SARGENT MEMORIAL LIBRARY
STRATEGIC PLANNING PROJECT PROCESS FLOWCHART FOR 2021-22

STEP 1 - PLAN AND LAUNCH PROJECT
~December 2021~

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

STEP 2 - ASSESS CURRENT STATUS AND ID COMMUNITY NEEDS
~January - February 2022~

ASSESSMENT ACTIVITIES
1. COMMUNITY VISIONING EXERCISE (13)
2. 3 FOCUS GROUPS (18)
   - Focus Group #1 (5)
   - Focus Group #2 (6)
   - Focus Group #3 (7)
3. 2 SOAR EXERCISES (17)
   - Staff (7)
   - Trustees & Friends of the Library Boards (10)
4. COMMUNITY SURVEY (285)

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 Strengths, Opportunities, Aspirations, and Results.

STEP 3 - ANALYZE, SYNTHESIZE, AND SUMMARIZE DATA
~February - March~

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

STEP 4 - DRAFT KEY PLAN COMPONENTS
~February - March~

STRATEGIC PLAN COMPONENTS (MBLC Specifications)
1. Vision Statement *and/or*
2. Mission Statement
3. User Needs Assessment
4. Multi-Year Strategic Goals
5. Multi-Year Supporting Objectives (Optional)
6. Brief Description of Planning Methodology
7. Governing Board (Trustees) Approval
8. Tactics/Action Plan - Fiscal Year 1 (Optional)

STEP 5 - DRAFT IMPLEMENTATION PLAN (aka Annual Action Plan)
~April~

1. Tactics/Annual Action Plan
2. Performance Metrics

STEP 6 - DRAFT STRATEGIC PLAN DOCUMENT
~May~

STEP 7 - APPROVE STRATEGIC PLAN (INTERNAL)
~June~

Board of Trustees Review

STEP 8 - SUBMIT STRATEGIC PLAN TO MBLC
~July 1, 2022~