

**Stop Wandering Around Strategic Planning**  
Strategic Planning for Small & Medium Sized Public Libraries  
Using Sandra Nelson's Book: Strategic Planning for Results  
Indiana Library Federation  
November 15, 2011, Fort Wayne, Indiana

Presenters: Diane Huerkamp [ Mooresville Public Library ], Jake Speer [ Hussey-Mayfield Memorial Public Library ], and Martha Catt [ Strategic Planning & Resource Management Consultant ]

Task #1: "Design the Planning Process", See pages 5-21. Why plan? Prepare a planning schedule and budget. Develop a communication plan. Orient staff.

Task #2: "Start the Planning Process", See pages 22-35. Obtain Board approval. Select community planning committee members. Invite committee members. Prepare and distribute community and library information packets.

Task #3: "Identify community needs", See pages 35-42. 1<sup>st</sup> Meeting with the Planning Committee, presentation an orientation for members, develop community vision, define current conditions in the community, decide what needs to be done to reach community vision.

Task #4: "Select Service Responses", See pages 43-65. 2<sup>nd</sup> Meeting with the Planning Committee, select preliminary service responses, describe the current effect of preliminary service responses on current library services, and select final top 3 service responses.

Task #5: "Prepare for Change", See pages 66-76. Assess the Library's readiness for change. Work with library staff and board in making this assessment.

Task #6: "Consider Library Values and Mission", See pages 76-89. Define values and mission for the Library.

Task #7: "Write Goals and Objectives", See pages 90-107. Write goals and objectives. Determine if your objectives are measurable.

Task #8: "Identify Organizational Competencies", See pages 108-120. Understand and write organizational competencies and initiatives—a new concept in a strategic plan.

Task #9: "Write the Strategic Plan and Obtain Approval", See pages 120-126. Write the plan and get the Board's approval.

Task #10: "Communicate the Results of the Planning Process", See pages 126-136. Define the target audiences and develop a communication plan to reach these people.

### **Reading List**

- Edwards, Jack E. et al. How to Conduct Organizational Surveys: A Step-by-Step Guide. Thousand Oaks, CA: Sage Publications, c1997.
- Nelson, Sandra. Strategic Planning for Results. PLA Results Series. Chicago: American Library Association, c2008.
- Nelson, Sandra. Implementing for Results. PLA Results Series. Chicago: American Library Association, c2009.
- Rubin, Rhea Joyce. Demonstrating Results: Using Outcome Measurement in Your Library. PLA Results Series. Chicago: American Library Association, c2006.
- United Way. Measuring Program Outcomes: A Practical Approach. c1996. Available for \$5.00 from: <http://www.unitedwaystore.com>

## Strategic Planning for Small & Medium Sized Public Libraries – ILF 2011

---

2010

### Mooresville Public Library Community Planning Committee

- CEO, a local business
- Business Owner/Relay for Life Coordinator [fundraising]
- CEO, Morgan County Economic Development Corp.
- Bank President & member of local civic organization
- Morgan County Councilman, local businessman
- Library patron, used library's technology
- Pastor's wife
- Marketing Director, Morgan Co. Community Foundation
- Director, United Way of Morgan County
- Director, Churches in Mission
- Director, Mooresville Senior Center
- Pastor, local church
- Senior Coordinator, Meadow Lakes Assisted Living
- High School Students [2]
- Director, Day Care
- Tennis Coach and Teacher
- Elementary School Principal [Public]
- College Student
- Treasurer, Friends of the Library
- Library staff & Home school parent
- Library Board President, retired teacher
- Library Director

2011

### Hussey-Mayfield Memorial Public Library Community Planning Committee

- Elementary School Principal [Public]
- Director, Zionsville Nature Center
- Director, Zionsville Chamber of Commerce
- Director, Zionsville Boys & Girls Club
- Pastors, two local churches
- Administrator, Public School District
- Home school parent
- Director, Youth as Resources
- Library Director, Sullivan Museum
- Former President, Am. Assn. of Retired Persons
- President, Zionsville Town Council & former Library Board member
- Boone County Auditor & Library Leasing Corporation member
- Boone County Councilman & High School History Teacher
- Director, United Way of Boone County
- President, Public School Board
- President, Friends of the Library
- Library Teen Council member & high school student
- President, Library Board, Library Foundation Board & Teacher
- Member, Library Board, Library Foundation Board & Zionsville Boys & Girls Club Board
- Member, Library Leasing Corporation & Business Planning Consultant

## Strategic Planning for Small & Medium Sized Public Libraries – ILF 2011

---

- Web Address and Contact Information for Zionsville

<http://www.zionsville.lib.in.us/hmmppl/page/about>

[The Zionsville Strategic Plan has not yet been approved & posted. Check back]

Jacob Speer,  
Director of the Hussey-Mayfield Memorial Public Library  
P.O. Box 840  
Zionsville, IN 46077  
(317) 873-8964  
Email: [jakes@zionsville.lib.in.us](mailto:jakes@zionsville.lib.in.us)

- Web Address and Contact Information for Mooresville

The Journey to Excellence Strategic Plan is located on our website at:

[www.mooresvillelib.org](http://www.mooresvillelib.org)

When on the home page, click on 'Library', and then click on 'Policies'. The Strategic Plan is in PDF format.

Diane Huerkamp,  
Director of the Mooresville Public Library  
220 West Harrison Street  
Mooresville, Indiana 46158  
317-831-7323  
[www.mooresvillelib.org](http://www.mooresvillelib.org)  
Email: [dianeh@mooresville.lib.in.us](mailto:dianeh@mooresville.lib.in.us)

- Contact Information for Strategic Planning Consultant

Martha Catt,  
Consultant  
6761 Wimbledon Drive  
Zionsville, IN 46077  
317-769-3520  
Email: [mcatt@tds.net](mailto:mcatt@tds.net)

NOTE: Martha has almost 40 years' combined library management and consulting experience including Anderson Public Library, Hussey Mayfield Memorial Public Library, Indiana State Library, Highland High School [Anderson], and Eastern Indiana Area Library Services Authority.

Various awards including: *Service Above Self* [twice from Rotary Club of Zionsville], *Lifetime Achievement* [Indiana Library Federation] and *Distinguished Hoosier* [Governor of Indiana]

Contact for services and reasonable rates.