

PLANNING AND EVALUATION

Every public library in New York is required to have a written long range plan of service. There are many excellent publications on planning. Some, such as the Public Library Association's *Planning for results; a public library transformation process*, are specifically library-oriented. Others, such as the *Drucker Foundation Self-Assessment Tool*, are more generic but still extremely useful. The conscious decision to engage in planning is far more important than the planning tool used.

Every plan has the same general components. The **mission** is a short, carefully crafted statement that tells the world why the library exists. What is the library's business? One writer has suggested that the mission statement should be concise enough to fit on a t-shirt! **Goals** are broad statements of program intent that support the mission statement. They are measurable only to the extent that they provide targets toward which to strive. There is always more to do to reach a goal! **Objectives** are specific, measurable, tasks or projects in support of a goal, usually stated in terms of outcomes. **Action steps** or **activities** are the specific assignments that must be completed in order to reach an objective. Finally, every good plan should come full circle with an **evaluation** process.

Every trustee, and the entire library board, must be prepared to ask difficult, searching questions about the library's goals and objectives, programs and services, and the board itself. What are the objectives of this library? Have they been accomplished? Are they appropriate? Is the community well served? How do we define good service? Does the director manage the library properly? Is the board functioning effectively? What do we want our library to look like in the future?

Evaluation looks at the past. It is an assessment and a measurement of activities that have already occurred and it provides a foundation for thinking about the future. Objective measurement, supplemented by subjective, anecdotal information, can help the board decide if its objectives have been met. However, it is important to measure the right things, and conversely, it is a waste of time to measure things that don't matter. For example, library circulation is a traditional measure of library use but it is only one small part of the activity in a library. What other things should you measure so you have an accurate picture of the way your public uses your library? These might include in-

house use of materials, Internet sessions, number of database searches, program attendance...whatever is appropriate for the service package your library offers the community.

Planning prepares for the future. **Strategic** planning is based on the premise that change is necessary to survive and thrive in the future. Strategic planning

Creating a plan involves answering questions:

- What is to be done?
- Who is responsible and who should be involved?
- How will it be done?
- What is the timetable?
- What resources (people, money, materials, etc.) are available?
- Who are the stakeholders in the process?
- What is to be reported to whom, and when?
- What options are available?
- How will we know if we are successful?

answers the question, “What do we have to do now in order to improve our ability to operate five years in the future?” If your unlikely conclusion is that strategic initiatives are not necessary, or if your planning time frame is shorter, you will be involved with **operational** planning. Operational planning focuses on the improvement of things your library already does, and it is primarily concerned with the allocation of resources.

Comparing your library to others with similar budgets or service populations can be a useful planning activity. The Division of Library Development publishes the annual *Public and Association Libraries Statistics*, a compilation of financial and service statistics for

every library in the State. The National Center for Education Statistics publishes comparable summary data from the entire country in *Public Libraries in the United States*. The Public Library Association publishes the *Public Library Data Service*, with statistical data on several hundred public libraries, by name, across the country.

At times a library board may have a need to conduct extensive and rather specialized planning for such complex activities as building construction or the automation of the library. Such projects may exceed the board’s collective skill and experience, making it advisable to call on the library system or outside consultants for assistance.