

Strategic Planning for SLA Chapters & Divisions

Building a 3 Year Plan

Agenda

- Current situation and session objectives
- Working session to share ideas about strategic goals and objectives
- Selective report backs
- Next steps

Current Situation

- Unit level planning is not consistent
 - Only 1/3 of units have a strategic plan
 - Many plans have not been updated in the last 4 years
- SLA has many association-level initiatives in progress
 - Examples: Centennial, Strategic Alignment, Information Ethics
 - Increased need for units to plan now for activities that will happen in 2009 and 2010.

Objectives for Today's Session

- Address key questions such as:
 - How much should unit level plans dovetail with the Association's initiatives?
 - How much of a unit level plan will be unique based on factors as mix of industry, concentration of members, geography etc?
- Review the planning process and resources
 - Define steps for establishing an ongoing strategic planning process at unit level
 - Provide resources and tools to aid in continuity as unit leaders change over time

Starting Point for Planning

- Situation assessment: where are we now?
- Desired direction: Where should we go?
- Strategic plan: How will we get there?
 - Start with a unit level mission statement
 - Assess impact of association level initiatives for unit
 - Set goals and objectives ranging over 1-3 year time frame

Mission Statement

- A mission statement should answer these questions:
 - What unique attributes make this unit special?
 - What are the opportunities or needs we exist to address?
 - What are we doing to address these needs?
 - What principles or beliefs exist to guide our work?

Sample Mission Statements

- The San Andreas Chapter, the *Technology Chapter* of the Special Libraries Association, proactively advances our profession such that we direct the evolution of our future roles.
- We foster knowledge management's critical role in the workplace by providing educational courses and establishing communities of practice to discuss knowledge management and its implications in an economy which values innovation, software, services and relationships.

Goals & Objectives

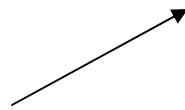
- Plan should outline 4-5 high level goals
- Each goal should have 2-3 specific, action oriented objectives
- Goals and objectives should address a three year time frame

Goals & Objectives - examples

Goals

Objectives

1. Build awareness of SLA and of unit



1. Develop PR plan for member achievements

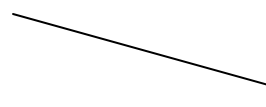


2. Identify and build ties to other regional associations

2. Leverage new technologies to enhance member services



1. Create a unit wiki to maintain archives



2. Offer a mix of live and virtual events

Example focus areas for goals

- Aligning with Association initiatives
- New membership outreach and development
- Fundraising and financial planning
- Expanding member services and communication
- Planning for milestone events

Break out groups

- Gather in tables by chapter or division
- Each person shares 1-2 key issues or desired goals for their unit (10 minutes)
- As a group, identify 4-5 goals to work on (5 minutes)
- Identify 3 objectives for each goal (15 minutes)

Goals and Objectives Worksheet

- Goal 1: Increase unit membership and member satisfaction
 - Establish plan for member needs survey
 - Ensure ongoing communications from leaders via discussion list
 - Define set of activities to welcome new members
- Goal 2:
 - Obj 1
 - Obj 2
 - Obj 3
- Goal 3:
 - Obj 1
 - Obj 2
 - Obj 3
- Goal 4
 - Obj 1
 - Obj 2
 - Obj 3

Next Steps

- Appoint a Strategic Planning Chair and Committee (if not already in place)
- Schedule a brainstorming session to review current situation and create or update goals
- Write 3 year plan or revise existing plan to address current goals
- Establish an ongoing process to incorporate member input and revise/update plan

SLA Resources

- SLA Info Portal Page on Library Strategic planning
 - Citations and links to articles
 - Samples of library strategic plans

<http://www.sla.org/content/resources/infoportals/libstrat.cfm>
- SLA Strategic Planning Handbook
 - Available at <http://www.sla.org/pdfs/sphand.pdf>
 - Includes citations for additional resources
 - Lays out a basic process for compiling a strategic plan

SLA Resources

- Many units post their strategic plan on their website
 - Washington, DC: <http://units.sla.org/chapter/cdc/>
 - San Andreas: <http://www.san-andreas-sla.org/archives/stratplan.html>
 - Food & Agriculture
<http://units.sla.org/division/dfan/2007stratplan.doc>
 - Knowledge Management
<http://wiki.sla.org/display/SLAKM/2007-2009+Strategic+Plan>

Sample Chapter Plan Outline

(For facilitators to use at tables)

- Mission Statement
- Goal: Increase chapter membership and member satisfaction
 - Establish plan for member needs survey
 - Ensure ongoing communications from leaders via discussion list
 - Define set of activities to welcome new members
- Goal: Develop awareness of SLA in community
 - Identify regional association partners
 - Strengthen library school outreach
 - Develop PR plan for member achievements
- Goal: Diversify programming mix
 - Encourage special interest groups and programs (eg solo, law)
- Goal: Ensure continuity of chapter leadership
 - Establish new leader mentoring program
- Goal: Engage unit in Association-level initiatives
 - Create local plan for SLA Centennial
 - Assess opportunities for promoting sustainability
 - Support ethics ambassador

Sample Division Plan Outline

(for facilitators to use at tables)

- Mission Statement
- Goal: Increase division membership and member satisfaction
 - Establish plan for member needs survey
 - Ensure ongoing communications from leaders via discussion list
 - Define set of activities to welcome new members
- Goal: Develop awareness of SLA in <division specific> community
 - Develop PR plan for member achievements
 - Establish plan for identifying and developing sponsors and industry partners
- Goal: Diversify programming mix
 - Develop plan for interactive program components
 - Assess potential for programming delivered outside of conference
- Goal: Ensure continuity of division leadership
 - Establish leader mentoring program
- Goal: Support Association-level initiatives
 - Create committee for SLA Centennial
 - Identify ethics ambassador
 - Assess opportunities for promoting sustainability