



Strategic Plan Development, Consulting and Facilitation Services

Note: These are just examples of different processes we can do to help your library develop a strategic plan. We will work with you to find out what are the right steps for you and your library to best develop a plan and meet your budget.

Phase 1 – Planning Assessment & Data Gathering

- *General services and community assessment*
 - We typically suggest a library form a planning committee for this process. With this committee, we use an issues and needs questionnaire to learn about the library and community.
- *DPI Annual Report Data Comparison*
 - Using data and information provided to DPI in annual library reports, WiLS will do a comparison with other libraries with comparable population and revenues to assess service results, costs and trends.
- *Circulation and Lending Data Comparison*
 - With data gathering assistance from the library and library's regional library system, WiLS will use ILS material usage data to assess collection use and trends.
- *Demographic and Economic Data Assessment*
 - Using data and tools from American Fact Finder, WiLS will identify and assess relevant demographic and economic information in the library's community.
- *Visit library to review all of the above and assess building*
 - WiLS will tour the library in order to capture information about the layout of services and collections using a standardized process to reveal themes to explore during the planning process. WiLS will also meet with the planning team and/or key staff to review information gathered to date.

Phase 2 – Community Assessment

- *Community Survey*
 - WiLS will work with the library to administer a community survey to area residents. The survey will focus on the broader community and its perceptions of the library, in addition to specific service and usage questions. The library, with input from WiLS, will promote the survey to area residents through channels that will likely result in getting a high response rate. The survey WiLS has developed is a standardized survey we use with libraries for strategic planning. Request for customization will require discussion and may result in the need for an adjusted quote for this component.
- *Community Conversations*
 - WiLS, with assistance from the library, coordinates community conversations to gather information about how the library can align its resources and services to support the community reaching its aspirations and addressing its challenges. WiLS will work with the library to develop a protocol to identify and invite community conversation participants. WiLS will provide a facilitator to lead the conversations and document the input gathered during the conversations. WiLS will compile and theme the results of the conversations. The number of community conversations will be determined with the library based on discussions about key community and library stakeholders and groups.

Phase 3 – Strategic Plan Development

- *Data and Information Report*
 - WiLS presents a webinar to review the data and information summary report of all the information gathered for the process with the library planning team before the strategic plan development meeting.
- *Develop Foundational Elements of Strategic Plan*
 - If desired by the library, WiLS will coordinate a process and facilitate a half-day in-person meeting of participants as selected by the library planning team to develop a mission statement and core library values to serve as foundational cornerstones to guide the development of strategic directions, goals and initiatives.
- *Strategic Plan Development Meeting*
 - We develop processes and provide facilitation services for a half-day in-person strategic plan development meeting of the library planning team. The result of this meeting will be identifying strategic service goals for the library and initiatives that can be done to reach the goals to create a plan framework.
- *Writing the Strategic Plan Document*
 - WiLS compiles results of the planning meetings to include with other documentation during the course of the planning process report to develop and write a strategic plan document. We coordinate a schedule with the library to complete writing the plan. This schedule will include coordination for library feedback and input to create a final draft for presentation to the library board.

Phase 4 – Strategic Plan Prioritization, Implementation and Ongoing Planning

- *Implementation and Ongoing Planning Process Development*
 - Following the completion of the strategic plan WiLS will facilitate the development of a framework for an ongoing planning assessment, prioritization and implementation process that will be scheduled and coordinated on an annual basis to align with the library's budget planning calendar. WiLS will compile the results of session and prepare an ongoing process document for the library.