

#2: LONG-RANGE PLAN

Each . . . library has a board-approved, written long-range plan of service;

WHY IS A LONG-RANGE PLAN IMPORTANT FOR EVERY LIBRARY?

Every library needs a long-range plan as a formal document to:

- Provide information about the community and library to use in decision-making;
- Clarify for board, staff and community the role of the library in the community;
- Evaluate the usefulness and quality of specific services and activities;
- Assist in preparing for change (dropping old services or adding new ones);
- Establish priorities for the allocation of resources;
- Document the need for (better) funding.

WHAT IS A LONG-RANGE PLAN? DOES IT DIFFER FROM A STRATEGIC PLAN?

A long-range plan and a strategic plan both involve *investigating* the library's services in light of community needs and resources, *evaluating* the strengths and weaknesses of the library and the services the trustees and staff believe the library should or can provide, and *creating* a structured plan for providing the resources and direction for the "right" services for that community. A "strategic management plan" may have more emphasis on an analysis of strengths, weaknesses, opportunities and threats (SWOT) and more detailed budget forecasts based on revenue projections.

WHAT IS THE PROCESS FOR LONG-RANGE PLANNING?

The way a library moves through its planning process is as important as the plan itself. The planning process helps raise the community's awareness of library programs, services and needs and gains library support from the community.

The long-range planning process is a cyclical one. While there are a variety of ways to develop a long-range plan, a successful planning process often includes the following steps:

- Gather information about, and analyze the "environment" inside and outside the library. Such information may include:
 - External Environment:
 - Economic factors
 - Community demographics
 - Political factors

- Needs of the community
- Internal Library Environment:
 - Current budget
 - Current staffing
 - Administrative issues
 - Current technology
- Develop a vision statement that describes what the library will "look" like in the future. (A vision statement can encompass a given time period like five to ten years, or be an ideal without reference to time period.)
- Decide on the goals that will move the library towards its vision.
- Decide on objectives for those goals. Make sure each objective is
 - measurable; and
 - realistic
- Identify specific action steps that will be needed to meet the objectives. Be sure these activities can be achieved in the defined periods.
- Develop a process for evaluating whether or not the library is reaching its objectives.
- Have the Board of Trustees formally adopt the plan.
- Evaluate how well the plan is working

And then begin again with a new examination of the environment, inside and outside the library, etc.

WHO PARTICIPATES IN THE PROCESS?

Many people should be involved in the planning process in addition to the library director and the board of trustees. These may include: one or two key staff members; library users, and representatives of business, education, government, or other key community groups. (*Tip: One way of involving the community is through the information-gathering stage of the plan. For example, use focus groups of community members, or community surveys that ask people to identify ways the library can meet community needs.*)

Public library system consultants or, in larger libraries, consultants under contract, may also advise or otherwise assist with the process.

WHAT ARE THE ELEMENTS OF A BASIC LONG-RANGE PLAN?

- Vision statement for the library
- Mission statement and selection of library service role(s)
- Goals related to the mission and role(s)
- Measurable objectives which will help achieve the goals

- Specific action steps which include:
 - Timetable for completion
 - Individuals responsible for each activity
- A basic budgetary process for identifying and securing adequate funds
- A process for evaluating success
- A process and timetable for regular review and revision
- Identification of the planning committee

HOW MANY YEARS SHOULD A LONG-RANGE PLAN COVER?

Typical plans are for 3 to 5 years. Although most libraries will want to use a long-range plan to set direction for an extended period, they will probably limit detailed planning to a shorter period, perhaps two or three years. Although every library board should take into consideration continuous development for the library and the opportunities presented by the electronic information environment, they should set objectives and plan activities which, with a reasonable amount of effort, the library and community can achieve in the identified time period.

HOW DO WE USE THE PLAN?

Often, long-range plans are used to develop a yearly "Action Plan" which is an outgrowth of the direction and choices made in the longer range plan. Persons with responsibility for tasks within the plan work on these assignments according to the timeline in the plan. Staff and trustees review the entire plan for action and accomplishments according to the a schedule provided in the plan. Many institutions use a "rolling" process in which one year is "added" or revised when the current year is completed (or nearly completed).

WHERE CAN I GO FOR HELP?

Consult your library system for examples of different types of plans, as well as other assistance you may need. It would also be helpful for you to submit a copy of your plan to your system so it can be shared with others.