



**Planning and Evaluation**  
*[Handbook for Library Trustees of New York State](#)*  
**Post-Session Toolkit for Boardroom Discussions**

**Book Club Reading:**

*Handbook for Library Trustees of NYS, Planning and Evaluation* (Pages 59 - 61)  
Co-Authors Jerry Nichols & Rebekkah Smith Aldrich

**Additional Resources:**

- Libraries Transforming Communities [American Library Association],  
<https://www.ala.org/tools/librariestransform/libraries-transforming-communities>
- Outcome-Based Evaluation [New York State Library],  
<https://www.nysl.nysed.gov/libdev/obe/bestprac/examples.htm>
- Public Library Statistics [New York State Library],  
<https://www.nysl.nysed.gov/libdev/libs/index.html#Statistics>
- Planning and Evaluation [Mid-Hudson Library System],  
<http://midhudson.org/topics/trustees/#Planning>
- Webinar: The Role of Trustees in Planning [New York State Library],  
<https://meetny.webex.com/meetny/lsr.php?RCID=8096571dba2f41688c7f20235421ecce>
- Webinar: Strategic Planning Part One <https://vimeo.com/236954184> | Part Two  
<https://vimeo.com/236956936> (Helping All Trustees Succeed Mini-Webinar),
- Webinar: Sustainable Thinking for the Future of Libraries [New York State Library],  
<https://meetnydirect.webex.com/meetnydirect/lsr.php?RCID=2a91c82d3332287a224d7975b2b9b33a>

**Recording from Live Handbook Discussion:** Tuesday, May 3, 2022 – Planning and Evaluation  
<https://youtu.be/-NGnm8KzzEA>

**Post-Session Questions & Activities for the Boardroom**

*The questions and activities in this section are intended for trustees and their directors to discuss before or after a board meeting once they have read *Planning and Evaluation of the Handbook*, or watched the *Live Event Recording*.*

1. Planning is a great way of meeting the hopes and expectations of your community through the talents, resources and decision-making of your library staff, director and board. It is also a requirement of all New York State libraries as part of *Minimum Standards*, and one of nine *Trustee Responsibilities*.

As a board, take time to review and discuss the most recent version of your library's plan. Ask yourselves the following questions in partnership with your library director:

- a. When was it approved? Is it current within the last 3-5 years, or does it need updating?
- b. Does the plan incorporate a mission statement?
- c. Do the goals and objectives align with your mission statement and current library operations?
- d. Does the plan address your 9 Responsibilities as library trustees (See Page 16 of the Handbook)?
- e. Is your library director familiar with the plan, and working with other library stakeholders to carry out objectives?
- f. Does the library director, in partnership with the board, review and discuss plan accomplishments and impacts?
- g. How do plan successes get conveyed to the community to increase public awareness and celebrate community enrichment?

Answering these questions should give trustees and directors a good understanding of how important it is to have a current plan, and how reviewing the plan regularly can deliver community impacts. Your answers may also determine if it is time to listen to your community, and develop a new plan.

2. The Trustee Handbook mentions three types of plans, *Long-Range*, *Strategic* and *Operational*. Boards that recognize it is time to create a new plan, or plans, should identify which plan is most critical to moving the library forward in the near-term. In most cases, this is a *Strategic Plan*, which gets everyone focused on what needs to be done in the next 3-5 years.

Take a few minutes as individual trustees and director to review the questions provided on **Page 59 of the Trustee Handbook**, "*Creating a plan involves answering questions:*"

Following review, discuss as a group how you will develop your plan to answer these questions that form the framework of your *Strategic Plan*. Share your thoughts and ideas through the lens of a plan that covers 3-5 years.

3. What are the components of a strategic plan? Take a moment to study the five recommended components on **Page 60 of the Trustee Handbook**. These components can form the outline of your plan. While each library's plan is unique, these plan components enable the board and director to develop goals and objectives that are manageable and obtainable, while establishing the actions

needed, and the criteria to evaluate them. Knowing these components will help with the final activity of this toolkit, ***5-Step Planning Process***.

4. Refer to ***Page 112 of the Trustee Handbook***. Take time as individual trustees to review the ***5-Step Planning Process***. It should only take a few minutes.

Reconvene as a group following your review. Use this time to consider your current plan (Question #1), determine the type of plan you need (Question #2), and recall the components of a plan (Question #3). You should now be in a good place to embark on the ***5-Step Planning Process***.

The resources and methods you use to plan can vary. It is vital all trustees and their director review the different types of Resources (***Page 61 of the Trustee Handbook***) before identifying the right approach. What works for one library might be different for another library. The most important thing is that your library engages with your community, and creates a plan that is meaningful to most stakeholders through meaningful impacts.

Libraries should also contact their public library system for assistance. Public library systems are working with, and learning from many libraries all at the same time. Your system will have helpful insight, and experienced consultants who are eager to facilitate whatever process proves successful for your library.