Types of Planning
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Our mission is to exceed the expectations of our customers, the taxpayers, by operating at the highest levels of accuracy, cost-effectiveness, and accountability in a customer-centered environment.

Tennessee State Library and Archives
Secretary of State Tre Hargett

July 8, 2015
Why Plan?

- To guide your library into the future
- To be proactive, rather than reactive
- To meet Standards for Tennessee non-metropolitan public libraries
Plans, Policies, Procedures, and Standards

- Standards — overarching goals
- Plans — ways to achieve set goals
- Policies — govern library operation
- Procedures — how the library internally enacts the above
Who’s Responsible?

TSLA/Region
- Creates Standards to guide Plans
- Can advise on any of the following

Library Board
- Writes Plans to guide library
- Develops and approves Policies

Director
- Can assist Board on Planning
- Recommends Policies to the Board
- Creates Procedures to follow the above

Library Staff
- Follows Director’s Procedures
- Can recommend Policies to Director
Types of Plans

- “Big Picture”
  - Mission/Vision Statements
  - Long-range/Strategic

- Specific Functions
  - Technology
  - Disaster and Emergency
Mission & Vision Statements

- **Mission**
  - Why you exist
  - Can guide decisions about priorities, actions, and responsibilities
  - Ex. “The library will ensure preservation and transmission of knowledge and provide the community with free and open access to information for education, recreation, and reference.”

- **Vision**
  - Desired end state
  - Can lead to achieving quality results
  - Ex. “The library will be a vital center of knowledge for all and will be a leader for the community.”
Long-range/Strategic Plans

- Sets the direction of the library
- Contains formulation and implementation of ideas
- Setting specific goals
- Measure and monitor progress
Elements of a Plan

- The “Why?”
- Goals/Objectives
- Expected Results
- Evaluation Methodology
Technology Plans

- Traditionally a three year plan
- Should be a group effort
  - Board
  - Director
  - Input by staff and IT support
Technology Plans

- Components
  - Optional Technology-specific vision statement
  - Goals and Objectives
  - Inventory of existing equipment
  - Staff development
  - Evaluation including methodology
Technology Plan – Vision Statement

- Technology-specific vision statement
  - Can use existing vision statement and adjust it for technology
  - Should reflect the library’s mission statement
  - Think big picture
    - If funds were no object, what would technology in the library be like?
    - What’s your ideal library?
    - What will be technology provide to the community and to the individual patron?
Sample Technology Vision Statement

The Avon Free Public Library will be the information hub for the community, utilizing current technologies and high speed Internet access to improve library services for the community including links to schools, Town agencies, businesses and organizations. The Library will be both a physical place as well as an information portal, where residents will be able to access the library 24 hours a day, 7 days a week, through its website and electronic resources. Library staff will be provided with continuous training and development opportunities so they may better serve the public.
Sample Technology Vision Statement

LIBRARY TECHNOLOGY VISION STATEMENT

- To promote technological literacy for the public as well as reading literacy.
- To provide technology resources to patrons who otherwise would not have access due to economic or societal reasons.
- To strive to be in the forefront of public libraries, exploring and providing the benefits of technology for all members of the Middletown community.
- To provide support to Library staff, enabling them to use technology efficiently and to better serve the public.
- To create an environment which actively and creatively incorporates technology as a tool in shaping the ways we fulfill our mission and roles.
Goals and Objectives

- As many goals as desired
- Be specific
  - “By 2017, we will replace 10 Public Access Computers”
  - “By 2017, we will expand our Public Access Computer bank to 50”
- Be sure to include the cost for future purchases
Technology Plan – Needs Assessment

- How do you know what you need in the future?
  - Staff input
  - IT support input
  - Wishlists
  - Statistics
    - Wait times for access
    - Computer usage
    - Trouble tickets
Technology Plan - Inventory

- Existing equipment and software
- Warranty information
- Vendor information
- Specific software and version information
- Equipment Tags, Property tags
Technology Plan - Staff Development

- What are the staff training goals?
  - What do they need to know?
  - What is the goal of training the staff about the technology available in the library?
  - Who will provide this training?
  - How much will it cost?
    - Is there a budget for staff training?
Technology Plan - Evaluation

- Methodology and results
  - Favorable and unfavorable
- Living document
- Using available statistics
  - Computer users
  - Wait times
  - Remote internet users
Disaster & Emergency Response Plans

- prevent or mitigate disasters
- prepare for the most likely emergencies
- respond quickly to minimize damage if disaster strikes
- recover effectively from disaster while continuing to provide services to your community
- D-plan: http://www.dplan.org/
How to Actively Plan

- Director & Image Evaluations
- Annual data collection survey
- Review existing plans as a board or decide what plans need to be created
  - Select a Planning Committee
  - Review Written Progress Document
Where to Find Help

- Peers
- Regional Library/TSLA
- Bibliography
- Online Resources