connected to the community in ways library staff are not

# Before You Start the Planning Process: The Board's Role

- Be knowledgeable about the library
- Be involved in the library community
- Read library industry publications
- Invite staff members to present at board meetings
- Get to know your fellow trustees and library staff members
- Elect a strong board president



# Community Input: How Do We Get It?

Many options include:

- Surveys
- Focus groups
- Stakeholder interviews
- Informal conversations

Be creative!

# The Ins and Outs of Community Surveys

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"If you take a moment to complete the survey at the bottom, you'll be the first."

# What kinds of data can inform your survey questions?

- Library usage data
- Demographics
- Longitudinal trends
- User anecdotes
- Consideration of changes you would like to see as part of a new strategic plan

# Before You Send Your Survey



- How will the survey be disseminated?
- Determine your goals of the survey before writing any questions
- Make the survey accessible to everyone

# Survey Tips to Maximize Value

- Make sure the words you use are straightforward
- Avoid loaded questions
- Use a variety of types of questions
- Ask open-ended questions
- Placing survey questions in a logical order

# Mistakes to Avoid When Planning



- Having preconceived ideas
- Not valuing negative feedback
- Creating a plan that won't be used

# Is this a good time to revisit our mission statement?

**YES!**

- Why does your library exist?
- Use community feedback to define the role and purpose of your library

# How can Friends groups and library foundations be involved?

- Friends and foundation members are volunteers and members of the community
- Ask for their perspectives
- Conduct a focus group



# What role does the **staff** play once the strategic plan is written?

- Analyze data pertaining to library usage
- Continue to provide feedback on strengths and weaknesses of the library
- Review and learn from community feedback
- Help determine actions and timeline for implementing the new strategic plan

# What role does the **board** play once the strategic plan is written?



Source: TwoSheds

- Support staff implementation of strategic plan goals
- Be an active library user
- Promote the library within your networks
- Be an advocate for the library

# Being a Passionate Library Advocate

A new strategic plan is a great reason to reignite your board's and staff's energy!

- Participate in your statewide library community
- Interact with the library on social media
- Be informed about issues affecting libraries in your state
- Community events: start with something easy

# Questions? Connect with us!

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