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Strategic Planning

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Situational Analysis

Before trying to set new directions for the future, it's crucial to establish a clear picture of the library's present situation within the community. A Situational Analysis pulls together information from various sources that provides a body of evidence to inform the development of the new Strategic Plan. Think of it as the research phase needed to support the work to come; consider any and all information sourced directly from primary stakeholders and the wider sector. This will include firsthand and internal knowledge, industry trends, local priorities, demographic patterns, knowledge of competitors and threats, and community interests.

A situational analysis summarizes your library's current reality by:

- Profiling the library's current programs and services

- Gathering feedback from current library users

- Profiling the community served by the library, including demographics, lifestyle patterns, changing trends, local issues, groups and agencies

- Checking for alignment with Municipal, County, or Band Council

- Scanning the environment and identifying any external forces that influence or have the potential to influence the library (eg. social, economic, technological trends, advances and shifts in public library service)

Accomplishing the situational analysis is most often done through Environmental Scanning and Gathering Community Input.

Environmental Scanning

Environmental Scanning is a crucial addition to any planning project and considers information related to, but not limited to, the following:

- Community demographic analysis
- Library partners
- Competitors
- Local planning and priorities
- Local organizations

With a baseline set of information about the community's current reality, a SWOT/PEST analysis allows the steering committee to compare that reality with where the library is doing well or can improve its service. An acronym for Strengths, Weaknesses, Opportunities, and Threats, a SWOT analysis provides an objective view of where the gaps may be and where opportunities for development exist.

A **SWOT** analysis looks at internal and external issues that influence the library. It provides an objective view of where the gaps may be where may opportunities for development exist.

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Stronger libraries. Stronger communities.

SWOT ANALYSIS TEMPLATE (examples)

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
• Library's reputation in the community • Library's unique services, resources, contributions • What does your library do exceptionally well? • What would patrons say are the library's strengths? • Advantages of the library's position within the community	• What could your library be doing better? • What sorts of complaints or criticism does your library receive? • What do you know or need to know about non-users? • Where is your library most vulnerable?	• What has your library wanted to do but hasn't been able to yet? • Are there emerging trends to pursue? • What ideas have you seen from other libraries that would fit well in yours? • How is your community changing and what needs will that bring?	• Which weaknesses make your library most vulnerable? • What roadblocks exist to impede progress? • Who is your competition and why? • What changes in the community are going to impact your library and how?
realistic and contextual	**honest and constructive**	**open-minded and innovative**	**short term and long term**

A **PEST** analysis helps to further explore those external opportunities and threats that may impact the library. It provides an objective view of external forces exist that the library may not have any control over but should still be aware of.

Further Resources

- Evaluate your strengths, weaknesses, opportunities, and threats - BDC
- Are you doing the swot analysis backwards? - Harvard Business Review
- PESTEL Guide - Toronto Metropolitan University

- 📄 Printable SWOT Analysis Template

- 📄 Printable PEST Analysis Template

Gathering Community Input

Before trying to set directions for the future, it's crucial to establish a clear picture of the present situation. A full understanding and analysis of the community uncovers what the community needs, what they want, and what they aspire to be. The upcoming development of the Strategic Plan will outline how the library plans to meet the need, fulfill the want, and anticipate the aspirations.

Initial analysis is completed through the Environmental Scanning but also through the Gathering of Community Input, both directly and indirectly. An internal profile of library data (through ILS reports, program evaluations, annual survey data, customer comments, etc) provides an overview on library usage and community input based on patterns. Consider what existing library data can convey in comparison to the information collected through the Environmental Scanning (such as usage trends, peek service hours, feedback through customer comments, program evaluations to identify priority interests, etc).

Direct community input is most often collected through the use of surveys and/or focus groups:

Surveys - an effective community survey involves a carefully crafted and comprehensive set of questions with a focus on service, collections, facilities, and relevant demographics. More importantly though, surveys allow for the sharing of opinions and perspectives regarding library practices and directions and how they align with individual priorities. A typical survey will be made up of 12-15 questions that hold direct value to the organization's big picture future.

Focus Groups - focus groups gather data to fill in the gaps from the Environmental Scanning and Survey that is centered around the feelings, sentiments, and ideas towards the public library or community at large. This technique centralizes lived experience and storytelling; it allows users and non-users to share their opinions and perspectives in their own words.

Further Resources

- Library User Survey Templates & How-Tos - Library Research Service
- How To Create Surveys That Generate Useful Data - Massachusetts Library System
- Focus Group Insights: The User Experience - Library Journal

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