

Strategic Planning: Table and Timeline

Updated: February 2023

The Strategic Planning: Table and Timeline gives libraries an overview of how to accomplish creating a strategic plan for the library and how long the process should approximately take. This document is meant as a guide, but each library director and strategic planning committee should determine what will work best for their individual library.

The “done” column gives the library an area to track if they have completed the action items listed.

The “action item” column includes a brief description of the action items. A more thorough description can be found in the Strategic Planning Checklist document.

The timeline gives an approximate idea of when each action item should be completed. This is approximate and flexible.

Step 1: Pre-Planning and the Planning Team

Done	Action Item	Timeline (approx.)
	Create a strategic planning team or committee and choose a chair that will lead the process, such as the library director or board chair.	Month 1
	Create a list of community organizations to include in the strategic planning process.	Month 1
	Discuss process and expectations for outcomes and lay out a projected timeline of the project.	Month 1
	The facilitator will review key documents.	Month 1

Step 2: Data Gathering and Community Input

Not every library will use each data gathering tool. The strategic planning committee should determine what will work best for the library.

Done	Action Item	Timeline (approx.)
	Gather library data and trends for the last 3 – 5 years.	Month 1 and 2
	Gather US Census data and updates and the companion American Community Survey for demographic information.	Month 1 and 2

Step 2 (Cont.): Data Gathering and Community Input

Done	Action Item	Timeline (approx.)
	Conduct a community survey.	Month 2 and 3
	Conduct a staff survey online.	Month 2 and 3
	Synthesize and analyze survey results.	Month 3
	Hold key stakeholder interviews with the members of the governing or funding body and leaders of important community groups.	Month 2 and 3
	Invite individuals or groups to participate in focus groups.	Month 2
	Hold focus groups.	Month 2 and 3
	Present summary survey report.	Month 4

Step 3: SWOT Analysis

Done	Action Item	Timeline (approx.)
	Using the data collected in Step 2, complete a SWOT analysis with strategic planning committee.	Month 4

Step 4: Creating the Strategic Plan

Done	Action Item	Timeline (approx.)
	Draft the strategic plan.	Month 4
	Finalize and approve the strategic plan.	Month 5
	Create a goal tracking worksheet to track the progress of the strategic plan goals.	Month 5

Step 5: Implementation Plan

Done	Action Item	Timeline (approx.)
	Facilitate and draft the implementation plan.	Month 5

Concluding the RRP Process

Done	Action Item	Timeline (approx.)
	Follow-up with the strategic plan stakeholders.	Month 6
	Spread community awareness and market the plan.	Month 6