

STRATEGIC PLAN IMPLEMENTATION GUIDE



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Introduction

You have your strategic plan. Now what? It's time to transition to implementation! The transition between the planning process and the implementation process can be tricky because the purpose of the process is changing. **The strategic planning process resulted in a final product: the strategic plan. The implementation process is an ongoing process.** It will span the life of the strategic plan and will evolve and change as your library learns, grows, and responds to the changing environment, available resources, and community and staff needs.

Your strategic plan includes long-term goals that likely require changes in your library's operations – big and small. In three steps, this Implementation guide will help you operationalize your plan and establish systems, practices, and procedures to help you make positive progress towards your strategic plan goals.

There are three interwoven steps to strategic plan implementation:

1. Develop an Activity Plan.

This is a document that breaks down and details the tasks library staff members will complete to make progress towards your strategic plan goals. In the Activity Plan, you'll list the activities that align with each goal. You'll prioritize activities based on budget, staffing, patron needs, and other considerations. The Activity Plan is a living document that is also used for ongoing management of strategic plan implementation.

2. Develop an Evaluation Framework.

This is a document that details the data you will gather to show progress toward plan goals. To develop your Evaluation Framework, you'll decide what success looks like for each activity and establish ways to track your progress. Having a systematic way to collect data and measure progress will help you adjust your Activity Plan during the life of your strategic plan.

3. Develop a Reporting Timeline.

This is not necessarily a written document, but is a timeline for how, when, and to which audiences the library will report progress toward strategic plan goals. When developing a Reporting Timeline, you'll also think about the reporting format, frequency, and mechanisms that make sense for the audiences you are trying to reach.



This three-step process helps teams focus and remain accountable. Developing a collaborative implementation process with strong systems, practices, and procedures helps your strategic plan come to life. For some libraries it can feel like an easy adjustment, for some it may feel like a huge shift. It may take some time to develop new feedback mechanisms and systems among your teams, but this plan is scalable to what works for your library, so don't take on too much at once.

Be ambitious *and* realistic.

Know that aligning your activities to your goals, tracking your progress towards your goals, and reporting on that progress to your stakeholders will help your library and its team maximize the impact your library has in the community you serve.

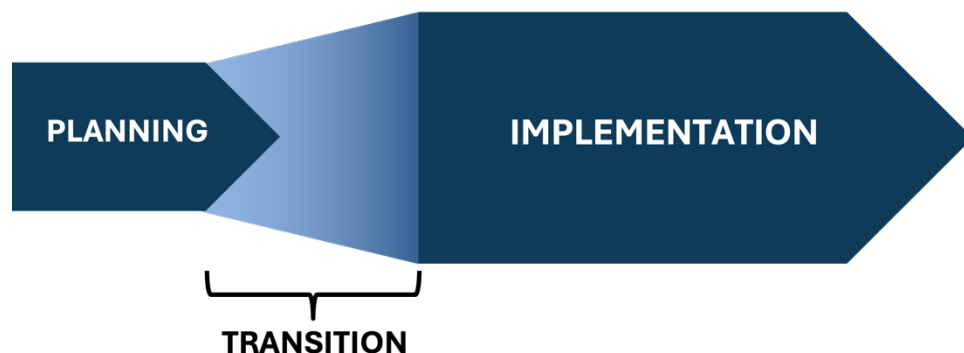
TIP!

Before operationalizing your new strategic plan, it's a good idea to assess the current systems, practices, and procedures that support the progress you've made towards your current strategic plan or other library-wide initiative.

This guide is not intended to replace any systems, practices, and procedures that are currently working for your library. Rather, we hope you will use this guide to enhance, refine, and refresh your current practices. If your library has never had a strategic plan or want to try something new for implementing your strategic plan and managing your progress towards plan goals, this guide will help you get started!

Transition to Implementation

An essential part of the strategic planning puzzle is the piece between the planning process and the implementation of your strategic plan. **This is where you are right now.** Implementation of your plan is a long-term and sustained effort. The steps you take in this transition period will help ensure that your strategic plan will be implemented efficiently, thoughtfully, and successfully at your library.



Activity Plan

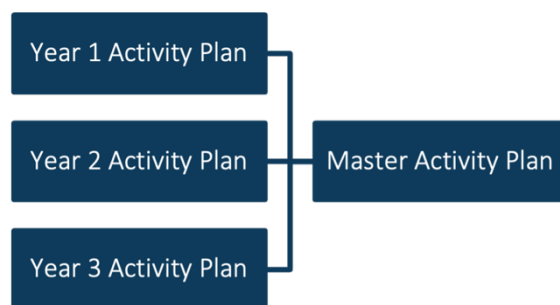
What is an Activity Plan?

An Activity Plan is a high-level document (or series of documents) that management teams use to track activities that will help you achieve the goals of your strategic plan. The Activity Plan is typically not approved or reviewed by library Boards as it is used to guide the day-to-day work of the library.

Creating the Activity Plan

Once your strategic plan is finalized by your Board, it is time to begin populating the Activity Plan framework.

A working document, your Activity Plan may be a spreadsheet (our preference) or integrated into a project management software. You should determine what format works best for your library. Your master Activity Plan should house all your activities, but you may want to work off an annual Activity Plan to focus your efforts for the current year.



TIP!

Your master Activity Plan should track all activities, even some activities that may be in the idea stage rather than implementation stage. **You never need to remove things from the master Activity Plan, just organize the activities based on priorities.** In this way, the master Activity Plan can serve as a parking lot for ideas that may need additional consideration or that need carried over to a future strategic plan.

Your activities should be nestled under each of the goals outlined within your strategic directions.

Your Activity Plan may look something like this:

Goal: Increase outreach to non-users.			
Activity	Responsible Party	Timeline	Update
Booth at farmer's market.	Jan	Plan in spring, booth in June, July, August	Passed out flyer for author event in June — 21 people said they attended because they received the flyer.
Be at school registration.	Paula	August	Talked to HS principal, she said she'd get back to me with details.



Each activity in your plan should have the following elements:

- » **Activity — Map activities that support each strategic planning goal.**
 - » What do staff and other library stakeholders need to do to achieve your goals? Start with feedback from the strategic planning retreat sessions. This will help you pre-populate your Activity Plan based on ideas generated during the retreat discussions. The goals were not yet set during the retreats, so you will need to align the ideas with the final goals.
 - » Once your strategic plan goals are final, you can gather additional staff feedback about how each staff member's individual work contributes to the strategic planning goals. This creates staff buy-in and helps supervisors understand how all the library's roles fit together to achieve the strategic planning goals. This is a great conversation to have at a department-level meeting and will help staff members see the development of the Activity Plan.
- » **Responsible Party — Define who is responsible for the activity.**
 - » Who is responsible for this activity or is overseeing this activity? Which staff member or department can implement the activity? Who should be held accountable for the activity's implementation? It's a good idea for the management team to take an initial pass at assigning responsibility and then recalibrating based on if a person/department/team is getting overused in plan implementation.
- » **Timeline — Define a reasonable timeline for the activity.**
 - » When is this going to happen? Some activities will be dependent on completing other activities and you can make note of that in the Activity Plan document. This will also give you a sense of the pace of potential new activities and you may need to recalibrate if you do not have the capacity to take on all the activities assigned during a particular time period.
- » **Update — Track activity updates.**
 - » What do others need to know about the status of this activity? Use this section to track internal activity updates like staffing changes, roadblocks, partnerships, and other considerations. Once an activity is completed or ongoing, note that too, so that your plan becomes a record of all the work you've completed.
- » **Priority (optional) — Demarcate the urgency of accomplishing this activity.**
 - » Establish a priority ranking (we like critical, high, medium, and low) to assign to different activities along with an explanation with what they mean to your library. Is this activity essential to complete before other activities can take place? Are there time critical elements to this activity that make it a higher priority? Is this activity more aspirational or a "nice-to-have" that may some time to see through?
 - » Ranking activities by their priority can complement the "Timeline" element as well.



Finalizing the Activity Plan

As the library starts to use the Activity Plan, gathers data to show progress, and layers on evolving patron needs, you'll want to refine your Activity Plan so it best serves the implementation process.

- » **Prioritize.** Which activities can start now? Which should start later? Is there the budget, staff, and patron interest for these activities? Assess which activities can be successfully executed based on your budget, available staff, stakeholder input, or other metrics. Consider a matrix or filter to help you prioritize your activities.
- » **Break up the Activity Plan into manageable increments.** We recommend that you start with a 12- or 18-month activity plan to keep implementation manageable. Another option is to create department, individual, or project specific plans so you can track specific details related to activities.
- » **Add activities as needed.** As your strategic plan progresses, you may see new pathways for impact. Your management team should regularly review the Activity Plan and add activities, if needed. Whenever a new activity is under consideration, discuss it first, and ask, "does this help achieve the goal?"

EXAMPLE

One library divided their activities into variation of the Eisenhower Matrix, separating them by high-impact/high-cost, low-impact/low-cost, high-impact/low-cost, and low-impact/high-cost to decide which activities to prioritize.

Reviewing the Activity Plan

The Activity Plan is a tool to track ongoing progress so it should be reviewed at least once a quarter, with a more comprehensive review on an annual basis.

Consider implementing this review process:

- » **Assess the Progress — Monthly**
What is or is not getting done on the timeline? Make a note in the update column.
- » **Check in with Staff Members — Quarterly**
Get buy-in, get input, and make sure they feel like the plan is achievable and impactful. What do they feel is working well? What needs adjustment?
- » **Host a Larger Review Session — Annually (at least)**
Bring in your management team and/or departments to discuss where particular activities are and what needs to move forward in the next year. Use the data you've collected to reflect on progress, make adjustments, or potentially go in a new direction. While your goals will not change, you can change how you are working towards those goals if you are not getting the results you hoped for.



Evaluation Framework

What is an Evaluation Framework?

An Evaluation Framework is a document that lists the metrics of success which will track each activity's progress. Evaluation can be complicated (see the Appendix for a list of the various types of evaluation to consider), but the goal is to evolve the way your library *gathers and uses* data to inform decisions about allocating resources that will help you work toward your strategic plan goals.

To effectively create your Evaluation Framework, you'll need to:

- » **Select the right kind of data to track.** Like brief satisfaction surveys after select library programs, for example.
- » **Collect and compile data.** One option is to create a survey and have a distribution plan and process for entering and tracking results.
- » **Review the data to gain insights and make decisions.** Look for trends in your data and analyze what they mean about effectiveness of an activity.

It's best to complete your Activity Plan before talking about metrics that will show your progress so you can align your data collection with the activities that help you achieve your goal.

TIP!

Don't make it too complicated. Start small. You can start with the statistics you already have and align them with your goals. Then choose one or two additional types of data to gather. Qualitative feedback and stories from people are meaningful ways to show progress provided you have a way to track, share, and reflect on the feedback.



Choosing the Right Data

Once your Activity Plan is in place, you should have a series of meetings to help you determine the way you want to measure success. Is there data you could be collecting, formal or informal, to assess your progress and if you need to make any adjustments?

To determine which data to track, start with some simple **if-then statements**. Ask your team, “If we do this activity, *then* what behavior or outcome should we see?” Then determine what data points you need to show that behavior or outcome.

TIP!

When thinking about what data you want to gather, you can also **start with the end in mind**.

What do you want to see patrons do or feel because of the library’s program or service? How will we know if this behavior or experience has happened?

If-Then Examples		
If	Then	Data
If we create new programming for non-English speakers	then, we should see increased non-English-speaker library users.	Survey program attendees to see if they are new to library programming.
If we do more targeted campaigns promoting databases	then, we should see increased usage of databases.	Monitor database usage statistics during a set time period around the targeted campaigns.

Consider these recommendations when determining which data to track:

- » It is tempting to use data like increased overall patron count as a simple metric for success. However, it will be very difficult to directly tie a single activity to an outcome like increased visitors overall. **It is always best to be specific.**
- » You may be tempted to set targets (like a certain percentage of increase in usage) but **be careful to only set specific targets that staff have control over**. Setting a specific numerical outcome target can set staff member up for failure by setting unrealistic expectations of performance when there might be little you can do to directly influence the behavior of community members. It’s better to frequently measure progress and review your process so you can adjust your plan or activities if things aren’t going the way you hoped.
- » **It’s important for staff to be involved in how success will be measured** so they feel connected to the strategic plan implementation process. Ask staff members to give feedback about what a successful day looks like to them. This feedback will help supervisors understand the outcome that staff members are striving for in their various roles. It can lead to a more holistic understanding of what success looks like at the library. Ask questions like:
 - » What do we hope community members will say about the library?
 - » How do we hope community members will feel if we do this?
 - » How will this change how we feel about our work?
 - » What does it look like if we are making progress?



Collecting and Compiling Data

Once you've determined what you want to measure, **you'll need a plan for how to collect and compile the data.** Thankfully there are a number of evaluation tools to choose from, both quantitative (numbers) and qualitative (stories and sentiments). Some will be more appropriate than others for specific activities.

If data collection is new to your library, start small. Lead by example and start with tracking data on a management level and then begin to model using that data to describe the daily activities at the library. Once data becomes part of the discourse in your library, you can start asking staff members to track data about their activities.

Below is an example of what your outcomes and metrics may be for a goal like "Increase outreach to non-users." Your library can use a variety of data-collection methods to track success and impact.

Goal: Increase outreach to non-users.

Outcomes and Metrics

- » Increased circulation.
- » Increased program participants.
- » New cardholders registered during school events.
- » Patrons provide positive feedback about the collection.
- » Patrons indicate satisfaction with programming.

Collection Methods

Statistics

Sometimes your metric for success is a simple number: patron count, program registrations, computer usage, or circulation. Make sure you develop a reliable way to keep an accurate count of the statistics you're tracking. This could look like a programming spreadsheet where staff can input the number of attendees or a patron counter at the front desk.

Remember, statistics like patron count are very hard to attribute to the success of one particular activity, so use those types of metrics to exemplify a more holistic view of success.

TRY THIS!

Hand out a postcard promoting Libby at the farmer's market. Tell people to come to the library with the postcard to receive a giveaway. The number of people who collect the giveaway is quantitative data helping you understand how many people engaged with the Libby promotional campaign.



Surveys

Some activities are not easily tracked by statistics. Getting new furniture to create a welcoming atmosphere might not lend itself to a particular statistic, so you need to think of ways to gather qualitative feedback from patrons. Small and large surveys can be a great tool to gather both quantitative and qualitative data, and you can use them to measure success for different activities.

Here are some examples:

- » **Post-Program Survey** — You have a captive audience, so why not ask them some questions? It's not necessary to conduct a survey after every program, but you should consistently survey program attendees to build a database to inform future programming decisions.

Here are three essential questions:

1. Please rate how satisfied were you with the program?
Alternatively, you can ask if the patron learned something or if they were entertained, depending on the type of program.
2. Would you recommend this program to someone else?
This gets you a net promoter score.
3. What ideas do you have for future programs?
You don't have to act on all the feedback you receive, but establishing this feedback loop shows that you are listening to your community and may lead to new ideas.

- » **Satisfaction Surveys** — These can be as simple as asking patrons to use a five-point scale to "rate your satisfaction with our new furniture." It's critical for continuous improvement to regularly solicit feedback from the community, that you have a way to track this feedback over time, and that you take the time to holistically review this data to look for trends and inform changes you might make in the future.

- » **Community Surveys** — Get broad feedback about strategic plan progress by asking about overall satisfaction or about the specific goals that patrons have noticed. You could ask:

- » How satisfied have you been with your library experience this past year?
- » Have you used the library in the past month (quantitative)?
- » Give an example of how the library has helped you in the past year (qualitative).
- » Have you noticed shorter hold times for books?

- » **Website Surveys** — Use pop-up surveys on your website with one or two questions about website navigation. Ask:

- » Were you able to find what you were looking for today?
- » What would have made it easier to find what you were looking for?

Survey fatigue is real, so it's important to consider proactive and passive ways to survey your patrons. The goal is to create a system of gathering feedback so it becomes engrained in your operations. You can offer a survey online (consider handing a tablet to a patron while you are checking out their items), on paper (ask the patron to fill it out while you are checking out their item), or verbally (ask the patron the questions as part of your service transaction and make note of the responses after they depart).

TRY THIS!

Create incentives for people to provide feedback or engage with your promotions. "Participate in this survey for a chance to win a free pizza!"

To avoid an online survey being spammed from people outside of your service area looking for a prize, offer the incentive only to people that come to the library to complete the survey.



Staff Stories and Service Desk Data

The community members that use your library give your staff members feedback every day, but most libraries don't have a way to capture this feedback (good and bad!).

It's important to find ways to empower your staff to seek formal and informal feedback from patrons and systematically track it. This can be as simple as a shared document for staff to input any feedback they hear from patrons. Or you can have focused strategies for staff to receive and track feedback and use a formal system like a form or service tracking software.

It's not enough to just capture staff stories — you must implement an easy-to-use system for staff to collect feedback and a process for reviewing, responding, and potentially making changes based on the feedback. This feedback can also be helpful when you are reporting progress towards strategic plan goals.

TRY THIS!

For one-full week front desk staff members ask patrons if they like the new furniture, tracking feedback in a shared document.

EXAMPLE

One library created an "I said no today!" form where staff tracked whenever they said no to a patron and why. **Leadership was able to review this information regularly, helping to inform training and other patron service decisions.** To close the feedback loop, after the library's leadership discussed the feedback, they would add feedback to the form so everyone in the library could review the situation and the response.

Suggestion Box or Feedback Box

Suggestion boxes are a great way to give people the opportunity to provide feedback on their own time and anonymously. These boxes can solicit general suggestions for the library year-round or they can be temporary installations on a general topic. Again, it's crucial to have a system for how you collect this feedback, compile it, and review it when evaluating progress towards strategic plan goals.

Social Listening

There are many ways to gather feedback from your community and patrons via social media. Here are a few examples to consider:

- » **Your Social Media** — Is content from the library's social media being liked, shared, or discussed? What is resonating most with the social media audience? How are different programming, collection, and services announcements being shared or discussed? Establish a system to compile social media comments to review them holistically when evaluating progress towards strategic plan goals.
- » **Community Social Media** — Check out community Facebook groups or the pages of other local organizations to understand the current needs of the community. Before a formal review of your strategic plan, you can compile a few bullet points with observations from the community listening.
- » **Google Alerts** — Set up a Google Alert for your library to monitor how it is being discussed in the local media or other online groups. Track alert links to make note of the reach and influence of the library.



Focus Groups and Interviews

Focus groups and interviews can be opportunities to understand the behaviors and attitudes of your patron base (or non-users) more deeply. They can also be time and resource intensive. These tactics are best utilized when you want to assess the success of your overall strategic planning efforts and multiple activities.

Secret Shopper

Recruit informed individuals to take a trip to your library, maybe even with a list of actions you would like them to take (find a specific book, navigate to the second-floor water fountain, find a quiet place to study with an electrical outlet, log onto the WiFi, ask a staff member about how to sign up for online newsletters). These “secret shoppers” should then be able to report back on pinch points and patron service experiences. Similar activities can be conducted online to serve as an evaluation of your website or catalog.

Journey Mapping

Observe patron behaviors in-person and online to identify pinch points at your library. In-person, you may observe how patrons use seating areas. Are there enough chairs? Are they spaced out evenly enough? Are patrons looking for additional resources like electrical outlets or WiFi information?

Map user experiences online using website analytics, paying special attention to popular pages and bounce rate.

Data Storytelling

Numbers alone do not tell the story. Give staff and your Board (and maybe even your community!) a reporting mechanism (an online form is a simple option) for sharing positive patron interactions or meaningful conversations that you can use for reporting.

TIP!

You can combine multiple data-collection methods in support of a specific activity.

For example, if you want to update your wayfinding signs, you could combine the secret shopper, journey mapping, and service-desk data methods.

Before making changes to your wayfinding signs, have library staff walk through entrances and place a sticky note where they look first for information (secret shopper). Follow up that activity with temporary wayfinding signs printed on poster paper, then have desk staff survey patrons about how easily they were able to find what they needed (journey mapping and service desk data).



Collection Frequency

Be sure to identify which data needs to be collected continuously or once in support of a specific activity.

The table below offers an example of how long select data collection methods should be in place at a library.

Data Collection	Frequency	Intent
Community Survey	Once every 3-5 years	To understand broad community satisfaction of high-level elements of the library.
Patron Feedback at Service Desks	Continuous	To provide a continuous feedback loop and show your patrons that you are listening to their concerns and highlighting positive feedback.
Satisfaction Survey	1-4 weeks	To collect patron feedback about a specific initiative or change.
Google Alerts	Continuous	To monitor public sentiment and communications related to the library.

Storing Your Data

Determine where all of this information will be stored and who is responsible for monitoring the data. You've spent considerable time setting up a collection process and gathering the data — make sure it is easily accessible so it can be put to good use. Be sure to include a reporting task at the end of the data collection to share out what you've learned.

Reviewing and Using Data

After you have selected the right data to track and collected and compiled that data, it is time to review the data and use it to make decisions. This review process allows for a continuous improvement model. It empowers you and your team to use data to make changes that help you better achieve your goals.

Review Regularly

Set aside time to look at your data regularly, this may be monthly or quarterly. Are you seeing patterns? Are patrons' attitudes and behaviors reflective of what you're trying to achieve at the library? What did people really like? What is not working as expected? What are we learning from our work?

TIP!

While reviewing the data, pick out metrics or stories to share with your patrons and other library stakeholders.

Use the positive feedback you receive from the community in your marketing and promotions and on grant proposals and other communications to stakeholders. Showing your community what data you're collecting lets people know that you care about what library patrons want and need.



Make Data-Driven Decisions

Once you understand what you're seeing in your data, use it to make data-driven decisions. Here's an example process from goal-creation to data-driven improvement:

- » **Goal:** Increased usage of Libby across patron ages
- » **Activity:** Promotion strategy for Libby during the month of October
- » **Evaluation:** Tracking Libby usage before, during, and after promotional campaign
- » **Review:** Usage increased during the promotional period, but not among teens
- » **Change:** Focus more effort on reaching teens during next promotion

Additional Resources on Evaluation and Using Data

- » [Kate McDowell](#)
- » [Christian Lauerensen](#)
- » [Research Institute for Public Libraries](#)
- » [PLA/ALA Data Benchmarking](#)
- » [PLA Project Outcome](#)



Reporting Timeline

What is a Reporting Timeline?

Once you have a framework for developing and tracking activities, and measuring success, you'll want to think about reporting to stakeholders to be accountable and get additional feedback.

Reporting holds you accountable to the strategic directions and goals in the strategic plan. It is an occasion to take a holistic assessment of the progress you've made over a certain period and to inform your stakeholders of important updates. Reports will look different for different audiences. You're most likely to share reports with your Board, your managers and staff, and your patrons and community members.

Reports for Board

You're already reporting to your Board, but now you have an opportunity to align your monthly Board updates with the strategic directions of your strategic plan. By keeping the strategic plan language in front of the Board, it is a continuous reminder of your priorities and your progress.

EXAMPLE

See this Director's Report example by [The Urbana Free Library](#) which mimics the layout of their strategic plan.

Reports for Managers and Staff

On a regular basis — and at least annually — the management team should consider writing a report to reflect on the data that's being gathered and how it shows progress toward your strategic goals. Writing this report gives management an opportunity to sit down with other leadership members and staff to assess data gathering mechanisms and the progress in the Activity Plan. This process will help inform activity planning for the next year and help management and staff members adjust.

Reports created by staff members can be helpful tools for management as well as good learning opportunities for staff. Once staff understand the activities that help achieve strategic plan goals and the outcomes, then they can help track success.



Reports to Community and Other Stakeholders

Because you're tracking and creating reports for Board and staff, you can easily update your community members and patrons on how you're progressing. For this audience, you only need snapshots and highlights. Use the positive feedback you receive from the community in your marketing and promotions and on grant proposals and other communications to stakeholders. Include progress in an annual report using statistics, stories, and photos that serve as proof that you're making progress on your goals. You can also trickle out stories of your successes through social media feeds and newsletters.

Use community reports to show people that you are making meaningful change at the library, responsibly spending their tax dollars, and making a positive impact in their community. Consider using an infographic or other tool to visually represent the progress of the library.

TIP!

Don't limit yourself to only reporting on items in the Activity Plan. Everything the library does should be aligned with your strategic directions, so include all staff activities in your reporting. This will allow staff see how their work contributes to achieving your strategic goals and how core library services can make an impact in the strategic plan. Staff should be deeply involved in the reporting process.



Bringing It All Together

The Activity Plan, Evaluation Framework, and Reporting Timeline are the three essential elements of your strategic plan implementation. They work in tandem and inform one another:

- » Your **Activity Plan** outlines how you will go about accomplishing the goals set forth in your strategic plan, including who is responsible for each activity, the activity timeline, and its priority.
- » Your **Evaluation Framework** establishes how you will measure each activity's progress.
- » Your **Reporting Timeline** will explain to various stakeholders how you've made progress or altered your activities to support your strategic plan.

Remember, your Activity Plan is a living document that is also used for ongoing management of strategic plan implementation — what you learn through your evaluation of the activities, using data, can help modify the Activity Plan to ensure you are responding to your community's needs while staying focused on the goals outlined in your strategic plan.

And don't forget to report on your progress and success throughout the implementation of your plan. Your Board, staff, and community deserve to hear how the library is working strategically toward the goals established in your library's long-term plan.

