

# Applying Forecasting Data to Your Strategic Plan

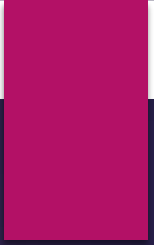
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# What is a strategic plan?

- ▶ Where are we now?
- ▶ Where are we going?
- ▶ How do we get there?



Does your library have a  
strategic plan or vision  
document?

Is it currently being used  
successfully?

# Demographic Shifts

## What are they?

- ▶ Age
- ▶ Income
- ▶ Education
- ▶ Rural/Urban
  - ▶ The suburbs now have more poor people living in them than do inner cities.



## Think Ahead

How will  
changing  
demographics  
impact your  
plan

- ▶ Lifestyle changes
  - ▶ Impact on service delivery and access to information and material
    - ▶ Mobile library/automated book delivery
    - ▶ Digital resources
    - ▶ Need for new models – how to connect
- ▶ Library as civic focal point
  - ▶ Library staff recognized expert in the community
  - ▶ Adapt to the neighborhood
  - ▶ Creative ways to engage volunteers
  - ▶ Seek partnerships and create alliances with other groups – social or governmental

## Think Ahead

How will  
changing  
demographics  
impact your  
plan

- ▶ Financial impact
  - ▶ Collection development
    - ▶ People with disabilities
    - ▶ Local interest
    - ▶ Strengthen contribution to education
  - ▶ Technology
    - ▶ Technology to assist special demographics
    - ▶ New ways to connect patrons with staff
  - ▶ More spent on physical accommodations
    - ▶ Creative space planning to make library buildings flexible and responsive
    - ▶ Library becomes or expands as community hub
    - ▶ Changing tables give way to caregiver assist restrooms

# Tweaking your strategic plan

**LOOK AT YOUR VALUE  
STATEMENTS OR STRATEGIC  
FOCUS**



# How to apply to your plan

- ▶ Pull it off the shelf
- ▶ Ask how these changes impact each of those value statements.
  - ▶ Is it only certain branches?
  - ▶ Library consolidations?
  - ▶ District library?



# How to determine which changes apply to your library



Talk to local  
**REALTORS**  
about  
property  
values

Check local  
schools and  
enrollment  
rates

Look at  
urban  
planning

Flight back  
to cities-  
gentrification

Don't be afraid to be  
open minded. Your  
brain isn't going to  
fall out.



Be flexible



Be forward  
thinking



Be open  
minded



# Connectivity will be key!

- ▶ Connecting services
  - ▶ Internet of things
  - ▶ Cloud based
- ▶ Envision interaction between people and things throughout library/city/world
- ▶ Libraries must increase their social and economic resilience to meet demographic changes
  - ▶ Holistic vision and view of library
  - ▶ Think about connecting to infrastructure
  - ▶ Data driven approach
    - ▶ Network of networks

What will your community look like in 3, 5 or 10 years?

How will you remain relevant and welcoming to all?





# Tweaking your strategic plan

## LOOK AT WHAT IS HAPPENING WITH YOUR PATRONS

- The Spring Lake Library offers totes for senior citizens with challenges to eyesight, hearing, dementia, or mobility

# What will your patron profile look like?

- **Demographics:** Age, generation, gender, income, family size, life cycle, occupation, education, religion, race, ethnicity, social class, health
- **Lifestyle:** Innovators, thinkers, achievers, makers, survivors
- **Usage:** Occasions, usage rate

**Millennials will comprise more than one of three adult Americans by 2020 and 75% of the workforce by 2025.**

What about the demographics of your staff and board?

Should you be working to add diversity?

- Age,
- Gender,
- Income,
- Ethnicity,
- Religion,
- Occupation,
- Health

## Other issues

Discrimination and  
Accommodation

Gender  
Identification



# Politics





# Politics

- ▶ National
- ▶ State
- ▶ Local







When implementing a new strategic plan, how can demographic data help?

# Assess your strategic position

- ▶ **Technological** –the emergence of competing technologies, productivity-improving equipment, internet connectivity
- ▶ **Economic** – changes in consumer demand and income, interest rates, inflation
- ▶ **Environmental** – changing expectations of customers, regulators, and employees on sustainable development
- ▶ **Political** – changes to taxation, trading relationships, or grant support for entities
- ▶ **Legal** –changes to employment law, to the way your sector is regulated or policies reducing equitable access to information
- ▶ **Ethical** – ethical and moral standards governing policies and practices including those impacting intellectual freedom and anti-censorship policies

# Understanding demographics is part of your environmental scan



How do you make sure you are addressing those changes?

- ▶ Plans must be flexible and fluid.

# Demographics impacting library planning

## Population estimates and projections can impact

- budget, human resources, facility needs
- zoning, the location of public facilities such as schools, fire station sites, parks, low-income housing developments
- planning of mass transportation routes

## Census data can be linked with local data

- economic, crime statistics,
- per capita income, poverty, unemployment, median family income
- adult illiteracy ratios
- public health indicators: teen pregnancy rates, infectious or chronic diseases, disability rates

# Future Education specifics to consider



- ▶ Need for bilingual educational materials
- ▶ Location of new educational facilities, and logistical issues (public transportation, the allocation and distribution of resources).
- ▶ Lower median years of completed schooling
- ▶ Lower percentage of high school graduates
- ▶ Rates of movement through grade levels
- ▶ Health issues

Top five take  
aways to  
consider in your  
current or  
future planning

Migration/Immigration

Community Age/Health

Technology/Connectivity

Education/Lifelong Learning

Funding/Political



# Questions?

Contact information

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Michigan Library Associ

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RFP list for your strategic  
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# MIA

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