Building Your Library Association

Slides: Topic 5: Planning for the Association

International Federation of
Library Associations and Institutions

Learning Objectives

- At the completion of this topic you should be able to:
  - Explain the difference between a library association's vision and its mission
  - Differentiate between a strategic and an operational plan and understand the purpose of each
  - Demonstrate an understanding of basic planning terminology and how to apply it
  - Describe the typical phases of planning
  - Explain the importance of stakeholder engagement or ownership of major plans
  - Identify key reasons why evaluation of plans is required
  - Explain the use of tools such as a SWOT analysis in strategic planning
  - Account for the importance of communicating plans to stakeholders and reporting on their outcomes

Vision statement

- A vision is a picture of the desired future. The vision for a library association will help frame its future development and the benefits it can bring not only to its members but also to the library and information profession and to the wider community
- A vision statement is used to communicate the end goal of an entity; it gives a concise impression of the desired future tense

Characteristics of a good vision statement

- Written in a future tense
- Can be easily understood by a wide variety of stakeholders and is easy to communicate
- Describes a compelling future state that engages the heart as well as the head
- Avoids target dates unless the vision is truly time-dependent
- Describes the future state in terms of the interests of key stakeholders Although aspirational, a good vision statement needs to be verifiable and authentic
- Is sufficiently flexible to remain relevant and viable over the life of the programme
- Is short and memorable

Mission statement

- It describes the purpose, path and sometimes the philosophy of an organisation
- It clarifies the role of the organisation, what it does and what it stands for and why it does these things
- It can identify what makes an organisation unique

Activity 6: Vision and mission statements

- Draft a vision and a mission statement for your own association. Groups are asked to identify the key stakeholders for their association
- Define stakeholders – not only members but all those who have a vested interest in your association

Strategic and operational plans

- Planning is setting the direction for something – some organisation or system - and then guiding it to follow the direction
- Plans include: strategic, operational, budgets, communication, advocacy, project

Planning terminology

- **Goals** are specific achievements for some overall result, for example, the mission of an organisation.
- **Objectives** are specific to achieve the goals in the plan. Objectives are usually "milestones" along the way.
- **Resources** include the people, materials, technologies, money, etc., required to implement the goals.

Phases in planning

- Begin with your vision and mission. These provide the over-arching framework for all your plans
- Take stock outside and inside the system

  Find out what others are doing:
  - Analyse the situation
  - Establish goals
  - Establish objectives and strategies to reach goals
  - Ensure that achievements against plan are reported to all stakeholders
  - Acknowledge completion and celebrate success

Planning Guidelines

- Get ownership – ensure input from divisions and groups as well as from the board
- Build in accountability (Regularly review who's doing what and by when)
- Note deviations from the plan and re-plan accordingly.
- Evaluate the planning process as well as the plan

Activity 7: SWOT analysis

- Work through one example of a strength, weakness, opportunity and threat (SWOT) for your own association (whole group)
- In smaller groups, conduct a very short SWOT analysis for your own association
- Use the template in the Annex to guide this process

Activity 8: Strategic planning

- Consider how the vision and mission for either your library association would translate into a strategic plan
- Use the template in the Annex to help you complete this

Activity 9: Operational plan

- Refer to the strategic plan you have completed
- Construct an operational plan for one year of your strategic plan
- Use the template in the Annex to guide you
- Complete as much of the Operational Plan Template in the Annex as time permits

Dissemination of the plan

- Report and disseminate to stakeholders using:
  - Newsletter
  - Website
  - Via the annual report – which reports on financial and strategic plan goals and achievements.
  - Listserv to members
  - Promote at association conference, AGM
  - Ask divisions to make this an agenda item and discuss.
  - Present to key stakeholders and discuss/provide briefings as appropriate