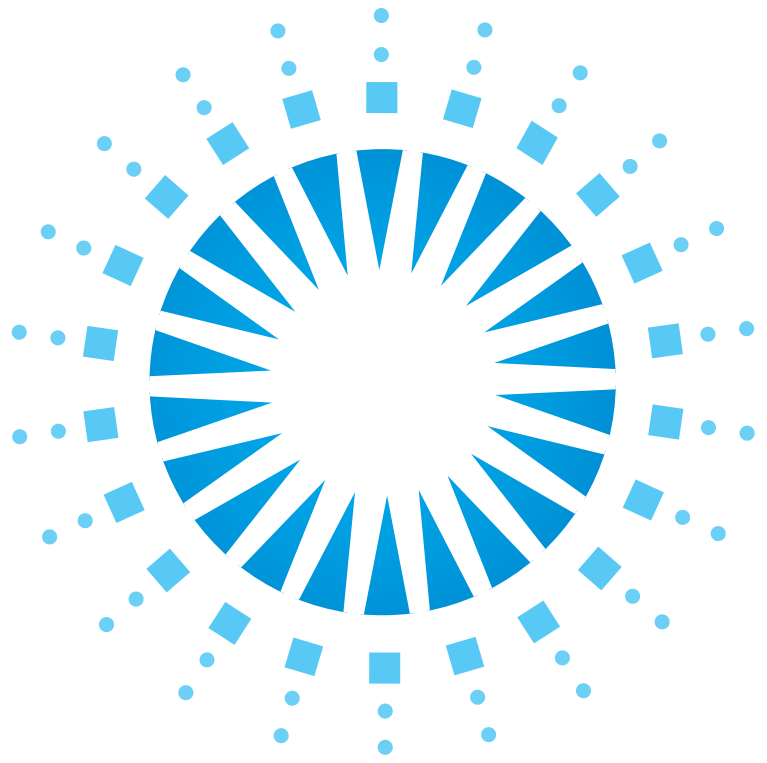


Northeast Ohio Regional Library System

School | Public | Academic | Special
Maximizing Library Potential Together



STRATEGIC PLANNING

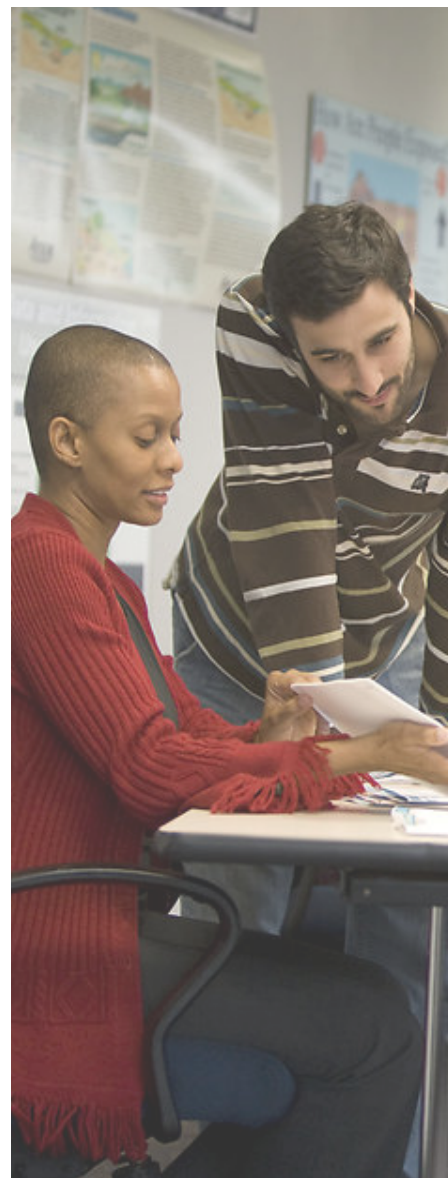


Strategic planning is a critical activity in the success of many organizations

enabling them to focus on a common set of significant issues, providing a forum for conversation and yielding a powerful and shared sense of the future. The end result is a roadmap for accomplishing the shared vision and goals, helping to establish priorities, define spending, support decision-making and adjust course.

The Northeast Ohio Regional Library System uses an adapted version of the Balanced Scorecard methodology for strategic planning. The Balanced Scorecard:

- **Combines strategic planning and strategic management**
- **Covers a one-two year timeframe to provide optimal organizational flexibility and adoption of trends**
- **Involves community, Board, library administration and library staff, thus facilitating communication, cooperation and buy-in across all levels**
- **Focuses and aligns goals and objectives through the use of library-specific perspectives**
- **Aligns key performance measures with strategy at all levels**
- **Results in SMART Action Steps which are measurable and time-framed**
- **Adjustable timeline depending upon depth of information to be collected, number of Focus Groups held, availability of Board, Director and staff**
- **Includes Project Management Strategy to ensure implementation and completion**
- **Adaptable to libraries of any size**



The Core Planning Track is recommended for all libraries but may be customized further as needed. The Premium Planning Track is recommended for libraries with little or no experience in Strategic Planning, with new Administration, new Boards or without a current Strategic Plan.

For more information on NEO-RLS's Strategic Planning service, contact Betsy Lantz, Executive Director, at betsy.lantz@neo-rls.org or 330-655-0531, ext. 101.

Strategic Planning Cost

NEO-RLS charges an hourly consulting fee for strategic planning assistance. The total cost is based on the number of hours involved and the level of library membership.

2016-2017 (ends June 30, 2017) charges are as follows: \$250.00 per hour with a 75% discount provided to Gold Member libraries; a 60% discount provided to Silver Member libraries; a 40% discount provided to Bronze Member libraries. Geographic Member libraries are charged the straight hourly fee.

2017-2018 (begins July 1, 2017) charges are as follows: \$100.00 per hour for Gold Member libraries with 4 hours FREE; \$125.00 per hour for Silver Member libraries; \$150.00 per hour for Bronze Member libraries; \$200.00 per hour for Geographic Member libraries.

Strategic Planning to Fit Your Needs

Strategic Planning Services		CORE Planning Track	PREMIUM Planning Track
Project Management Strategy	5 Hours	✓	✓
Online Community Survey	1 Hour	—	✓
Staff Survey	1 Hour	—	✓
Stakeholder Focus Group (1.5 hour focus group, 3.5 hours groundwork)	5 Hours	—	✓
Survey Analysis Report	8 Hours	—	✓
Board Goal-Setting Retreat (4 hour retreat, 4 hours groundwork)	8 Hours	✓	✓
Library Team Objective-Setting Retreat (5 hour retreat, 5 hours groundwork)	10 Hours	✓	✓
Design Draft Plan	8 Hours	✓	✓
Final Compilation and Communication of Plan	8 Hours	✓	✓

Strategic Planning Services Defined

Project Management Strategy: A key component in the success of any strategic plan is effective implementation and accountability. Depending upon the size of your library and staff, your project management strategy may be overseen by a single person (e.g. the Director or Deputy Director) as Project Manager, by designated individuals (e.g. Department Heads) or by a team. NEO-RLS will help you select the appropriate people, train them to shepherd the plan through implementation and completion, and will advise on the creation of a project management flow chart to track tasks and milestones.

Online Community Survey: NEO-RLS will provide a customized survey to distribute to your community online and/or in print.

Staff Survey: NEO-RLS will provide a customized survey to distribute to your staff online and/or in print.

Stakeholder Focus Group: Hosting a 1.5 hour focus group for selected stakeholders can elicit information not always obtained from the online community survey. NEO-RLS will help organize and facilitate one Stakeholder Focus Group if requested.

Survey Analysis Report: NEO-RLS assembles the information from the online community and staff surveys into an easily viewed format for your Board of Trustees. In addition, NEO-RLS will add information on the trends facing libraries today.

Board Goal-Setting Retreat: NEO-RLS will facilitate a 4-hour Board Retreat for Trustees, Director and Fiscal Officer. During the retreat core values are established/reviewed and vision and mission statements created/reviewed. Participants will discuss input from the community survey and work in small groups on a SWOTA (Strengths, Weaknesses, Opportunities, Threats and Aspirations) analysis to identify emergent themes for use in establishing overarching goals.

Library Team Objective-Setting Retreat: NEO-RLS will facilitate a 5 hour Library Team Retreat for identified library staff. NEO-RLS will help you determine the appropriate number and composition of staff for participation in the Objective-Setting Retreat. During the retreat, NEO-RLS will review the goals established during the Board Goal-Setting Retreat. Participants will work in small groups to examine each goal through five different, library-specific perspectives (Customer, Staff, Information Resources, Internal Processes, Financial). Emerging themes will be identified for use in establishing objectives under each goal. NEO-RLS will also discuss the formation of SMART (Specific, Measurable, Attainable, Relevant and Timely) Action Steps in order to promote measurement and accountability.

Design Draft Plan: NEO-RLS will draft a plan that includes the overarching goals and objectives for approval by the Board.

Final Compilation and Communication of Plan: NEO-RLS will compile Action Steps created by the library staff into the final plan for presentation and approval by the Board.

NEO-RLS Strategic Planning Staff

Betsy Lantz, M.L.S., M.F.A., Executive Director, has worked in a museum research library, academic libraries, a corporate library and a public library over the past 32 years and has been a library administrator for 28 years. Throughout her career she has led library and archives strategic planning and has participated in larger, institution-wide strategic planning. She has led strategic planning for three libraries and consulted on one additional strategic planning project while at NEO-RLS.

Melissa Lattanzi B.S., has been employed for 22 years with NEO-RLS and brings her vast knowledge of public libraries to bear on the strategic planning process. She has led the strategic planning process for several libraries and has participated in the facilitation for many other libraries.

Holly Klingler, M.L.I.S., M.A. has been employed for 3.5 years with NEO-RLS and brings her extensive public-speaking experience and academic interest in critical thinking to the strategic planning process. Ms. Klingler helped lead the strategic planning process for several libraries and has participated in the facilitation for many other libraries.

Our Strategic Planning process allows room to introduce new ideas, share new information and include new voices



Libraries that have used NEO-RLS for Strategic Planning

Ashtabula County District Library

Burton Public Library

East Cleveland Public Library

Kingsville Public Library

Kirtland Public Library

Mansfield-Richland County Public Library

Orrville Public Library

Ritter Public Library

Warren-Trumbull County Public Library (3 times)

Westlake Porter Public Library
