

# fact sheet #19

## for Friends and Foundations

### **A CHECKLIST FOR FRIENDS BOARD STRATEGIC PLANNING**

Strategic planning is a wonderful way to bring the leadership of your group together and design the future for your group. This is an excellent time to consider new goals and objectives and new ways of doing things. The planning process can be fun, and if you are creative and open minded, it can stimulate a stagnant group and provide a catalyst for new programs, ideas, and members.

1. Set up a special session of the Board for planning. Choose a comfortable place to meet and plan to spend at least a half a day working. Be sure to include a member of the library's administration (the director if possible).
2. Re-examine or develop your mission statement. As succinctly as possible state exactly what your group does and why. Be sure your goals are in sync with the library's direction and priorities.
3. Next discuss and list ideas on separate pages of a flip chart for strengths, weaknesses, opportunities, and threats (SWOT) of your group.
4. With the mission statement and SWOT information at hand, begin to make a list of goals for your group to accomplish this year and be specific. You can refer to what has been done in the past but this is a good time to consider new goals as well. Refer to past issues of United for Libraries' *The Voice* or review *Even More Great Ideas for Libraries and Friends* to stimulate your imagination about what is possible.
5. If you have a list of goals and want to prioritize them, have the board vote on them with a numerical ranking. This will help you identify priorities based on the entire group's input.
6. With the goals ranked in order, begin to set out objectives for each goal. Here is the time to discuss new ideas and ways of doing things. Each goal should be broken down into the discrete tasks needed to accomplish them. This will enable you to engage more people with small, defined assignments.
7. How will you implement these goals and objectives? Based on the resources of your group: people, funds, and time you can implement the goals. Set times and dates for accomplishment of them.

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8. Keep good records of your accomplishments. Include them in your newsletter. Refer to these records at the next planning session.
9. Set the next strategic planning session to review your mission statement and strengths, weaknesses, threats, and opportunities. Are your goals in alignment with the library's goals? Have you been successful in helping the library improve its services? You may want to change the way you do things or try new ideas in the next year.
10. This kind of formal planning process will keep your board involved throughout the year and it will lead to greater accomplishment for the Friends.
11. For more information on engaging volunteers, see the Toolkit "Tapping Into the Biggest and Most Active Group of Volunteers in Town: The Baby Boomers," or view the webcast series "Baby Boomer Volunteers for Libraries and Friends," both available from United for Libraries.

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**United for Libraries**

Sally Gardner Reed, Executive Director  
109 S. 13th St., Suite 117B  
Philadelphia, PA 19107

(800) 545-2433, ext. 2161  
fax (215) 545-3821  
[www.ala.org/united](http://www.ala.org/united)