



CHARLTON PUBLIC LIBRARY

STRATEGIC PLANNING PROJECT FLOWCHART FOR 2023-24

STEP 1 - DEVELOP PROJECT PLAN

~October - November 2023~

PLANNING ACTIVITIES

1. Establish Project Goals
2. Create Timeline of Activities
3. Identify What We Want to Learn
4. Identify Key Stakeholders

STRATEGIC PLAN FOR FISCAL YEARS 2025-2029

Plan Term = 5 Years

PROJECT PLAN GOALS

Inclusivity
Objectivity
Transparency

STEP 2 - ASSESS CURRENT STATUS AND ID COMMUNITY NEEDS

~November 2023 - February 2024~

ENGAGEMENT & ASSESSMENT ACTIVITIES

1. **COMMUNITY VISIONING EXERCISE** (SPAC) (13)
2. **3 FOCUS GROUPS** (26)
 - o Focus Group #1 - Community Members (10)
 - o Focus Group #2 - Community Members (7)
 - o Focus Group #3 - Teens (9)
3. **2 SOAR EXERCISES** (21)
 - o Board of Trustees, Charitable Trust Board Members, and Friends of CPL (13)
 - o Staff (8)
4. **2 SURVEYS** (794)
 - o Community Survey (605)
 - o Teen Survey (189)

NOTE: The # of participants or respondents is in parentheses.

WHAT IS A SOAR EXERCISE?

A **SOAR** exercise is used to analyze current and future conditions that affect the Library and its ability to provide services it deems necessary. It identifies key Library **S**trengths, **O**pportunities, **A**spirations, and **R**esults (performance/progress metrics).

STEP 3 - SYNTHESIZE & SUMMARIZE ALL DATA

~March - June~

GENERATE REPORTS

1. Analyze Feedback Collected
2. Identify, Summarize, and Prioritize Key Themes, Ideas, Trends, and Open Issues/Questions
3. Draft **Community and Library Profiles**
(Presentation of hard data/statistics)

STRATEGIC PLAN COMPONENTS

1. Mission Statement
2. Vision Statement (optional)
3. Values Statements (optional)
4. Assessment of User Needs
5. Multi-Year Strategic Goals
6. Multi-Year Supporting Objectives (optional)
7. Planning Methodology Description
8. Governing Board Approval (Trustees)

PLUS Annual Action Plan/Tactics (due annually by 12/1 for the next fiscal year)

*** MBLC does not require the Optional components**

STEP 7 - SUBMIT STRATEGIC PLAN TO MBLC

~September~ (due to MBLC by 10/1)

STEP 6 - APPROVE STRATEGIC PLAN (INTERNAL)

~August~

Board of Trustees

STEP 5 - DRAFT STRATEGIC PLAN

~June - August~

STEP 4 - DEVELOP KEY PLAN COMPONENTS

~March - June~

1. Mission Statement
2. Vision Statement
3. Goals and Objectives