

DIY Strategic Planning

MLA Conference 2024



Plymouth District Library (Plymouth, MI)

What is a strategic plan?

A strategic plan is a **formal document** that outlines an organization's **long-term goals** and the **strategies** to achieve them.

The plan serves as a roadmap to **guide decision-making** and **ensure alignment among stakeholders**, ultimately aiming to enhance the organization's effectiveness and adaptability in a changing environment.

Why it's important

Gives your organization focus so that you can set actionable goals to work towards.

Engages your community and allows your library to work towards shared goals that will be relevant to your community.

Tells your story. The “why” of what your doing in your community and the strides you've made.

Overview of the process

Develop and implement a research plan

- Situation and stakeholder analysis can guide you in developing a community research plan

Analyse the data and pull trends out of your research

Using the data trends develop your strategic plan

Report back to your community and stakeholders your progress.

Situational Analysis

SWOT Analysis

- Strengths: Internal advantages
- Weaknesses: Internal challenges
- Opportunities: External possibilities for growth
- Threats: External risks and challenges

Market Analysis

Overview of industry trends, target audience, and competitive landscape

Stakeholder Analysis

What voices in your community must play a role in how you plan for the future?

For each stakeholder, consider:

- Who do they work with?
- What special strengths, knowledge, or expertise do they have to share?
- How do they prefer to learn or interact?
- Who are their influencers?

With these things in mind, what research method makes the most sense for trying to interact with this group?

Community Research

What do you want to know?

- What people DO (behaviors)
- What people SAY (attitudes)
- How much/how many (quantitative)
- Why & how (qualitative)

Different methods will help you understand these in different ways

Research Techniques

Focus Groups: Facilitated discussion for 3-12 participants about a predetermined set of topics, primarily open-ended questions

Interviews: Facilitated 1-on-1 discussion on a predetermined topic, primarily open-ended questions

Surveys: Measures attitudes of large numbers of participants, primarily through closed-ended questions

Customer Research: Quick, single question surveys embedded into the library

Field Studies: Researcher observes stakeholders in library, taking note of key trends, important ideas, or concerns

Diary Studies: Participants are given a worksheet or camera and asked to describe relevant aspects of their interactions with the library, researchers pull out key findings/ideas afterward

Participatory Design: Participants are given creative materials to design their ideal library or learning experience in a concrete way that expresses what matters most to them and why

What could this look like in practice?

What we've done for a few cycles

Example Research Plan

Market Analysis: Make a point throughout the year to pay attention to other local libraries near you and note any trends you see emerging. Ask staff for input on what trends they see. Review ALA and MLA resources on library trends to get you started. Ask some of your librarians to put together a demographics analysis.

Situational Analysis: Set up a collaborative Google Doc for coworkers to contribute to a SWOT analysis of your library.

Stakeholder Analysis: Look to your community partners and your service organizations. Ask staff and public where they connect with the community.

Community Research: Facilitate a public focus group in-person, create an online survey to gather more information, print out bookmarks with a single question and put them in all your holds

Analyzing Your Research

Look at your data and pull out common themes. Below are some tools you can use for this:

- Get some help from AI
- Card sorting/affinity mapping
- Group Brainstorming

Structuring Your Plan

Mission: Core purpose and values of the organization

Vision: Long-term aspirations and desired future state

Values: Key principles that guide your organizational culture

Goals: long-term outcomes of your efforts over time

Objectives: Specific, measurable projects that move you closer toward your goal

Reporting Back

Quarterly Board Reports

Annual Reports

Community Presentations

Sharing your Story - Put your analysis and strategic plan on your website

Resources

ALA Trend Cards: <https://www.ala.org/future/engage/TrendCards>

A Guide To Using User Experience Research Methods:

https://media.nngroup.com/media/articles/attachments/User_Research_Methods_Letter-compressed.pdf

Harwood Institute Ask Tool: <https://theharwoodinstitute.org/libraries>

Conducting Focus Groups:

<https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main>