

Waukesha PL Strategic Planning Roles and Activities Timeline

Phase 1 – April & May

- Initial prep
 - *Library Strategic Planning Committee*: Become familiar with Dropbox folder in which documents will be supplied and you will share data and information with WiLS
 - *Library Strategic Planning Committee*: Complete issues and needs questionnaire
- DPI Annual Report Data Comparison
 - *Library Director*: Provide WiLS with up to five libraries for statistical comparison. May be based on library population service size, geographic location, or circulation.
 - *WiLS*: 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.
- Demographic and Economic Data Assessment
 - *WiLS*: Will identify and assess relevant demographic and economic information in the library's community using data and tools from American Fact Finder.
- SWOT analysis with a focus group of library staff (potential date May 16th)
 - *Library Director*: Will identify library staff to participate and schedule date, time and meeting room.
 - *WiLS*: Will facilitate the analysis with staff and document and theme information gathered during this process.
- Community conversation preparation
 - *Library Strategic Planning Committee & Library Director*:
 - Determine process plan for community conversation engagement.
 - Develop a community map of individuals and organizations that include key community and library stakeholders and groups.
- Community survey preparation
 - *Library Strategic Planning Committee & Library Director*:
 - Determine process plan for community survey
 - Review survey template and provide feedback through the director.
 - *WiLS*: Work with the library director to finalize survey questions.

Phase 2 – June & July

- Community Survey
 - *Library Strategic Planning Committee & Library Director*: With input from WiLS, promote the survey to while survey is open area residents through channels that will likely result in getting a high response rate.
 - *WiLS*: Will work with the library to administer a community survey to area residents and compile results when the survey closes.
- Community Conversation
 - Hold conversations and document the input gathered during the conversations.

Phase 3 – August & Early September

- Community Data and Information Report / Data and Information Report Review
 - *Library Strategic Planning Committee:* Attend and participate in a webinar, presented by WiLS, reviewing results of the two phases and to write the strategic plan document.
- Develop Foundational Elements of Strategic Plan
 - *Library Strategic Planning Committee:* Participate in 2-hour in-person meeting to develop a mission and vision statements and core library values to serve as foundational cornerstones to guide the development of strategic directions, goals and initiatives.
- Strategic Plan Development Meeting
 - *Library Strategic Planning Committee:* Attend and participate in a half-day in-person strategic plan development meeting.
- Implementation, Communication and Ongoing Planning Process Development
 - *Library Strategic Planning Committee:* Attend and participate in a half-day in-person to develop a framework for an ongoing planning assessment, prioritization, implementation and communication process that will be scheduled and coordinated on an annual basis to align with the library's budget planning calendar.

Phase 4 – September & October

- *Writing the Strategic Plan Document*
 - *WiLS:* Will compile the results of the planning meetings to include with other documentation, including, when relevant, the data and information gathered, assessed and summarized during the course of the planning process report, to develop and write a strategic plan document.
 - *Library Strategic Planning Committee:* Provide feedback on the initial and potentially subsequent drafts of the strategic planning document.