

Planning for Success

A SIMPLIFIED PLANNING PROCESS



2026

The Public Library Standards require that *the Board and Director identify in writing what they want to accomplish in the next 3-5 years, and that plan is focused on meeting community needs. The Board and Director annually review their plan and progress made.* A well-written plan can help the board set priorities for the library so that staff time, budget, and resources are being used most effectively to meet the community's needs.

This requirement may seem daunting, but your library's plan doesn't need to be overly ambitious or complex. The intent is for the Board and Director to regularly compare the library's mission and the community's needs with what the library is currently doing to meet or anticipate those needs. Your library's strategic plan should be a living document, meaning that the work of the library should be tied to its mission and goals to the extent possible.

Questions to ask when creating a useful strategic plan

What goals do we know we want to achieve within the library? Do we know who is using the library and who isn't using the library?

Start with what you know about your current users and potential user groups. What are your known priorities for the library?

What does our community want and need right now? What might they want and need in 3-5 years in order to be a thriving community?

Ask your community if you can. Think about the different groups in your community and who is and is not using the library. Make an effort to let everyone know you would like to hear from them.

Data might also help confirm trends that you are seeing in your community, such as demographic, economic, or educational data. What issues have been coming up at your city or county government meetings?

What would success look like if these needs were met? How can the library help address these needs within the scope of its mission?

Think of three or four realistic goals that would help address community needs. For example, if you hear from your community that senior citizens have a difficult time making it to the library, you might make a goal to provide outreach to seniors, finding other ways to deliver services or programming to them.

Your goals do not need to be brand new; they could expand upon the work you're already doing, if this work continues to be a main priority for your community. You may also wish to review the Montana State Library's Public Library Standards and the Standards Road Map to look for benchmarks that can help you to set goals.

What SMART activities could the library offer to help meet these goals?

Once you have identified a few goals, think about what SMART (specific, measurable, achievable, realistic, timebound) activities your library staff and partners could achieve over the next 3-5 years to meet these goals. Your goals should match your capacity to complete the work. That said, your goals could also be used for budget planning and fundraising to increase your capacity.

Plans inevitably change over time, and so you may expect your activities to change as well. If you've thought carefully through your major goals, the activities should still correspond to these goals. Regularly reviewing your plan can help the board and director identify where the budget and resources may need to shift to help meet your goals.

Evaluating your progress

Similar to planning, evaluation doesn't need to be complex to be useful. The intent behind evaluation is to help track progress towards your goals, to assess whether you have the resources you need to accomplish your goals, and to be able to share your results with your stakeholders.

Review your answers to the question, *what would success look like if these needs were met?*

Then complete these statements for each of your goals.

- Success looks like...
- This is important because...
- We can measure our success by...
- To accomplish this goal, we will need...

Planning exercise

Feel free to adjust these questions or the goal planning template to suit your needs.

Discuss the following questions at a board meeting or work session.

- What makes our library successful?
- How do we know if library is providing good service?
- What library-specific things would be nice to achieve?
- Who in our community is generally not using the library?
- What social and/or cultural trends might be impacting people's use of the library?
- How could we increase usage of the library?
- What might community members need, in general (outside of the library)? How can the library help within the scope of its mission?
- Working through our list, what can we realistically do? What is a priority? What are the top three things you would like to do?

After reviewing and thinking about your answers, create a list of your top three priorities that you want to make into goals for the next 3-5 years.

- Goal One:
 - 3-5 activities to complete to meet this goal:
- Goal Two:
 - 3-5 activities to complete to meet this goal:
- Goal Three:
 - 3-5 activities to complete to meet this goal:

Please contact your Consultant at the Montana State Library if you would like additional guidance on your board's strategic planning process.