

# Alberta Community Development Strategic Information and Libraries Branch

## The Planning Process A tool for better library service

### Introduction

The Planning Process has been around for nearly twenty years. It started with *A Planning Process for Public Libraries* published by the American Library Association in 1980. This was quickly followed by *Project Progress: A Study of Canadian Public Libraries* by the Canadian Library Association in 1981 and by *Output Measures for Public Libraries: a Manual of Standardized Procedures* by the American Library Association in 1982. The key concepts were incorporated into **The Libraries Act, Chapter L-11 RSA 2000 and the Libraries Regulation.**

We also highly recommend that the board and staff look at the ALA book: *The New Planning For Results: a streamlined approach* by Sandra S. Nelson. Published 2001 by ALA.

### Changes to the Legislation

Prior to the 1998 revision to the *Libraries Act*, there were different due dates for each portion of the planning process. This was done to ease library boards into a planning cycle. It also helped boards deal with what seemed like an overwhelming task. Since 1988 all library boards, except those most recently established, have completed at least two cycles of the planning process. Library boards are now on a maintenance schedule.

Regulation 40 (c) of the Act states that "The Minister may make regulations...respecting the planning for, and provision and management of, library services." This is further explained in The Regulation. The three elements of a plan of service: needs assessment, goals and objectives and an action plan are now submitted as a complete package. The Legislation allows boards to set their own schedule for revising the package. A board may submit its plan of service package every three to five years.

### Why have a plan of service?

As the Cheshire Cat said to Alice, "... if you don't know where you are going, how will you know when you get there?" A plan of service is a guide for getting the library to where it wants to be in three to five years.

A plan of service is very useful to keep libraries on schedule with their local development. It also helps boards and staffs identify and respond to the changing needs of the community. A plan of service can get the message to the local council that the library is an essential service in the community. It is an accountability tool.

### Partners in the planning process

Responsibility for the plan of service does not lay with one person. It is a joint effort among the board, staff and the public. Each has a special role to play. The board establishes the general direction. The staff are key players in developing the time frame. The public is critical, because

if the plan is not being developed to service the public, who is it for? The roles are not mutually exclusive. Each contributes to the other. Below are more details on the specific workings of each group.

## Needs Assessment

Volumes have been written on needs assessments from all angles. The Libraries Branch published one in 1987. The basics still apply to the task. Below is an overview of that Needs Assessment Handbook for Public Libraries, Volume One.

Volume One is designed to provide information on three basic needs assessment methods. These methods will help library boards to assess community library needs as simply and inexpensively as possible by tapping readily available information and the diversity of opinion and knowledge held by local citizens.

Knowing what the library needs are in the community allows the library board to put the resources available - people, money, materials - to work where they will do the most good. And while the board is finding out about the community's library and information needs, the community is finding out more about its public library

### **Needs assessment when you haven't got a clue.**

Needs assessment is simply a way to measure whatever gap there is between what exists now and what is needed. For a public library, this means three things are required:

- A profile of the library to indicate what library materials and service are provided now,
- A profile of the community that the public library is there to serve, and
- A careful comparison of the two profiles.

If the two profiles fit perfectly together, like pieces of a jigsaw puzzle, then there is no gap between what is and what should be. But if the profiles only match in certain spots, the gaps that show up indicate possible unmet needs in your community for library services. On the other hand, any overlaps on the profiles could point out possible duplication of activities where the library board could consider phasing out some unneeded library service.

A library board must know how the service it provides fit what the community needs before the board can plan or decide on action steps. Small libraries in communities located close together could consider doing joint needs assessment or coordinating their activities to avoid duplication. This could result in more information at less cost to each individual library.

There are three relatively simple and inexpensive methods your board can use to assess the community's library and information needs.

- **Records and Data** - Examining available information to gain facts about the library and the community.
- **Focussed Small Group Discussions** - Asking people for information and ideas about the library.
- **Touch-Base Interviews** - Getting in touch with the community by talking to key individuals and groups.

These methods can help the board become more aware of the community and its library needs. There are also explanations of how the board can use this increased awareness to plan for the

library's future. Your board can do needs assessment by planning to have the board and the staff stop, look, talk, and above all, listen - to what people say if you ask them.

Spread the word that the library board wants to know what the community thinks about its library. Then let people know what was learned and what will happen as a result. Get people involved and interested, and the public library will become more visible in the community than ever before.

### **Records and Data -Don't reinvent the wheel**

Your library board is looking for clues to community library needs. What to do? Before the board does anything, it should look to see what is already known about the community and the library. In this age of information, records and data are everywhere. Federal, provincial, and municipal government departments do studies, gather facts, and make plans, much of it having to do with your own community. When you begin to look, you will find a multitude of information sources about your community even before consulting local organizations or your own library records.

A systematic gathering of information by looking at available records and data may be the only method of needs assessment your library board uses. Or you may use the records and data to gather background information, as a base on which to build a more extensive needs assessment project. In either case, an investigation of records and data will yield a lot of facts useful in building community and library profiles. Four broad categories of records can be studied for pertinent information. These are:

1. Census statistics
2. Municipal data
3. Studies and plan
4. Library records

1. **Statistics Canada** conducts a complete census every ten years and a minor census at the five year mid-point. The last federal census was done in 1996 so a minor census was conducted in 2001. Information from these censuses is available in the form of a census profile of your municipality. Statistics Canada's website is

<http://ceps.statcan.ca/english/profil/PlaceSearchForm1.cfm>

You can find out, not only the total population, but how the people living there are divided by age, sex, ethnocultural origin, and highest level of schooling. Occupations, average income, marital status, and types of dwellings are other facts gathered by the federal census and included in the census profile.

2. **Municipal Data** exists and can be searched for clues to your community's profile. Contact your municipal office for information about transportation patters, employment conditions, number and types of businesses, zoning regulations, or planning forecasts.

Some of this information can be found on local municipality's websites. Easy access to many of these sites can be found on Alberta Municipal Affairs homepage, which has links to municipal homepages and community profiles: [www.gov.ab.ca/ma](http://www.gov.ab.ca/ma) or try [www.munimall.net](http://www.munimall.net).

A high unemployment rate, for instance, could indicate a need for books on resume writing, job training or career planning. Transportation patterns may indicate where a library could be located to be most visible in the community.

Local organizations such as the school board, Chamber of Commerce, or historical society have information on other aspects of community life. Find out what groups exist in the community and what their purposes and activities are. Look to see where people live, work and take part in leisure activities

Also look for evidence of what other educational, recreational, cultural and social services are available. The yellow pages in the telephone directory are a good source of information about any community, listing companies, services organizations and government offices.

Community organizations bring together people with common interest. Becoming aware of these interests will allow the library to zero in on the services and materials it could provide to groups such as the gardening club, the field naturalist society and the Girl Guides. Examining all these sources of information in your municipality will help your board answer such questions as:

- What kinds of businesses are located in the community? What kind of information might they need from the library?
- How many students are there? What ages and level of schooling? What demands do they make on the library? Do the teachers need help that the public library can give?
- Are there adult education programs offered which might cause a demand for library materials or services?
- What organizations or clubs do people belong to and what resources could the library provide to support their interests?
- What other sources of information are available in the community?
- Are there people with special economic or social circumstances in the community such as single parents, unemployed, institutionalized, or highly mobile workers?
- What community services are available for young adults?

**3. Studies and Plans** - An incredible array of studies and plans have been done by government departments, planning commissions, community organizations and other libraries. The resulting information is almost always available at little or not cost. Some provincial departments that have local community information include Alberta Learning, Alberta Community Development, and Municipal Affairs. Each of these has conducted at least one relevant study. Any provincial government department can be contacted for information they may have on your community. Other useful sources of information include:

- *Regional Planning Commission* for your area may be able to supply information on trends, forecasts, or future plans in such aspects as population growth, transportation or industrial changes, or shopping patterns.
- *Alberta Community Development Field Offices* can put you in contact with community people you might not be aware of, supply handbooks for reference and provide information on possible funding sources.

Each community is as unique as a set of fingerprints, and every community has left a lot of fingerprints around during its history. Consulting the records and data already available will yield a wealth of information about your community's profile.

**4. Library Records** - Consulting the records which are available about your library's materials and service will allow the library board to draw up a profile of how the library is presently meeting community needs. It will also allow the comparison of your library with other libraries serving communities of similar size.

Performance measures are important tools in the development of a service plan and also in marketing and lobbying.

Statistics that can be collected and used in the library profile include:

*Collections* - Books - total number; total (fiction and non-fiction by age groups, adult, young adult, children; reference books

Non-print items - number and type

Subscriptions - magazines and newspapers

*Usage* - Circulation can be broken down in various ways such as by subject or daily totals:

Registered library card holders - adults, children  
Reference questions asked - in person, by phone, type of question  
Materials used in library - materials left on tables  
Interlibrary loans  
Programs offered - attendance  
Special service - handicapped, shut-ins, films, toys, photocopiers and computers for public use, multilingual collections and other services  
Hours open per week - days open week

*Staff* - Totals - part time, full time, salary levels, and qualifications

*Budget* - Money spent on staff, equipment, materials; totals for each; percentage of total budget for each.

After deciding what statistics will be collected, a form can easily be designed to record that information. Other good sources of information about your library are calls or letters from the public; suggestions if you have suggestion box; board minutes; and the library's annual reports. Comparisons can be made of the current year's activities with past years and with other libraries. Public Library Statistics is available from Alberta Community Development.

### **Focused Small Group Discussions**

The records and data you can examine will yield a lot of "hard" facts and figures. The focused discussion method brings out "soft" information about community attitudes - how people feel and what they think about the library. Gathering both kinds of information is important in producing community and library profiles.

Focused small group discussions can be used with the board, the library staff, community members, or combinations of all these groups. After an explanation of the method, we will talk about how the method might be used with different groups.

What is it? Focused small group discussion is a method which helps a group of people analyze a problem by focusing on one specific question or problem. The method brings together a varied group of people and encourages different opinions to emerge by using a systematic approach to discussion of the problem.

A group of seven or eight people meet around a table in a room free of distractions. One person acts as the group leader. This does not have to be the official group leader, as for example, the board chair. This person may also act as the recorder. Each person should have paper and pencil, and a whiteboard or flip chart should be in view of everyone in the room. A clearly worded question or problem, which has been previously decided on, will be the focus of the group's discussion. This statement or question may be on the flipchart or whiteboard.

Although this is a discussion method, the process begins with a minimum of discussion. The group leader explains what will happen during the meeting, states the question and gives the necessary instructions. Each person is asked to begin by individually writing down on the paper provided all the answers that person can think of to the stated question. At this time, there is no discussion within the group. The emphasis is on individual concentration.

At a time specified at the beginning of the exercise:

- the leader asks each person in turn to contribute, without discussion, one idea from his or her list of answers.
- the recorder writes each idea on the flipchart or whiteboard clearly and concisely, using the contributor's own words wherever possible.

- when each group member, including the leader and recorder if they want to participate, has contributed one idea, the process continues until every item on each list has been mentioned and recorded in front of the group.
- No discussion of the suggestions takes place until the recorder writes all down. Now in front of the group is a large list of ideas, which have been given as possible answers to the stated question. Discussion begins as each idea is examined in a systematic order. Participants may ask for clarification of the ideas and points for and against any given idea that may emerge. This will help the group members to make decisions when asked to do so in the process that follows.

When each idea has received careful attention and seems to be clearly understood by all group members, voting takes place. Each person writes down and privately rates the entire group's ideas using an agreed-on rating system. The rating system should be simple. For example, if number 1 is the highest priority, then all ideas are ranked by number down to the idea, which is considered to be the least important. This will have the highest number.

When everyone has numbered every item on the group list, the results can be tallied. The individual anonymous lists can be gathered up and tallied later or, the group can tally if time and energy allow now. In either case, the ideas are listed down the left side of a page while across the top flow the numbers used in the rating process.

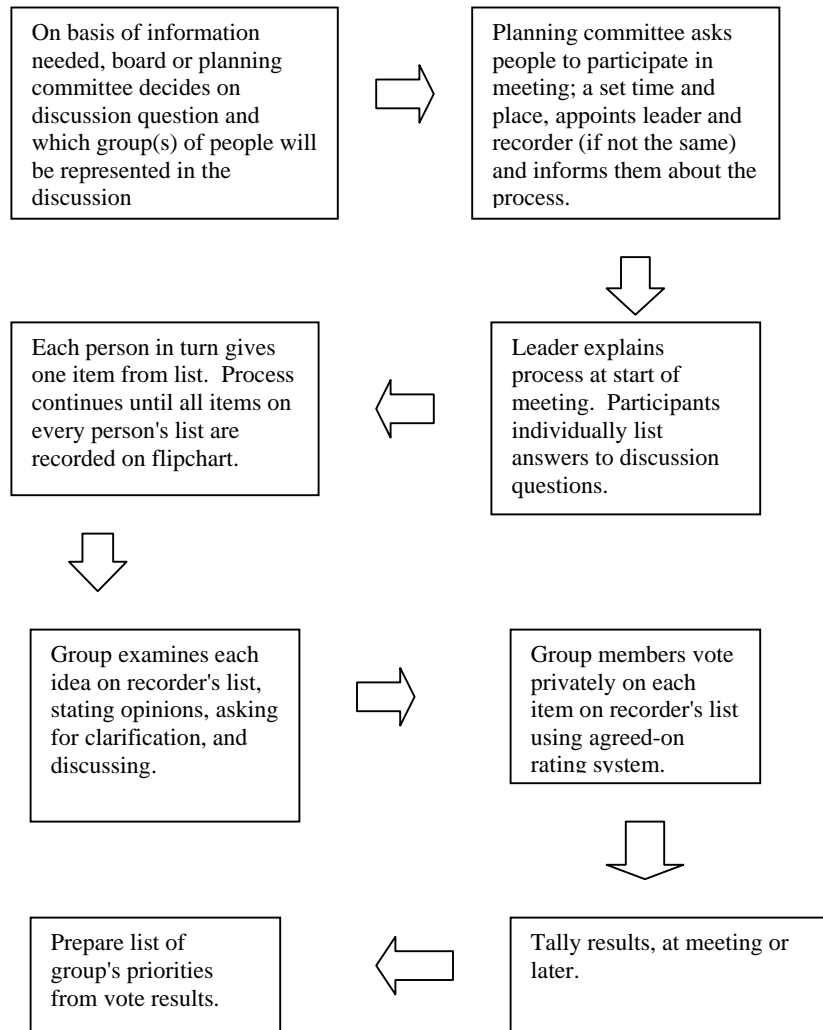
|                              |   |   |   |   |   |
|------------------------------|---|---|---|---|---|
| Population totals            | 1 | 2 | 3 | 4 | 5 |
| Growth rate                  |   |   |   |   |   |
| Age groupings                |   |   |   |   |   |
| Special interest groups      |   |   |   |   |   |
| Library circulation          |   |   |   |   |   |
| Why people use library       | 5 | 2 | 0 | 1 | 0 |
| Why people don't use library |   |   |   |   |   |

All responses will be entered on this form and total added up for each item. This is done by multiplying the number of votes in each numbered column by the column number itself. In the example above, "Why people use the library " has:

5 votes as # 1 information priority = 5 points  
 2 votes as #2 information priority = 4 points  
 1 vote as #4 information priority = 4 points  
 TOTAL 13 points

So the final total for this item on the list is 13. The item that ends up with the lowest final total emerges as the group's highest priority. When all items have been totaled, a new list can be prepared with the highest priority at the top. The list can then be used as part of the decision making process because it is now clear what information the board as a group wants to gain from the needs assessment.

### Focused Small Group Discussion Flow Chart



**Advantages of Focus Groups** - The firm structure of this focused small group discussion method leads to several advantages:

- One strong person cannot dominate the group
- Every person makes a contribution because of the individual listing and voting
- Because ideas are all written down, none are lost as sometimes happens with entirely verbal discussions
- Voting by ranking the choices leads to a more objective group decision
- Discussion of each item in turn assists everyone to understand the points under consideration
- The process both generates information and suggests solutions

This process uses several people working together and exchanging ideas and information to work on a problem. When used to involve people from the community, it provides the added benefit of increasing public awareness of the library.

One disadvantage to be aware of, particularly when the method is used to get community input, is that because numbers in the group are necessarily limited, caution must be used in using the results as representative of the entire population. Any possible bias may be at least partially overcome by conducting several focused small group discussions on the same questions.

**How to Use It** - As mentioned earlier, this method could be used with board members, library staff, members of the community, or combinations of these groups. In the needs assessment process, the focused small group discussion can be used at several levels to accomplish different purposes.

In the example above, a library board used the method as part of the planning process for the needs assessment itself. A board could also use it to weigh the results of the investigation into community needs when the board is setting priorities for a library plan of action.

A staff group could use the method with equal effectiveness, as the advantages apply no matter who makes up the group. It gives the people who work in the library an opportunity to express their ideas in areas of concern to the library and the community.

The priorities that come from a staff focused discussion can be compared to those that emerge from board and community sessions. A discussion group with both staff and board members participating can be a valuable learning experience for all and yield valuable information due to the interaction of diverse points of view about the library

The involvement of people from the community in this directed discussion process is also very valuable. A group of library patrons could be asked to discuss: "Why people use the library." Another possibility is to ask some people who do not use the library to take part in considering the question: "Why people don't use the library." Another groups might identify: "What are the strengths and weaknesses of the library in this community?"

The possibilities are endless for involving the community. Depending on what kind of information the board needs for its planning process, the focused discussion groups could be made up of citizens at random, senior citizens, young adults or businesspeople. The list could go on and on.

### **Touch-Base Interviews** - *Getting in touch with the community*

Another way to involve the community and build support for the library is by keeping in touch with key individuals and groups in your community. One good way to do this is through touch-base interview with these community leaders. Although this process can be a valuable supplement, the method should not be the only or major source of information to the board in undertaking a needs assessment. An interview can be defined as a serious conversation with a definite purpose. A good interview, therefore, starts with a clear understanding of its purpose. So why use touch-base interviews in the planning process?

Mostly because a community is not made up of the "general public" although we often think of it that way. Instead, a community consists of many "key publics." These are individuals or groups that might affect or be affected by the library now or in the future. Touch-base interviews provide an opportunity to involve these key publics in library planning. The interviews accomplish two basic things.

1. They provide a way to check out community attitudes and knowledge about basic library issues. How much do these individuals or groups know and how do they feel about the library and its services? Is the Chamber of Commerce aware of what informational services the library can provide for businesses? What opinion does this organization have on what services should be

offered? How aware is the municipal council of the diversity of services and materials offered by the library? This may well affect budgetary support.

The interviews are also a good chance to check out public expectations as well as agreement or disagreement about basic issues affecting the library. Keeping in touch with the community opinion leaders brings to the surface unmet expectations for public library service and may result in unexpected ways to serve the community. For example, the municipal council may view money spent on school and public libraries as duplication of services. If this attitude surfaces during a touch-base interview with a councilor, the library board can plan to overcome the objection. As a consequence, both the public and school libraries may become more effective.

2. A very positive effect of holding touch-base interviews is an increased awareness of available library materials and services. It is a public relations tool and its effectiveness cannot be over emphasized. The very fact of asking for opinions on basic issues increases public library awareness. Asking senior citizens if it is more important to increase the size of the video collection might result in a new awareness of the library's collection of "golden oldies" videos that can be borrowed.

Questions like these are good public relations for what is already available at the library each person interviewed become a source of knowledge about public library services to the group he or she represents and to other individuals.

### **Who's involved?**

*Who should be interviewed?* - The library board should identify (possibly through the focused group discussion process outlined above) groups, organizations and opinion leaders in your community. From this list, choose the key public who have the greatest actual or potential for having an effect or being affected by the library. These publics are sources of people for the touch-base interviews and may include such groups as:

- Public library board and staff
- Municipal council and staff
- School board and staff
- Other municipal boards - Culture Board, Recreation Board, Family and Community Support Services Board
- Influential groups - Chamber of Commerce, Agricultural Society, service clubs, senior citizens clubs, Women's Institute
- Influential persons (opinion leaders)
- Media - newspapers, radio stations
- Other libraries in the community

*Who should do the interviewing?* This very much depends on the local situation. Because it is the library board that will be using the input from the interviews in the planning process, a strong case can be made for library board members to do at least some of the interviewing. Other options include using volunteers to do the interviews. Friends of the Library or community service might take it on as a service project. These could be people from the community who are hired and trained in interviewing or consultants experienced in this area. For smaller libraries, as suggested recommendation would be library board members first, then volunteers, and paid interviewers as the last choice. The time and money available for the process must be considered in making the choice of interviewers. Individuals inexperienced in interviewing will require training no matter which of these groups they belong to or why they are doing the interviewing.

*When and Where? What to Talk About?* The Needs Assessment Planning Committee that the board has set up to organize the project should set a timeline for conducting the entire needs assessment. The interviews should be conducted during the designated time for data

collection. The art of interviewing is a subject about which much has been written. Many books and articles are available for more in-depth information. However, a few very basic things to think about for successful interviewing are included here.

The specific time and place for the interview to be held should be set for whenever and wherever is convenient for both parties. The interview can take place in the library - a good way to get people to see what's happening there - or in private homes, offices, or coffee shops. Conditions that will add to the success of the interviews are comfort, privacy, and especially, freedom from interruptions. A specific amount of time should be set for the interview so there will be no misunderstanding about how much of the interviewee's time is required. This will depend on how many issues will be discussed during the interview.

What will be discussed should be decided before any interviews take place. Discussion issues and suggested working for questions are too important to be left to chance. No matter who is doing the interviewing, the Planning Committee must decide ahead of time which issues will be discussed. The issues should be those which are of concern to the board and which the board needs information on. Some examples of basic issues that could be included are:

- What non-print materials should be available?
- Should the library be involved in programming?
- What should the library do more of?
- What should the library do less of?
- How can public and school libraries co-operate with each other?
- How do people learn about the library?
- Why do people use/not use the library?
- How would a system enhance our service delivery?

When the issues and questions are standardized, the information gathered is much easier to put down in a way, which will yield useful data. A procedure for recording and reporting interview results must be set up for all interviews so the valuable information gained will not be lost. After the interview, the interviewer should set aside time to put down either in writing or on tape the results of the interview. In this needs assessment method, as with all others, everything that happens should be written down. Interviewers should be carefully instructed to write down not only the results but the who, when and where and how long of the interview.

**Remember...**Interviews are a way of touching base with the community. The two-fold purpose is to encourage expression of views, pro and con, on basic issues affecting the library and to promote awareness of the library's services and materials. The actual number of touch-base interviews conducted will vary with the size of the community and the local situation. Take it step by step:

1. Identify basic issues concerning your library and develop the interviews around these issues.
2. Select people to be interviewed from key publics in the community.
3. Record the evidence so the board will have a trail to follow.

### **The Evidence Is In**

Up to this point all activity has been in the information gathering stage which is the necessary first step in the planning process. The Needs Assessment Planning Committee should have been submitting regular reports to keep the board and staff up to date on everything that has happened. No matter what method is used, accurate record keeping is essential to the success of the project. That becomes very evident at this stage when the board is ready to plan.

Now it is time to decide what action should take place as a result of the information you have.

If nothing happens as a result of the needs assessment the board has done, then the information gathering was a waste of time and effort.

Even worse will be the effect on the members of the community of asking what they think and then ignoring their comments.

Publicizing the needs assessment process from the very beginning is good public relations for the library

The community becomes involved and interested in the results. So make sure the results are visible. In this section, we will discuss three steps, which will enable your board to make effective use of the information you now have.

1. Compare your library and community profiles
2. Set goals and objectives
3. Prepare an action plan

## COMPARING PROFILES

The whole board together in preparation for setting goals and objectives can do this step. The other alternative is to have the Needs Assessment Planning Committee do the comparison and present a report to the board. If the second route is followed, the report should be received by each board members well in advance of any meeting held to discuss the report or to set goals and objectives. In preparing the profiles comparison, the factual data you have gathered about both community and library should be assembled in an easy to understand format and distributed to all individuals who will be assisting with the comparison process. One use of the "hard" data is to make calculations, which will enable the board to compare the library with your community as well as with libraries in communities of similar size.

At this point, for example, you can find out how many books per capita are held by the library as well as the annual circulation per capita. If you have population figures broken down by age groups and the library circulation broken down into adult, young adult, and/or children's circulation, then you can also figure out the circulation for the different age groups and compare that to the percentage of each age group in the community. In this way, you are beginning to build a picture of how the library operations match the community. I, for instance, approximately 25% of the population is age 14 or younger but the percentage of the total library circulation to that age group is 10%, this could indicate to the board an area of unmet need.

In addition, it can be very informative to compare the books and circulation per capita figures with other libraries. Comparative statistics are available through reports submitted by individual libraries and compiled each year by Alberta Community Development. The title of this publication is **Public Library Statistics**. It has information on each library such as total book stock, population, circulation, and expenses by category including salaries, materials, administration, etc. The statistics are arranged by size of municipality. This allows quick and easy comparison with libraries in towns of similar size.

It can also be useful to compare your own library and community statistics for the last five years. Has the population grown and by how much? Has library use increased along with the population or perhaps increased even with less people in the community? If you sought input from the community during the needs assessment process, this information must also be analyzed. It is more difficult to do this but just as important.

The prioritized lists resulting from the focused small group discussions can be examined for information, which will help the board in planning for the future. Are there any themes, which emerge? For example: Do the lists indicate a high priority placed on any type of service or

material such as books in other languages, children's story hour, or services to any specific age group? How do these priorities match up with available library services?

If people are asking for services already offered by the library, it may indicate more public awareness is needed rather than additional services. Similarly, the content of any touch-base interviews should be examined: What major concerns have been raised? Do the key individuals and groups have a realistic picture of the public library? What expectations does the public have for the library? Can they be met?

Make a list of major themes that are found in the interview information so that the board can plan to address them in future planning. A more complete picture of how the library is meeting or not meeting community information needs will begin to emerge. In this comparison of library and community profiles lies the seed of future planning. A thorough examination of the information will yield much food for thought. Do not neglect this step as it *crucial* to the planning process and particularly to the step that follows.

## SETTING GOALS AND OBJECTIVES

The entire board should take part in this vital part of the planning process. The board's responsibility as a board of management is to decide on directions and priorities for the library. Of equal importance, however, the board must recognize that it is the staff's responsibility to carry out the board's policies and plans. It is crucial, therefore, that the board allows a time and place for consultation with staff during the process of setting library goals and objectives. Out of the information resulting from the data gathering and the discussion of the profile comparison report comes a sense of what directions the board want the library to take in the short term and in the long term. Goals and objectives can be set for both the immediate future - up to one year- and for a longer time frame of up to five years ahead.

Confusion often exists over the differences between goals and objective and how they are written.

**Goals** - A **goal** is a broad statement of what the organization intend to accomplish a general direction in which to proceed.

**Objectives** - An **objective**, on the other hand is a statement which tells us three specific things:

1. What will be different?
2. By when?
3. How will the results be measured?

*Example:*

GOAL: to increase library service to the homebound and institutionalized.

OBJECTIVE: to double the number of volunteers delivering books to the homebound by December 2003. Results to be measured in report to the board.

OBJECTIVE: to provide rotating deposit collections in nursing homes and hospitals by June 2005. Results measured in report the board.

Remember that the goals are broad but achievable statements of intent, and the objectives are specific ways of accomplishing the goals. An objective states what will happen, within what time frame, and includes how we will know when it is achieved - a measurement of documentation of success. An objective should be written in the following format:

To \_\_\_\_\_ by \_\_\_\_\_ as measured by \_\_\_\_\_.

The real test for an objective is: Can those who didn't write it easily understand the objective?

The establishment of goals and objective identifies the board's priorities for the future. When planning, the board should try to be realistic about what accomplishments are possible within a

given time. The staff should try to be realistic about what accomplishments are possible within a given time. The staff should be consulted about timing and about the effect that suggested activities might have on the present library system and services. This careful thought process makes possible the realistic allocation of available resources in the next planning step.

## PREPARING AN ACTION PLAN

This is the "how are you going to make it happen?" stage of the planning process. For each stated objective, an action plan should be prepared. This will state:

- what will happen
- by when
- what money, materials and manpower are required
- specifically, what person or group will be responsible for carrying out the action plan?

In one of the objectives above, the action plan would include the following information.

- "Ten volunteers from the community will be recruited and trained by December 2005 to deliver books to homebound readers.
- A budget allocation of \$\_\_\_\_\_ will be required for advertising and preparation of training materials.
- The Chief Librarian will be responsible for the recruitment and training of the volunteers and for reporting to the board on or before the set deadline.

If preferred, this can be set up in the form of a chart with appropriate headings. The goals, objectives and action plans set by the board should be reviewed regularly. A brief report on the progress made toward each goal and objective should be given at scheduled intervals. This should be every six months or at least once a year.

A regular review allows the board to check on the progress of planned activities and also allows changes to be made as time progresses. Flexibility must be allowed for as plans and priorities can change. But the board's goals, objectives and action plans serve as directional signs to help the board and the staff guide the library in the desired direction.



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