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# Quick Guide to Strategic Planning

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Be a strategic planner! It doesn't have to be complicated or intimidating. You can do it no matter the size of your staff or the amount of time you have. Think of your strategic plan as a road map for 2-3 years to keep your efforts organized and focused on specific goals.

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## FIRST THINGS FIRST

Completed?  
Check it off!

- Put together a planning committee.**  
It should consist of at least two trustees, the library director and two staff members if possible. Keep in mind Sunshine Laws if you'd like more trustees on the committee.
- Hone your mission.**  
Your mission statement is your "why." Already have one? Great. Analyze it for improvements. Don't have one? Now's the time!
- Clarify your vision.**  
Your vision should reflect where you want the library to go. What are your hopes and dreams?
- Determine your values.**  
Your values are the core principles that guide how you work together and with your community. What does your library believe in?



### STRATEGIC PLAN JUMP START

Consider using our Strategic Plan Jump Start Worksheet! It makes a great first committee meeting activity. [Contact your Colleague on Call](#) for the worksheet and for personalized support for your process.



## TIPS FOR FACILITATING FOCUS GROUPS

- Limit each group to 6-8 participants and one hour.
- In-person groups are best.
- Ask open-ended questions.
- Seek participants who are actively involved.
- Keep the conversation focused.
- Strive to be objective and leave the discussion to the participants.
- Visit [LRS.org](https://www.lrs.org) for expertise on focus groups.

## 2

### GATHER INTERNAL INFO

- Host a staff focus group.**  
As objectively as possible, gather feedback from staff about challenges and opportunities.
- Meet with trustees.**  
As objectively as possible, gather feedback from trustees about challenges and opportunities. Ask open-ended questions. (Remember Sunshine Laws here, too.)
- Create report of library statistics.**  
Create a one-page report of library statistics such as circulation data, program attendance and other service usage. It is helpful to see recent numbers as well as data over the past few years to see trends.

### GATHER EXTERNAL INFO

- Send out a survey.**  
Create a simple community survey. For accessibility, use print and digital surveys, as well as translations into additional languages if applicable. Check out [LRS.org](https://www.lrs.org) for sample surveys and guidance.
- Host community focus groups.**  
As objectively as possible, gather feedback from community members about challenges and opportunities. Coordinate special sessions for specific groups such as businesses, government officials and teachers.
- Create a report of community data.**  
Create a one-page report of community demographics including age, race, income and education attainment. It is helpful to see recent numbers as well as data over the past few years to see trends. Explore the Colorado State Demography Office's website for data: [demography.dola.colorado.gov](https://demography.dola.colorado.gov).

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### PUT IT TOGETHER.

- Complete a group SWOT analysis.**  
Using the information gathered in Step 2, brainstorm the library's strengths, weaknesses, opportunities and threats.
- Narrow your goals.**  
Write down four to five SMART goals based on what you've learned as a group.
- Develop objectives and measurements.**  
Develop realistic objectives that can be completed in a set time frame, preferably two to three years. Then, determine how you will measure their success.

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### WE HAVE GOALS. NOW WHAT?

- Write up the plan.**  
It should start with a list of committee members, and the library's mission, vision and values. Then write the goals with a list of objectives and measurements beneath each.
- Create a one-pager.**  
Use this to advocate and communicate the plan to your community. It should include your mission, vision and goals. No need for the details on objectives. Keep it simple and easy to digest.
- Track your progress and be responsive.**  
Meet quarterly as a committee or add a standing item to the monthly board agenda to review the plan's progress. The document should be dynamic and respond to changes in the community.

### WHAT IS A

**S**

Specific: What will be accomplished? Who is responsible?

**M**

Measurable: What data will you use to measure success?

**A**

Achievable: Is the goal doable? Do you have the skills and resources?

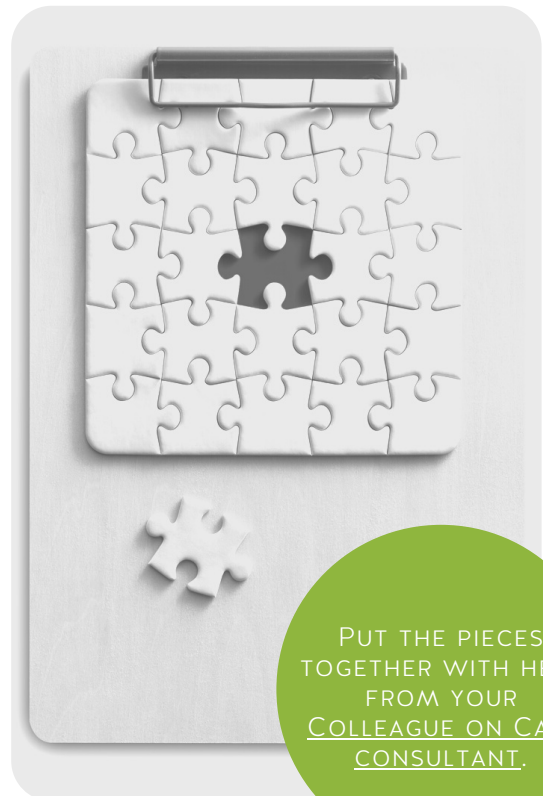
**R**

Relevant: How does the goal align with broader goals?

**T**

Time-bound: What is the time frame for accomplishing the goal?

### GOAL?



PUT THE PIECES TOGETHER WITH HELP FROM YOUR COLLEAGUE ON CALL CONSULTANT.