



Strategic Planning for Public Libraries

Stronger libraries. Stronger communities.

Definition

Process of determining an organization's values and future goals, and then identifying the best approach for achieving those goals.

Defining Why We Need Strategic Planning

- Define the library to the public
- Clarify the library's future direction
- Solve any organizational challenges

Strategic Planning is NOT...

A Static Plan | A Dust Collector | A Master Plan



A Strategic Planning Framework for Public Libraries



Strategic Planning and Leadership in the Public Library

What is Strategic Planning?

- A framework for implementing decisions with proper allocation of resources and a way to measure success.
- Influence on organizational culture - an understanding of why work is being done.
- Cause-driven process: what are you creating through your vision statement and values?
- Flexibility is key: priorities change; economics shift; politics get in the way.

Making the Plan Work

Operationalizing the Plan

- Action Plans
- Individual Staff Work Plans
- Connecting everyone's work and role to the strategic plan
- Performance measures
- Developing the library's "data story"

Common Pitfalls

- Reactive planning instead of proactive and intentional planning
- Inability to see the library as it really is (or perceived to be by the community)
- “Set it and forget it” mentality



Top 5 Tips

1. Plan with intention, not reaction (be proactive!)
2. Dedicate time and resources to the planning
3. Balance between philosophy and practical elements
4. Reach without setting impossible goals
5. Keep it alive and track progress

BONUS: Keep it flexible and adapt as needed

Further Support / Resources



[Ontario Library Service](#) / [Professional Resources Home](#) / [Strategic Planning](#) / [Strategic Planning Overview](#)

Strategic Planning

Search Words | terme: Search | Rechercher

Strategic Planning Overview

[Introduction to Strategic Planning](#)

[The OLS Process](#)

[Further Resources](#)

Getting Started

Situational Analysis

Mission/Vision/Values

Strategic Priorities / Goals / Objectives

Drafting the Plan

Communication and Marketing

Operationalizing the Plan

Sample Strategic Plans

Introduction to Strategic Planning

Strategic Plans are living documents that guide the direction of the organization; and are typically conducted every 3 to 5 years. As an essential tool for publicly-funded organizations like a public library, the planning process helps ensure that library decisions are using resources appropriately and have a clear set of goals to be working towards. Strategic Plans seek to ensure that the library's efforts and resources are aligned purposefully to increase the likelihood of the library successfully achieving what it sets out to accomplish.

Strategic planning offers an opportunity to consider how library plans align with municipal, county, or Band Council priorities. In Ontario, most public libraries receive about 90% of their operating budget from local government. Are there opportunities for greater municipal, county, or Band Council partnerships or areas of cooperation? How can the library and the municipality, county, or Band Council work together to meet the needs of residents?

Further, strategic planning is a collective and big picture effort between the Library Board and staff that clarifies the library's future direction and ensures operational activities serve strategic and long-term goals. The most effective strategic plans have input and buy-in from all levels of the organization, thus positioning the plan to be a valuable tool at governance, management, and operational levels throughout its lifespan.

This guide outlines the Ontario Library Service (OLS) approach to strategic planning, including examples, resources, and other materials to jump start your library's next Strategic Plan.

The OLS Process

The Ontario Library Service (OLS) strategic planning process follows a progressive workflow (pictured below) and can be approached in different ways to suit the needs of your library:

Full Facilitation - An OLS Consultant guides the steering committee through the entire process with customized modules for each section, resources, and live group sessions for discussion and collaborative work.

Partial Facilitation - An OLS Consultant provides customized and focused facilitation for requested areas of the planning process.

Self-Guided - Libraries preferring to self-guide through the strategic planning process may choose to download the full guide developed by the former Southern Ontario Library Service and provided below under "Further Resources".

A customized service fee may apply based upon the standard [OLS fee structure](#). Please contact the [OLS Consulting Team](#) to inquire. Les services ci-dessus sont offerts en français, selon vos besoins.

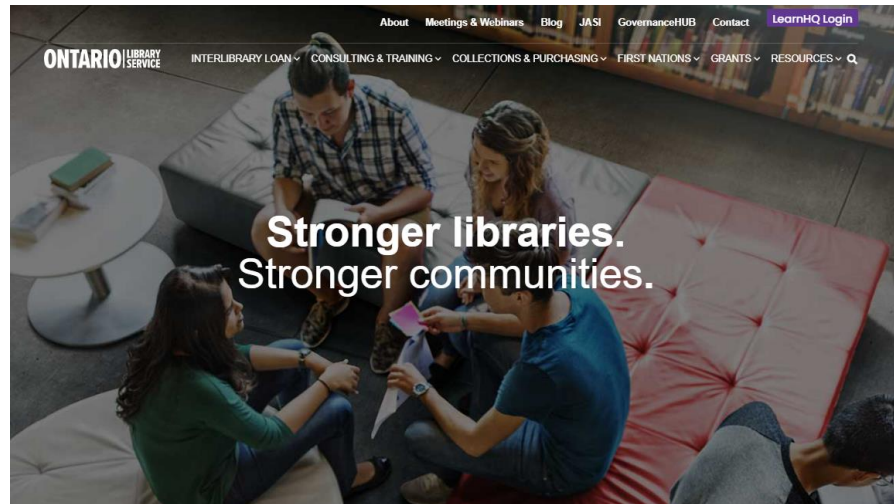
- [OLS Professional Resources](#)
- [Learn HQ Courses](#)



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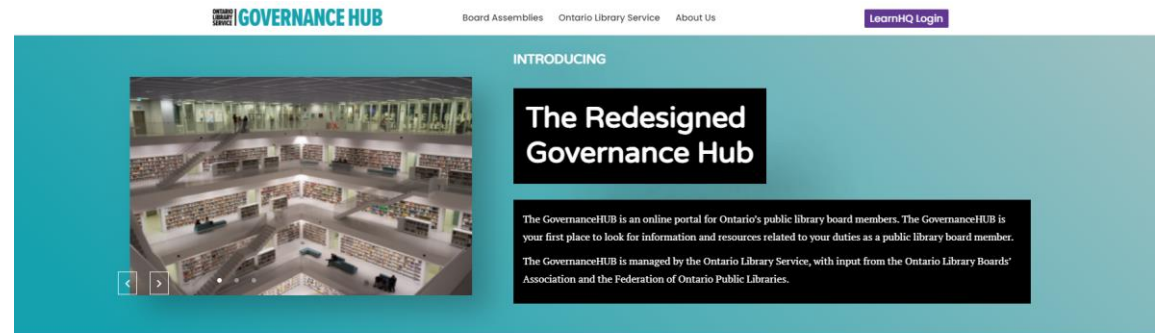
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The Four Year Board Cycle



10 Things to Know



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Frequently Asked Questions



About the Governance Hub

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Questions?

consulting@olservice.ca

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