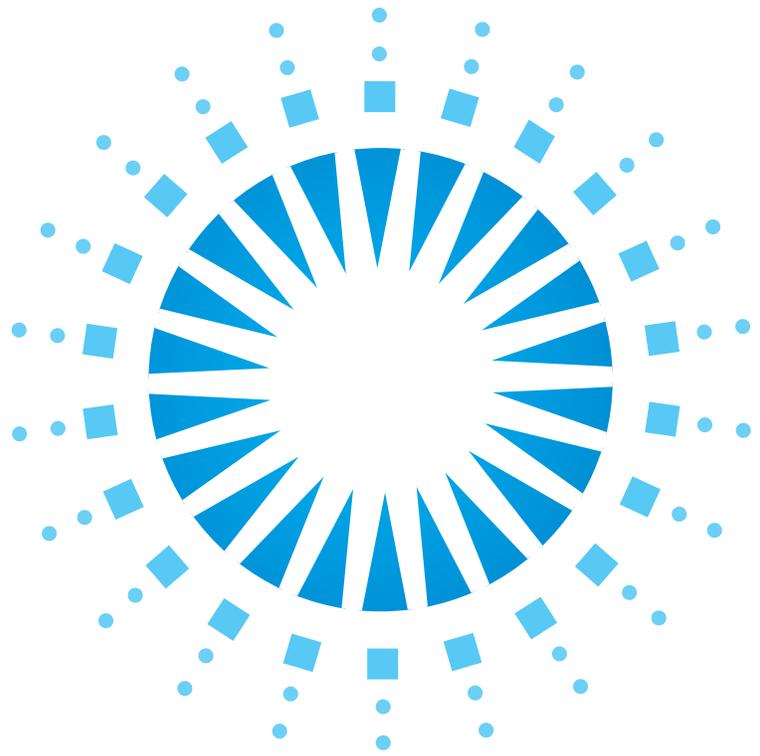


Northeast Ohio Regional Library System

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 a process based on successful strategic planning methodologies. The process:

- **Involves community, board, library administration and library staff, thus facilitating communication, cooperation and buy-in across all levels**
- **Identifies overarching goals and the accompanying strategies and SMART Action Steps needed to achieve goals**
- **Focuses and aligns goals and strategies based on library-specific perspectives**
- **Yields SMART Action Steps which are measurable and time-framed**
- **Produces a one-three year plan to provide optimal organizational flexibility and adoption of emerging trends**
- **Allows for an adjustable process timeline depending upon depth of information to be collected, number of Focus Groups held, availability of board, administrators and staff**
- **Adaptable to libraries of any size and type**



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.

2017-2018 (begins July 1, 2017) charges are as follows: \$100.00 per hour for Gold Member libraries. Gold Members receive a total of four (4) hours of free consulting which may be applied to any consulting costs. The hourly cost for Silver Member libraries is \$125.00 per hour, \$150.00 per hour for Bronze Member libraries and \$200.00 per hour for Geographic Member libraries.

Strategic Planning to Fit Your Needs

| Strategic Planning Services | | CORE Track | PREMIUM Track |
|---|---------|------------|---------------|
| Discussion with Director | 2 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 Leadership Team Strategy-Setting Retreat (4 hour retreat, 4 hours groundwork) | 8 Hours | ✓ | ✓ |
| Library Leadership Team Action Step Formation Retreat (1.5 hour retreat, 1.5 hours groundwork) | 3 Hours | — | ✓ |
| All-Staff Brainstorming Retreat (1.5 hour retreat, 1.5 hours groundwork) | 3 Hours | — | ✓ |
| Design Draft Plan | 8 Hours | ✓ | ✓ |
| Final Compilation of Plan | 8 Hours | ✓ | ✓ |

Strategic Planning Services Defined

Discussion with Director: A key component in the success of any strategic plan is excellent communication between the facilitator and the Director. NEO-RLS will discuss your specific needs and challenges with regard to the strategic planning process and help shape the best possible outcome for you, your board and staff. We will outline the process in greater detail, discuss which steps make the most sense for your library, discuss expectations in terms of timeframe and deliverables and provide additional resource information as requested.

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 will compile information from the Focus Group(s), All-Staff Brainstorming Retreat, and online community and staff surveys. The information will be given to you in an easily viewed format for presentation to your Board of Trustees together with an Executive Summary and information on 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 survey analysis report 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 Leadership Team Strategy-Setting Retreat: NEO-RLS will facilitate a 4-hour Library Leadership Team Retreat for identified library staff. NEO-RLS will help you determine the appropriate number and composition of staff for participation in the Strategy-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 strategies (or objectives) under each goal.

Library Leadership Team Action Step Formation Retreat: NEO-RLS will facilitate a 1.5 hour retreat to examine the ideas generated from earlier retreats and discuss prioritization and the steps involved in creating SMART (Specific, Measurable, Attainable, Relevant and Timely) Action Steps in order to promote measurement and accountability in fulfilling strategies and meeting goals.

All-Staff Brainstorming Retreat: NEO-RLS will facilitate a 1.5 hour brainstorming retreat for your entire staff that includes brainstorming exercises and small group work. Groups will examine a variety of “big picture” topics with information collected and utilized throughout the strategic planning process.

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

Final Compilation of Plan: NEO-RLS will compile the SMART Action Steps created by the Library Leadership Team into the final plan for presentation and approval by the board. An Excel Work Plan template will be provided for libraries that wish to track individual work plan tasks.

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 seven 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

Marvin Memorial Library

Orrville Public Library

Ritter Public Library

University Libraries, University of Akron

Warren-Trumbull County Public Library (3 times)

Westlake Porter Public Library
