

STRATEGIC PLANNING REPORT

ANONYMIZED CLIENT SAMPLE

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Contents

Executive Summary.....	3
Work Summary & Methodology	Error! Bookmark not defined.
Overview of Library.....	Error! Bookmark not defined.
Definition and Purpose of a Strategic Plan	3
Components to Consider in a Strategic Plan	Error! Bookmark not defined.
Stewardship Planning.....	Error! Bookmark not defined.
Actions of the Stewardship Team	Error! Bookmark not defined.
Strategic Plan/Roadmap	3
Strategic Plan, 20##-20##	3
Discovery of Objectives During the Planning Process.....	Error! Bookmark not defined.
Objective 1	Error! Bookmark not defined.
Objective 2	Error! Bookmark not defined.
Objective 3	Error! Bookmark not defined.
Objective 4	Error! Bookmark not defined.
Next Steps	Error! Bookmark not defined.
Appendices.....	Error! Bookmark not defined.

Executive Summary

LYRASIS Strategic Planning Consultant, Katy Klettlinger, worked with the library to conduct a comprehensive review of library facilities, staff duties, and users' needs to determine objectives staff to strive for in its next strategic plan/roadmap. The consultant utilized library documentation, created and analyzed a survey for all staff, held individual meetings and interviews, and conducted staff and stakeholder focus groups to develop her recommendations.

Key findings of the review included:

- Most staff and constituents were unaware of the resources and services available to them.
- Users desire assistance on subject areas related to their work over learning research methods.
- [excluded bullet for sample]
- Library would best benefit users by uniting into one location to offer services.

Key recommendations listed as objectives in the library strategic plan are:

- **Rebrand and promote** to better serve users and set the stage for programming, staffing, and partnerships.
- Realign **collections** with the needs of those who serve the [excluded phrase for sample] community.
- Serve as the **central information resource** for users with content expertise and programming.
- Eliminate barriers to information by providing a **comfortable physical and virtual space** users.

Detailed findings, recommendations, and next steps are in the remainder of this report.

Definition and Purpose of a Strategic Plan

Strategic plans are guiding documents that help a library decide where to focus their attention over a set period to provide the best services possible. Objectives are determined by the information gathered to discover what is important to users as well as potential new services that can aid them in their development.

[excluded text for planning sample]

Strategic Plan/Roadmap

The objectives and activities outlined in this strategic plan are aimed to better serve the library and its user communities. All the objectives for the library's strategic plan and roadmap fall under one or more of the strategies identified in the organization. The goal of the libraries' planning process is to align library collections and services to match the organization's current and anticipated future needs.

Strategic Plan, 20##-20##

Objective 1: **Rebrand and promote** the libraries to better serve users and set the stage for programming, staffing, and partnerships. (*Organization Plan Strategies #1, #2, & #3*)

1. Unify the libraries as part of rebranding efforts.

Steps to Begin in Year One

- a. Work with administration and stakeholders to officially acknowledge library unification and attain needed resources for restructuring.
- b. Create a new vision and mission statement(s) that encompasses the collections held by the libraries under one umbrella.
- c. Revise marketing and other publicly available materials/resources to reflect the new structure.
- d. Announce new structure to staff, stakeholders, and users.

[remaining objectives excluded from sample]

Resources Needed:

Staff: Project management, policy creation, reference programming, human resources, marketing, & budgeting.

Collection: None.

Facility: None.

Technology: Platforms/tools for virtual reference & marketing materials.

Measures of Success:

- Continuing education for staff is attained to begin reference program work.
- Library staff inquiries increase by a determined percentage (to be established in conjunction with the [excluded job title for sample]) over the course of the next 3 years.

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Want to learn more? Contact our Subject Matter Experts.

Strategic Planning Services

Our subject matter experts have years of experience in data collecting, analysis, and methodologies needed to support the creation and stewardship of strategic plans. We can evaluate current library operations and community trends to discover user and non-user needs resulting in the creation of an impactful strategic plan.

Allow us to advise you on every component of your project, including data collection exercises, facilitation, and work culture assessments.



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- With LYRASIS since 2016
- Previously worked as an archivist, records manager, and state library consultant
- First library consultant to become certified in the Community Heart & Soul strategic planning method and serves as a liaison for libraries.
- Other areas of expertise include digitization, preservation, records management, and space planning