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## Forsyth County Public Library Strategic Planning, 2013 - 2018

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## Forsyth County Public Library Strategic Planning, 2013 – 2018

By Carla Beasley

*"Would you tell me, please, which way I ought to go from here?"*

*"That depends a good deal on where you want to get to," said the Cat.*

*"I don't much care where—" said Alice.*

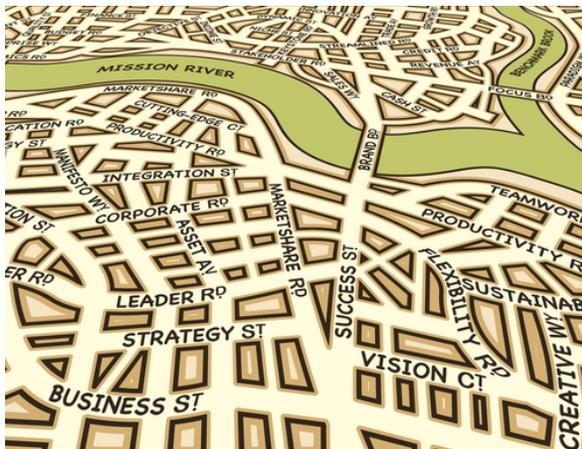
*"Then it doesn't matter which way you go," said the Cat.*

*"—so long as I get SOMEWHERE," Alice added as an explanation.*

*"Oh, you're sure to do that," said the Cat, "if you only walk long enough."*

Lewis Carroll  
Alice in Wonderland

Strategic planning provides a road map. Find where you are now, and then figure out where you want to go. Strategic planning requires discussions and setting priorities among key decision makers and managers about what is *truly* important for the organization. Strategic planning is essential to deal with changes — changes in technology, changes in funding, changes in demographics, and changes in demands on resources. By not planning, an organization allows outside forces to determine its course.



But strategic planning is more than nuts and bolts. What *is* strategic is when you're doing something that changes the structure of the library in some basic way. Move our self-check

stations closer to the door to increase use? That isn't strategic, because it is not a change in the way we interact with our users. Combine the circulation and information desks into a central service point? That is strategic because it creates a different relationship with the patron. It changes who we hire, how we manage them, and what they're capable of achieving.

### The Current Plan

Forsyth County Public Library (FCPL) had developed a five-year strategic plan in 2007. It was simple, with three goals:

- Make the library more convenient to use
- Foster life-long learning
- Maximize operational effectiveness

Under each goal were four objectives (which we called strategies), and under the strategies were project tasks. At each of our management team quarterly review meetings, we have evaluated the project list, asking ourselves if our tasks were in line with the strategic plan goals. The management team (MT) consists of the director and heads of five departments: Public Services, Information Technology, Human Resources / Finance, Materials, and Planning and Facilities. As head of planning and facilities, I monitor the existing strategic plan, set up quarterly MT review sessions, and plan the annual MT retreat in December.

### Making a Change

In the fall of 2012, at our third quarterly review meeting, we found that, for the most part, our goals from 2007 had been accomplished. Projects we have successfully completed since 2007 include self-check units at each of the library's three branches, online meeting room

and summer reading registrations, a redesign of the library's website, and self-pick-up of holds (Goal 1); online interlibrary loan and collection request forms, a new classic movie collection, and e-books (Goal 2); and RFID tags in all collection items to make check out and check in faster (Goal 3).

Projects under the 2007 goals had become routine. They were tasks to do over and over again rather than something new and innovative. For example, after we'd installed the self-check machines, we set ourselves a project to increase the percentage of patron checkouts using these machines. We were saying, "Let's keep doing what we're doing, and let's do more of that." This is not planning for the future; it's not strategic planning.

It was obviously time to revise our 2007 Plan.

First, we researched strategic planning methodology in order to provide ourselves with a workable structure. Several sources suggested the following questions:

- Where are we?
- What do we have to work with?
- Where do we want to be?
- How do we get there?

### **Where Are We?**

Having done strategic planning in the past, we had this step covered with the following documents and information:

- A mission statement: *Our mission is to provide access to materials, information, and programs delivered by a courteous and informed staff to all members of the Forsyth County community.*
- In-house statistics: circulation, computer usage, people counts, program attendance, reference transactions, and more.

- Environmental scanning (a picture of our community) from county-wide demographics from the 2010 Census. We knew that Forsyth County had 175,511 residents as compared to 98,407 residents in 2000, median income was \$87,600, Asian and Hispanic communities were increasing, and 44 percent of the population had advanced degrees.

### **What Do We Have to Work With?**

From these statistics, we felt confident in identifying our resources from an administrative perspective. We had a lean but adequate budget, supportive library board members, library branches in the north, central, and south parts of the county, an often-complimented staff, and an up-to-date collection.

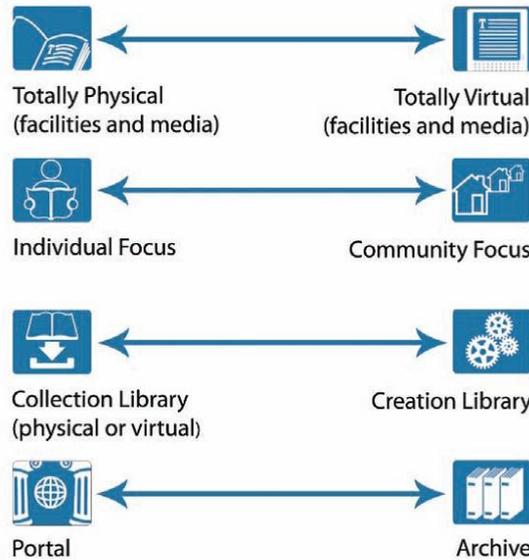
### **Where Do We Want to Be?**

From our statistics and resources, we could draw some conclusions about what patrons wanted. We'd had to cut back open hours three years ago due to budget reductions, and we knew that patrons wanted those open hours back. We knew that all library computers were in use at our Cumming branch, but most patrons were bringing in their personal laptops at the Sharon Forks branch. We knew that many users purchased books rather than waiting on a hold list, and that residents placed a high value on education.

But these were all "indirect" statistics, measures that told us what patrons do, but not asking directly what they want the library to do for them.

In 1999, FCPL paid a marketing firm to mail library service questionnaires county-wide. The information in the survey was very helpful at the time. Patrons asked for the library to be open on Sunday, to access the library webpage

from home, and to build more libraries. Since then, all of these requests have been fulfilled. In 2012, budget limitations kept us from another direct mailing. So, the management team decided that the best way to hear the voice of our community – where residents wanted their library to be in five years -- was to set up interviews and focus groups with stakeholders. A stakeholder is any person, group, or organization that can place a claim on an organization’s attention, resources or output, or that is affected by that output. Ideally, all Forsyth County residents are our stakeholders. However, we narrowed down our focus groups to library staff, cardholders, civic leaders, our funding agency, and community organizations.



“continuums,” each continuum located between two “strategic vision” extremes.

The visions are not beginning and ending points. The reader considers where her library is on each continuum, and where she wants it to be. For example, the goal of a library is not necessarily to move from a “totally physical” library to a “totally virtual” library, but rather to determine what percentage of physical and

virtual materials and services it wants. On the second continuum, a library decides their future focus on individual users or on making the library a community gathering place. The same process is used for continuum three, a library of materials or a library where materials are created; and for continuum four, is the library a hub (portal) to other resources or is it a repository (archive) of all available information in a

selected subject field.

**How Do We Get There?**

At this point, the MT wrote a proposal to our library board requesting their approval to start the process of reviewing and revising the 2007 strategic plan. We explained the steps we wanted to take in gathering and collating the data. The board approved our initiative and asked us to present our recommended revisions to the board meeting in January, 2013.

We began the feedback process with our first focus group, our own staff. Before the annual FCPL Staff Day in October, we asked all staff to read part of a recent report, [Confronting the Future: Strategic Visions for the 21<sup>st</sup> Century Public Library](#) by Roger E. Levien, published by the ALA Office for Information Technology Policy. The report presents and explains four

The continuums are not mutually exclusive. A library can be a “totally physical archive,” or a “totally virtual archive,” and so forth.

At Staff Day, we scheduled an hour for staff to work in small feedback groups. Dividing the staff into sixteen groups of about six staff each, we gave each group a matrix of a specific vision from the four continuums, one for “strengths” and another for “weaknesses.” For example, we had one group for “individual focus strengths” and another for “individual focus weaknesses.” Each group filled out the matrix template, shown in Chart 2, leaving any topics blank that did not lend themselves to the assigned vision.

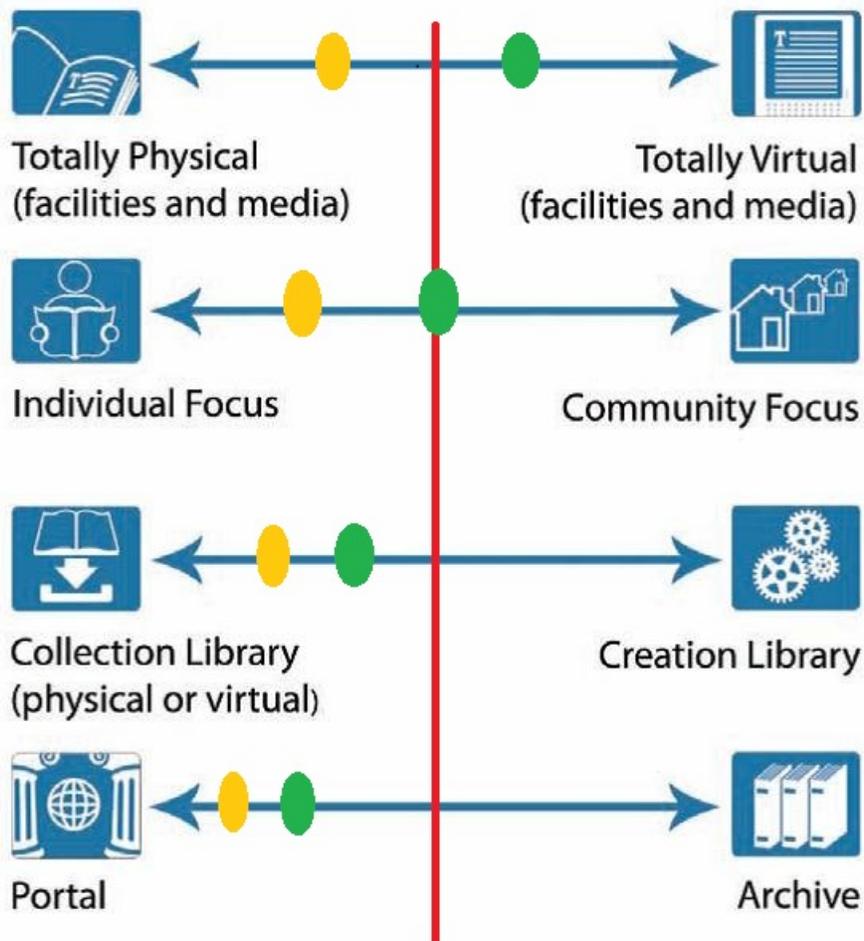
Here is the response for “totally physical strengths” (Chart 2):

<b>Strategic Vision Example: Totally Physical Strengths in Next 5 Years</b>	
<b>TOPICS</b>	<b>STRENGTHS</b>
Customer Service	Patrons can relate personally with “live” staff.
Materials	In 5 years, there will not yet be enough ebooks to convert the whole library to digital. Materials will still be on shelves, but probably there will be fewer than now, so plan for shelves to decrease. Patrons may continue to access a virtual collection in a physical facility as well.
Computer Technology	Tablets will rule. Whiteboards or other interactive group technology may be needed.
Facilities	With tablets and smaller physical collection size, we’ll have more room for soft seating and tables. This would lend itself to a community gathering place or interactive study groups.
Staff or Staffing	Can be largely self-service, with staff serving in a role of creator, researcher, trainer.
Mobile options	NA
Digital media / electronic products	Will be much more prolific, but users will still have to come to a physical building to access some of these.
Programming for all ages	Can be held in a facility close to people’s homes or work. Provides interaction among people not necessarily available online.
Training	NA

Responses from Staff Day were compiled and then given to staff to review. A month later, our supervisors met and, based on the Staff Day matrices, determined where staff thought FCPL was located on each continuum. Stickers were placed on a wall-sized version of the strategic visions chart. The orange dots on Chart 3 below

are where FCPL is presently. Next, supervisors placed stars on the wall chart where each one of them thought FCPL should be in five years, both personally and as representatives of their respective staff. Green dots mark the majority points of future responses.

Chart 3



From the staff and supervisors' input, we recognized that FCPL employees would not be comfortable with creation models, such as Maker Spaces, nor did they want to be a "warehouse" (archive). They were receptive, even enthusiastic, about expanding a virtual presence and finding more ways to become a community meeting space.

Meanwhile, management team members were interviewing other stakeholders. We had decided that all five department heads and the director should attend each focus group in order to answer specific questions from participants and to analyze feedback from departmental viewpoints. A total of thirty-one

participants were drawn from the following groups:

- Four patron focus groups included a mix of preschooler moms, young teens, single adults, and "boomers"
- Chamber of Commerce President
- School system Superintendent
- Administrator for Northside-Forsyth Hospital, the county's largest employer
- Nonprofits, including Literacy Forsyth and Mentor Me
- FCPL Friends and Advocates
- Representatives from Forsyth County Government, our primary funding agency

At each focus group meeting, we began with pre-arranged questions based on SWOT (Strengths, Weaknesses, Threats, and Opportunities, Chart 4).



**Chart 4, Strengths, Weaknesses, Threats, and Opportunities.**

Focus group questions included:

- *Strengths:* What does FCPL do well?
- *Weaknesses:* In what areas does FCPL need to improve? Is there anything FCPL is doing now that should be stopped?
- *Opportunities:* What opportunities exist in the community that can improve the public's perception of FCPL? How can FCPL best take advantage of these opportunities?
- *Threats:* What external factors affect FCPL negatively? How can FCPL best avoid or overcome these threats?

As participants became more comfortable responding to our questions, they asked their own questions and commented on the image and services of the library.

The feedback from these community leaders and patrons exceeded all of our expectations. We divided input into thirteen categories: E-books, User Experience, Facilities, Fines, our Friends group, Holds, Materials, Online Services, Outreach, Future Planning, Programs, Staff, and Teens. Altogether, we had over 400 comment entries in an Excel spreadsheet. Some comments we heard from multiple groups. Here are the top ten responses, in no particular order.

- "I didn't know you did that!" (Many participants asked for services that were already available. Message to us – promote what we have!)
- More adult programs.
- More children's programs.
- Restore hours cut due to decreased budgets. (No surprise there).
- "Don't get rid of the books!"
- More e-books and easier downloads and returns through Overdrive.
- Provide 24/7 remote book drops and holds pick-up locations.
- Keep the staff and don't replace them with technology. Recent additions of self-check machines met with mixed reviews. Most participants wanted both live and tech options.
- More hours to book our free meeting rooms. Many didn't know we had free meeting rooms!
- Complimented the new website updated in February, 2012

### Setting Priorities

At the annual management team retreat in December, the MT met with library board members. The board had received the staff and focus group comments ahead of time, which they had all read and studied. It was time to set priorities and begin formulating goals. To do this, it was necessary to employ strategic thinking, a planning process that applies

innovation, strategic planning, and operational planning to develop long-range goals.

According to *Five Criteria for the Strategic Thinking Process*, published by the Ohio State University Business Development Center, strategic thinking is like looking down at the world from an airplane. You can see much more than when you are on the ground. By viewing what some call “the big picture,” planners begin to see trends and patterns and to develop the best overall strategies, not just the obvious ones.

The board’s discussion resulted in 4 priorities.

- *Promote the role of the library in the community* — This was the board’s top priority, emphasizing the image of the library and its place in the Forsyth County community. It was based on the many comments from focus group participants who didn’t know what all we did, even if they had been patrons for years.
- *Maintain balance of the collections to stay relevant and in budget* —They wanted us to maintain an emphasis on print, but to add e-books as funds became available. They added their voice to many others who had said, “Don’t get rid of the books!”
- *High Tech / High Touch* (Balancing customer service with increased technology)—They didn’t want to lose our favorable reputation of excellent customer service, but also knew we couldn’t afford to sacrifice assistive technology for patron services. Although the library has not had a reduction in force due to budget cuts, some empty, full-time positions have been filled with part-time replacements. FCPL has incorporated self-checks as an alternative service method for a reduced personnel budget.

- *Make sure staff is supported to meet changes in their jobs* — All agreed that training was absolutely necessary to keep our staff knowledgeable, tech-savvy, and happy in their jobs.

It was also very helpful to us that the library board chose what *not to do now* that group participants had asked for. Based on our mission, and on a static budget, the board decided not to pursue 24/7 holds pickups and returns. Both would have required purchasing expensive equipment, and the board wanted us to use funds for more materials and more staff training.

After the meeting between the library board and the management team ended, the MT began the process of integrating the board’s priorities into a structured strategic plan, adding strategies under each goal.

Finally, we were ready to come to the library board with our completed strategic plan. Here is what was presented and approved on January 27, 2013.

### **Strategic Plan 2013 – 2018 Forsyth County Public Library (FCPL)**

Goal 1: Establish the library as a civic focal point and resource hub.

- 1) Increase awareness of the library’s programs, services, and resources.
- 2) Increase the number of partnerships with Forsyth County organizations to enrich and expand community relationships.
- 3) Promote the library as the first and best source of life-long learning.

Goal 2: Develop relevant and inspiring collections that meet Forsyth County’s evolving needs and expectations.

- 1) Select and maintain high-quality popular and informational collections.

- 2) Sustain a balance between traditional and electronic collections.
- 3) Increase funding to support FCPL collections.

Goal 3: Provide a High-Tech / High-Touch approach to serving the community.

- 1) Develop technology that makes the access of knowledge and ideas easy and intuitive.
- 2) Make library facilities premier locations in Forsyth County.
- 3) Provide personal, exceptional service.

Goal 4: Encourage and support all library staff to be an engaged and energized workforce.

- 1) Provide training to increase the proficiency of library staff in their job responsibilities.
- 2) Foster an organizational culture of innovation and involvement.
- 3) Help staff to readily adapt to change.

Although the board's approval marked the end of the strategic planning process, it marked the beginning of implementing the new plan. In our next MT meeting, we began the task of adding projects under the strategies and charting our course for the years to come. These projects provide the "operational planning" mentioned in the definition of strategic thinking. As Wayne Gretzky said, "I skate to where I think the puck will be." That's what our projects are – a way to skate to our long-range goals.

Already, plans are underway to re-allocate staff to provide more support for children's programs in the branches. Programming staff who had been based at headquarters are now located in the branches, and Information staff members have been reassigned to youth services. A new program manager was hired to oversee programming for adults and children.

The management team is considering how to increase advocacy in the community. We have

compiled a list of agencies to approach for partnerships. We are cooperating in a new program with the public school system called iRead, iCreate, iShare, which encourages students to create video book trailers. We are also working closely with Literacy Forsyth to present programs that enhance family literacy, such as a digital storytelling camp for English as a Second Language high school students.

One take-away from this intense planning process was the intention to schedule focus groups at least once every year. It has been a great way to know what our community expects of its library.

Did we accomplish strategic planning and thinking? Is this new plan a long-term road map, a big picture view? Does it contain innovative ideas? Is it reflective of the wishes and wants of our focus group participants?

Yes, we think so. The new plan is a challenge to us, but it gives us a solid platform for keeping what we already do the best and finding ways to implement innovative new services.

#### Resources:

Bryson, John Ad. 1988. "A strategic planning Process for Public and Non-profit Organizations." *Long Range Planning* 21 (1): 73 - 81.

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