**Developing a Strategic Plan for T Public Library**

**Part Two: Strategic Goals, Assessments, and Annotated Bibliography**

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Team 1: The quality and creativity of your research is of real value to the T Public Library particularly with your in-depth analysis of the SWOT analysis in both Part 1 and Part 2 of this strategic plan. As you well know, effective, meaningful and well-considered environmental scanning, as part of the larger context of strategic planning, helps guide institutional direction, inform critical decision-making, and focus staff and management attention on key strategies to optimize resources and services during good times, and bad. You provide a very nice description of goals and also suggest creative measures to help determine and deliver positive outcomes. Your bibliography includes very well written annotations and is a helpful resource for those wishing to pursue a deeper understanding of the SWOT analysis particularly in contemporary public library settings. The team's Powerpoint, albeit text-heavy, is of professional quality and provides an attractive and compelling vision for the future of the T Public Library. Your individual assessments highlight the attributes of a high-functioning team: carving out time from the beginning to assign roles, communicating effectively with appropriate technology (in a virtual environment) and on a regular basis, establishing and meeting deadlines, and counting on each other to make substantial contributions to a team project.

Overall, very good work!

Grade: 14.5/15

Abstract

This submission includes Part Two of a two-part review of the library strategic planning process focusing on the T Public Library located in T, California. Using the information gathered from Part One, it provides five goals to help support the library’s mission, vision and value statements. These goals address maintaining a well-trained staff, providing targeted services that connect the library to the community, having up-to-date technology, maintaining a high quality collection, and increasing public awareness of the library. Suggested objectives, action plans, and measurable assessments are provided with each goal. In addition, an annotated bibliography is included that details important academic research in the field of library strategic planning and the use of SWOT analysis.

*Keywords*: T Public Library; City of T; strategic plan; staff development; community outreach; technology; marketing; collection development

Professional title page and a helpful abstract with just the right amount of detail to help the reader understand the focus of the report which follows.

**Developing a Strategic Plan for T Public Library**

**Part Two: Strategic Goals, Assessments, and Annotated Bibliography**

The T Public Library is the sole library for the City of T and services a population of approximately 60,000. To achieve success, the library seeks to employ a highly trained staff, improve patron services, and increase awareness of the library’s role as a vital part of the community. In Part One of this student project, an environmental scan and SWOT analysis were conducted for the library. This enabled the creation of proposed organizational mission, vision, and value statements. Part Two involved analyzing the data collected and perspectives outlined and resulted in the development of five proposed goals to assist the library in meeting its immediate challenges. A series of suggested objectives designed to implement the five goals were outlined along with assessments to ensure that the outcomes are measurable.

In brief, the goals include maintaining a well-trained staff, providing services that connect the library to the community, having up-to-date technology, maintaining a high quality collection, and increasing public awareness of the library. A detailed description of these goals and the associated objectives follows. Additionally, an annotated bibliography is included that details important academic research in the arena of strategic planning in libraries as well as research that the student team utilized in optimizing our SWOT process. A well-written introduction with the necessary context and high-level description to provide the key elements and logical progression of your analysis.

**T Public Library**

**Proposed Strategic Planning Goals 2012-2014**

The student team proposed a future for the T Public Library in which the library “seeks to act as the heart of the T community by being a gathering place that provides information, literacy, and cultural resources in a comfortable, attractive and welcoming environment.” The library’s new facility and location go a long way towards accomplishing this vision in which the library is “a civic space, and a community gathering spot” for T’s growing and changing population. We further suggested that, “By being the gathering place for the diverse community of T, the library will be a place to find educational resources, fulfill intellectual development and growth, and foster community outreach and development.” Meeting the needs of a “diverse and growing population by providing a knowledgeable staff that aspires to provide the highest level of customer service” is also critical in our view. To this end, “the best staff, volunteers, collections, services, and programs for the people of the City of T” are an important aim. With this vision in mind, the student team worked collectively to establish five goals described below. These goals were intended to be achievable within two years and to be sensitive to the current budget environment.

***Goal 1: To cultivate a high-level of professional expertise in library services among employees in order to provide excellent customer service and to recruit and maintain a high-quality staff.***

**Objective 1.1:** *Provide a gold-standard level of professional customer service to T Public Library patrons.*

**Action Plan:** In January 2013, the T Public Library will create and conduct a patron survey on customer service. All library staff will read materials on the topic of public library customer service, with time set aside to discuss the content at each regular staff meeting in January. For the month of February, each staff member will spend two hours per week formally observing customer service interactions between patrons and other staff members. Analyses of the positives and negatives of customer service from both the customer service surveys and the staff/patron observations will be reviewed at regular staff meetings, with care being taken to make the feedback impartial and impersonal. From March to June, management employees will develop a written standard for excellence in customer service based on the surveys, reading and discussion done earlier, with the intention of putting new practices in place by the summer of 2013.

**Assessment:** Customer service standards will be reviewed and discussed during at least one regular staff meeting per month on a continuous basis, with trends noted and revisions to the written standards made as needed. A follow-up patron survey will be conducted in January 2014, and patron satisfaction levels will rise by 10% or more.

**Objective 1.2:** *Develop a “grow-your-own” pipeline for library assistants and librarians.*

**Action Plan:** Starting in the fall of 2013, library employees will contact local high schools and community colleges to participate in their career days and provide information for school career centers. Management staff will also establish internship and job shadow opportunities for local high school and college students. By spring of 2014, the library’s professional librarians will begin an ongoing mentorship program to develop the cataloging and collection management skills of select library assistants.

**Assessment:** Participation in career education opportunities for local students will continue annually, and by 2016, the recruitment pool for open positions will increase by 10%, with a measurable increase in qualified candidates.

**Objective 1.3:** *Create low-cost and no-cost professional development opportunities for professional and technical library staff.*

**Action Plan:** Starting in January 2013, management will establish a unified calendar of ALA and other professional library organizations’ free webinars and other online and/or regional professional development opportunities, with the expectation that all staff will participate in at least one relevant webinar or workshop per quarter. In the summer of 2013, library staff will begin creating employee training screencasts in which procedures and policies are presented, in order to cross-train existing employees and orient new employees--these will be hosted on a free online video service. The library will also offer employees incentives for advancing their education in library science: it will pay for library assistants to seek library tech certification through Cuesta College’s online program (this is very low-cost); it will offer release time for professional library staff seeking their master’s degrees in library science through an online program such as SJSU SLIS; and it will pay for books and materials for MLS graduate students if they agree to stay at the library for at least three years after completing their degree. Additionally, the library will ensure that there is positive salary schedule differentiation for employees with technical certification or completed graduate degrees.

**Assessment:** Participation in quarterly professional development will be recorded and addressed in yearly employee evaluations. The number of certificated library assistants will increase by one third over the next year, and all professional librarians will hold or be engaged in the pursuit of an MLIS degree or similar within that same time frame. The salary schedule will be reviewed annually by the library manager to ensure that employees with advanced degrees or certification are paid at a higher rate than those without degrees or certification.

***Goal 2: To develop and maintain a strong connection to the community.***

**Objective 2.1:** *Increase awareness of library services, materials, and facilities.*

**Action Plan:** The library will make a conscious effort to be a part of other community functions, including parades, community awareness events, and fundraising activities. The Adult Services Librarian along with the Youth Services Librarian will work together to highlight the programs and services the library offers to all patrons and other members of the community. The Adult Services Librarian will work with the Friends of the Library and City Council to help promote the importance of the library. The Youth Services Librarian will work closely with schools, preschool programs, youth organizations, and homeschooling networks to provide tours and promote other programs. The Adult Services Librarian through will promote the availability of public meeting rooms. Special community events for fundraising and awareness will be held twice a year to raise funds and increase awareness of the library. The Adult Services Librarian and Youth Services Librarian will reach out to the community to arrange for other programs and services to hold events at the library and to provide information to the library. Special classes on a variety of topics including weight loss, travel, gardening, and finance will be offered.

**Assessment:** Awareness of the library will be an ongoing objective and the assessment will be based on attendance at specific events and tracking patrons who enter the library. Patron surveys after events and classes will assist librarians in tailoring their services to meet the public’s needs. (Good ideas. As part of the user feedback, solicit ideas for future programming that continue to address the needs and desires of the community)

**Objective 2.2:** *Foster a lifelong love of reading and learning in the community.*

**Action Plan:** The library seeks to meet the educational, informational, and recreational needs of the community and to inspire patrons to make and maintain personal connections with library services. Adult Services and Youth Services will provide book clubs for all age levels and interests. The library will provide a fiction and non-fiction book club, men’s only book club, young adult book club, graphic novel book club, and youth book club. The Youth Services Department will offer school tours of the library, along with story and craft time. A summer reading program will be offered to encourage children to read and utilize the library when school is not in session. Book sales from withdrawn material and donations will be held to draw people into the library. The Friends of the Library organization will provide a voice for the public in the library.

**Assessment:**  The library will hand out service surveys twice a year asking the public what services, programs, and materials they have enjoyed from the library. Attendance and support from patrons will determine what to add and what to no longer offer, with decisions made by the adult and youth services librarians. (Agreed, but what are the indicators that the goal of lifelong reading habits and increased learning in the community thanks to the library efforts have, in fact, been met?)

**Objective 2.3:** *Provide services that will bring more teens into the library.*

**Action Plan:** Starting in January 2013, the Youth Services Librarian will create and distribute a questionnaire for teen patrons and local secondary schools asking what events, programs, and services teens would like to see in the library. One question on the survey will ask if the teens would like to serve on an advisory board for the library. A Teen Advisory Board will be created to become an ongoing and integral part of the youth services department. The board’s size and protocols will be determined in February 2013 by the Youth Services Librarian, and teens will be invited to apply to serve for a set term, with the first meeting to be held in April 2013. In the summer of 2013, the Youth Services Librarian will work with the library manager and the Teen Advisory Board to analyze questionnaires and discuss teen library programming. Based on feedback and research, the library will create programs and services that will enhance the young adult department and bring more teens into the library. The first programs will begin in the fall of 2013.

**Assessment:** The Teen Advisory Board will meet monthly under the guidance of the Youth Services Librarian. Teen programs and services will be monitored to determine which events are popular. Constant feedback will be used to address and change services and programs based on popularity.
***Goal 3: To advance and support technology services to meet the changing demands of the public.***

**Objective 3.1**: *Add quarterly classes with technology themes taught by a computer volunteer.*

**Action Plan**: In January 2013, the T Public Library will start offering five different computer classes for the community. The library staff, including computer volunteers, will begin bimonthly meetings to organize a class rotation schedule. During each quarter, classes will be offered in both English and Spanish to support the Spanish-speaking population. The classes will be focused on technology themes such as Microsoft Office, Internet and computer safety, typing, database research, social networking, basic Photoshop and Movie Maker. Due to budget constraints, the computer classes will be taught by volunteers but will be overseen by staff librarians. At the end of each class, participants will be asked to fill out a questionnaire that will include an instructor evaluation, the participant’s preferred language, whether they feel it would be useful to repeat the class, and feedback on how to improve instruction.

**Assessment:** At the end of each quarter, the library staff will meet to assess the positives and negatives of the classes. The success of the classes will be based on attendance, evaluations, and the advancement of the subject. The data that is recorded will be used at the staff and volunteer meeting to focus on key issues such as whether more Spanish-speaking classes should be offered, the level of attendance of each specific class, and how to improve a class. From this data, the staff and volunteers will select another five classes and create a schedule for the following quarter. (Good ideas. Why a computer volunteer as teacher rather than a library staff member?)

**Objective 3.2:** *Assign a committee to explore emerging technologies.*

**Action Plan**: During the upcoming year the library staff will assign a committee to explore the emerging technologies that are needed to make the T Public Library an all-purpose library for the community. The committee will start to meet at the beginning of the 2013 calendar year and will meet once a month. The committee will focus on emerging issues that supports the libraries academic and recreational community. It will focus on adding more databases to support the academic community and will also discuss technology topics such as Facebook, RSS feeds, and the level of need for E-readers to support the recreational community. The committee will seek donors and grant opportunities to bring in funding for database and e-readers.

**Assessment:** Once a month the committee will have a meeting with the library manager to discuss the financial standing of the library and address the issue of providing more technology with a current budget of $58,000 for technology. At the end of 2013, the committee will be responsible for providing a detailed report on their completion of their current goals and will set up future goals. The committee will locate additional funding for at least one- to two-subscription databases and three new e-readers.

**Objective 3.3**: *Provide guidance for patrons who perform online research using database subscription services.*

**Action plan**: To provide assistance for the growing number of patrons who need to do online research using database subscriptions services, the library will provide online database research guidance during selected opening hours. To limit the financial impact for online database research help, a staff member will be assigned to support online database research during peak hours of need, but for no more than fifteen hours a week. During non-peak hours, the online database help guide will be staffed by volunteers. The support group will monitor how many questions are asked per hour and whether the question pertained to database research or internet research.

**Assessment:** The online database research group will meet once a month to discuss and review the data that is collected from the online research help desk. With the support group monitoring how many and what type of questions are asked, it will allow for the support group to create more efficient operational hours to best support the community and create FAQ wayfinders concerning online databases and research.

***Goal 4: To develop an advocacy and marketing plan that encourages staff and the community to raise respect and recognition for the library.***

**Objective** *4.1 Increase staff and community awareness about issues surrounding the library.*

**Action Plan:** In 2013, newsletters will be sent out to the public and staff via email. Short staff e-newsletters will be produced by library management on a weekly basis starting in January. The e-newsletter will contain topics, news, issues and trends about the T Public Library along with notes about trends and topics within the library profession. The e-newsletters will also provide recognition of staff achievements as appropriate. In January of 2013, a small team will be created that includes volunteers whose mandate will be to develop monthly e-newsletters to the community. Starting in March 2013, e-newsletters will be sent out to cardholders or anyone who subscribes to the email list in person or through the library website. They will contain news about the library, address issues that affect the library, and provide a list of activities that the library is offering each month. The e-newsletters will help bring issues into the open and allow staff and the community to stay current with the library.

**Assessment:** After a six-month period of implementation, the e-newsletters will be evaluated for usefulness. Staff and volunteers will be emailed a small survey about its relevance and usefulness. The library webpage will include a link for patrons to subscribe to the newsletter and the number of people who opt to subscribe will be measured over time, with the aim to add an additional 50 people per month.

**Objective 4.2** *Encourage advocacy for the library by providing resources to the community and staff.*

**Action Plan:** Starting in January 2013, the T Public Library website will contain a section entitled “Advocacy” or “Advocate for Your Library!”, and it will contain the following links, with additional links added as they are discovered:

* http://www.ala.org/offices/ola/libraryadvocateshandbook
* http://www.districtdispatch.org/2011/08/10-quick-and-painless-steps-to-effective-advocacy-for-libraries-webinar-video
* <http://www.ala.org/offices/ola>; http://www.atyourlibrary.org
* http://www.ilovelibraries.org

The links will provide information to staff and the community on ways to advocate for the library.

To encourage advocacy, the library will also create a yearly staff retreat, open to the Friends of the Library and the public, with presentations, speakers and discussions about advocacy and library’s ongoing role in the community. A guest speaker in the form of an outside library professional or consultant will be invited but will attend via the web if needed to keep this cost to a minimum. After the two-hour event, feedback will be gathered in the form of a one-hour open discussion. The library will also continue to promote Friends of the Library membership by providing a space to allow members or former members to make presentations. The library will also encourage feedback from the community through emails, comment boxes and frequent use of surveys to raise issues that concern the general public.

**Assessment:** Every month, the suggestions boxes will be reviewed and time will be allocated at the staff meeting to address any concerns. Based on the solutions suggested in the meeting, the library manager will address the most common concerns in writing on the ‘Advocacy’ section of the website and encourage staff to advocate for the library according to the library’s public statements or to refer patrons to this discussion forum directly. The yearly advocacy meeting will be recorded and provided as a link on the website—feedback will be gathered by comments added to the forum and addressed individually by the library manager. (All good ideas. Is there any way to engage the city council in these library efforts to increase library visibility and the role the library serves in the community to help with advocacy efforts?)

**Objective 4.3** *Create a marketing team and plan.*

**Action Plan:** Starting in January 2013, a marketing team will be established that includes some staff and volunteers. The team will establish a library motto and create promotional activities. The first activity the team will undertake is the creation of a monthly raffle for new cardholders. The team is encouraged to seek outside assistance such as local radio and news sources for promotional activities. The team will also seek to increase social media activities by contributing to all social media web pages such as Facebook, Twitter, Wordpress, and Linkedin on a daily basis. The marketing team will meet on biweekly basis to discuss social media pages and promotional activities.

**Assessment:** At the end of the year, usage rates of the library will be evaluated to see if there is an increase in users and user activity in the library. The team will meet after the evaluation and perform a SWOT analysis of the current strengths, threats, weaknesses and opportunities. That will be compared to the previous year’s SWOT and areas of progress or lack of progress will be identified and addressed.

***Goal 5: To maintain a balanced and well organized collection of high quality materials that will meet the educational, informational and recreational needs of the public.***

**Objective 5.1:** *Develop a strategy for weeding the collection.*

**Action Plan:** Starting in January 2013, a committee will be established that will be in charge of weeding the collection of T Public Library. The Library Collection Committee will consist of two librarians and two library assistants. A policy, process and specific rules for weeding will adopted within the first month and thereafter will be kept on the website and at the reference desk for the staff and public to view. Materials will not be removed solely because they contain political, religious or moral views that may be controversial or due to language or depictions deemed offensive. Replacement of worn volumes will be dependent upon current demand, usefulness, more recent acquisitions, and availability of new editions and will be based on a librarian’s recommendation during the review process. Factors to be considered in eliminating material entirely will include lack of circulation within a stated period of time, exclusion of the material from the standard core collection publications, poor condition of the material and dated content within the material.

As a suggested process, the committee will divide the library collection into monthly weeding assignments such that the entire library will be reviewed annually. Each month, a list of items that have not circulated for a period of five years for a specific section will be generated, and the list will be organized by call number and/or shelf order. This list will undergo no fewer than three reviews – one by a librarian checking against the core collection and at the shelf for issues of condition; one by a librarian who will be assigned to the area by the committee based on special knowledge of the section and who will review for balance and currency within the collection; and, a final review by the library manager. At each review stage, items can be marked for retention and have the five-year clock reset. Library assistants will complete the cull based on the reviewed and approved list – and, thereafter, the list will be made accessible to staff and public and kept for no less than ten years.

**Assessment:** The aim will beto weed the entire collection annually using a documented and systematic approach that is made transparent to the staff and public. At year’s end, the Library Collection Committee will file an annual report outlining the number of books culled from the collection by category and will address any issues of concern or disagreement in terms of maintaining currency or balance within the collection. Additionally, patrons will be offered the opportunity to review the weeding lists and dispute any weeding choices by submitting a Reconsideration of Library Materials form to the Library Collection Committee. Any such submissions will be addressed in the annual report for the year in which the form is received. Also within the annual report, the committee’s recommendations will be included for any adjustments to the process as deemed necessary to improve efficiency and to further protect the unique character of the collection as well as ascertain that random or ideological culling does not occur. Furthermore, a year-end review will include an analysis of the number of items culled by area (fiction, nonfiction, reference, juvenile, etc.), and those figures will be compared to the previous year’s figures as well as to new acquisition numbers to assist in maintaining an overall ratios of items by area.

**Objective 5.2:** *Write a collection management policy.*

**Action Plan:** Starting in January 2013, the Library Collection Committee will also be responsible for creating a written Collection Maintenance Policy that will include the weeding policy set for in Objective 5.1 plus guidelines for collection development and maintenance, acceptance of gifts, and the budget for each category in the collection. The Collection Maintenance Policy for the T Public Library will be based on the principles found in the Library Bill of Rights. This policy enables the Library to provide access to a wide range of materials in a variety of formats. It is the responsibility of the individual patrons to determine which of these materials is most appropriate to their needs. Patrons will have access to a Reconsideration of Library Materials Form that will be kept at the Reference Desk along with other forms accessible to the public.

**Assessment:** The Library Collection Committee will meet quarterly to discuss any issues with collection development and weeding. One of the quarterly meetings will include issues or updates that need to be made to the Collection Maintenance Policy.

**Objective 5.3:** *Develop specific criteria for collection development.*

**Action Plan:** Collection development will be based on the T Public Library’s commitment to the people within its community. This will include every age, race, gender, education, background, personal philosophy, religious belief, occupation, economic status, and human condition. The collection will focus on meeting the recreational, educational, and information needs of the public. The focus of the collection will be acquiring new materials with some of the criteria being: public demand and interest, critical reviews, presentation, readability, reflection of all sides of issues, author’s popularity, availability of the material, local or national significance, cost and quality of the physical/digital format. The Library Collection Committee will also use the same criteria in building an e-book selection and a separate budget will be set aside for acquiring materials in this area. The focus of collection development will be on increasing the e-book and young adult sections, while maintenance will be the focus of the non-fiction, media, and foreign language sections. The focus for adult fiction and juvenile sections will include both the increase and maintenance of materials.

**Assessment:** A written policy will lay out criteria for collection development to be followed. Quarterly meetings will be conducted by the well trained Library Collection Committee where circulation reports on materials will be studied to determine the interest of the patrons and the direction of the collection.

Your objectives, action plans and assessments provide very practical yet creative ideas for the T Public Library. There is a nice blend of ambitious goal-setting balanced with real-life measures of success which allow just enough room to maneuver in case future corrections are needed and other avenues need to be explored. Good job!

**Conclusion**

Our student team foresees a bright future for the T Public Library. We advocate for the use of a strategic planning process that includes progressive tools such as group-based SWOT analyses and that focuses on implementation of objectives and assessment of the decision-making processes and action plans. We also feel that an active staff development process with leadership and team-based management opportunities for all will ensure better long-term success in achieving the library’s mission. Through the setting of written goals and objectives and a process of regular review and active use of a strategic planning methodology, the library will be well placed to provide the best possible patron services and establish an enhanced role in the larger T community in the years to come. A good concluding paragraph which nicely synthesizes earlier strands of your analysis. One technique often employed in academic writing is to suggest areas for future study in the conclusion and this may be applicable in a strategic plan too, to offer specific areas for further investigation and improvement.

**Annotated Bibliography**

Atkinson, J. (2003). Managing change and embedding innovation in academic libraries and

information services. *New Review of Academic Librarianship 9*(1), 25-41. doi: <http://dx.doi.org/10.1080/13614530410001692013>

Atkinson examines the management of change with an eye to dealing effectively with continuous change and barriers to change. He elaborates on the transition toward a more corporate approach during the 1990s as opposed to the faculty-based, local authority ethos from previous decades that lacked strong financial and strategic management systems. In the modern paradigm as exemplified at the author’s institution, the University of Glamorgan in the United Kingdom, a Strategic Forum is utilized and specifically involves non-senior staff with representation from all departments. The model closely adheres to the university’s vision, mission and strategic goals, a system that is enforced through funding allocations based on each department’s ability to contribute to the university’s stated strategic goals. Atkinson works in an academic library with responsibility for the strategic and operational leadership of learning and corporate support services. In addition to strategic planning, he is published in the area of collaboration and quality assurance.

Balamuralikrishna, R., & Dugger, J. (1995). SWOT analysis: A management tool for initiating new programs in vocational schools**.** *Journal of Vocational and Technical Education*, 12 (1), Retrieved fromhttp://scholar.lib.vt.edu/ejournals/JVTE/v12n1/Balamuralikrishna.html

This journal article evaluates the use and importance of the SWOT matrix in creating new programs in vocational schools. Balamuralikrishna and Dugger emphasize that it is important to be aware of external and internal factors when creating new opportunities for students. The surrounding world is constantly changing, and management needs to be prepared to reflect that within the organization. New technologies, population demographics, and economic situations have an impact on the environment in which educational institutions operate, and it is important to be aware of all those changes. They argue that when properly done an inquiry helps to plan for the development of new programs and eliminate those that are not relevant to the current curriculum. It is a short but useful article since both authors provide information on the strengths and limitations of the SWOT matrix and provide examples on how to perform and develop a suitable and successful strategy. Both authors were affiliated with the Iowa State University in Ames, Iowa.

Bowlby, R. (2011). Living the future: Organizational performance assessment. *Journal of Library Administration*, 51(7/8), 618–644. doi: [10.1080/01930826.2011.601267](http://dx.doi.org/10.1080/01930826.2011.601267)

Bowlby advocates for creating team-based, user-centered, flattened hierarchical structures within organizations. There is also a strong emphasis on decision making at all level being driven by strategic approaches relating to mission, vision and goals as well as to facts, research and analysis. Bowlby defines organizational performance assessment and this reflects the trend to alter the focus of planning from internal factors and outcomes to institutional outcomes as measured by impact of the services in the broader context and quality measures over quantity. Beyond aligning institutional outcomes, he promotes aiming for outcomes that serves accreditation, serve as a body of evidence to demonstrate impact and articulate how the impact is manifest. Furthermore, he elaborates on the Association of Research Libraries LibQUAL+ model, which calls for fostering excellence, service quality standards, user feedback, assessment vis-a-vis comparable institutions, best practices and analytical skills in utilizing data. Bowlby is an independent consultant specializing in planning, assessment, and organizational development, with educational credentials including an MLS from Simmons College and an MBA, with a specialization in General Management and Organizational Behavior, from the University of Rhode Island.

Cervone, H.F. (2009). Strategic analysis for digital library development. *OCLC Systems & Services, 25*(1), 16-19. doi: 10.1108/10650750910931887

Frank Cervone is the Vice Chancellor for Information Services and Chief Information Officer at Purdue University, Calumet. He previously worked at Chicago State University as the Director of Library, Information, and Media Studies. His article is intended to bring together the ideas behind the traditional business planning and development of the digital library. It is an important article since the author fills in existing research gaps in the field of librarianship and project management. He not only provides the reader with useful and clear information on the method of strategic planning but also on how to perform a successful SWOT analysis. The combination of librarianship and productive business procedures may bring very rewarding results, and bring some form of standardization that can be used by those who would like to create new programs in their libraries.

Cole, K., Graves, T., & Cipkowski, P. (2010). Marketing the library in a digital world. *The Serials Librarian, 58*(1/4), 182-187. doi:10.1080/03615261003625729

This journal article identifies the concept of marketing as a significant instrument to promote library services, print and electronic resources. The authors stress that it is very important to have a proper and well established marketing plan. A plan allows the library to maintain an effectual relationship with its users and potential donors. Cole, Gaves and Cipkowski discovered that in order to be successful in building the relationships with its patrons, a library needs to learn about its users and surrounding environment. They recommend using the SWOT analysis as a procedure that provides library management with ideas on how to improve existing services and procedures and helps to create an action plan for the future. Kerry Coles is the Head of Marketing and Sales at Portland Press. Tonia Graves and Pam Cipkowski are librarians in academic institutions. This article provides the reader with a perspective on marketing and its tools from two opposite spectrums: publisher and library.

Coman, A., & Ronen, B. (2009). Focused SWOT: diagnosing critical strengths and weaknesses. *International Journal of Production Research, 47*(20), 5677-5689. doi:10.1080/00207540802146130

This journal article focuses on the theory of the SWOT analysis. Both Coman and Ronen admit that this commonly used business matrix remains an important tool in setting up strategic goals for the institutions. However, they provide the reader with a compelling argument that the SWOT analysis has its imperfections. The authors discuss different case studies where SWOT analysis was used, and they discovered a lack of consistency in the ways the analysis was performed and later reviewed. They suggest how the process can be changed or improved depending on particular situations. They address three resolutions that could improve problems with the analysis; the creation of event factor-analysis, the creation of core competences, and the use of core competencies trees. Alex Coman and Boaz Ronen are professors in the Faculty of Management at the Tel Aviv University in Israel.

Duren, P. (2010). Public management means strategic management: How canlibrariesfulfil the requirements of the new public management? *Library Management, 31*(3), 162-168. doi:10.1108/01435121011027336

Petra Duren is a professor in the department of Management of Library and Information Services at the Hamburg University of Applied Sciences in Germany. Duren’s article describes the transformation of the German National Library of Science and Technology (TIB) from a public management style to a more strategic one. Duren discusses new ideas and challenges that libraries are facing. She cites economic conditions as the reasons for why library managements are being forced to revaluate services and resources that are provided to the public. According to Duren, the library needs to prove that it is able to support itself and that the budget is spent efficiently. In order to do that, the management team performed a SWOT analysis and was able to clearly determine parts of the strategic plan that needed to be improved.

Dyson, R. G. (2004). Strategic development and SWOT analysis at the University of Warwick. *European Journal of Operational Research, 152*(3), 631-640. doi:10.1016/S0377-2217(03)00062-6

This journal article focuses on the strategic plan and SWOT analysis that was performed at the University of Warwick in the United Kingdom. The author discusses the current situation at the university and the reasoning behind the decision to formulate a new corporate plan. In addition, Dyson provides the reader with general, but very valuable information about the principles and measures of the SWOT matrix. He provides the reader with a very detailed description of all the steps of the SWOT process that were taken by the University’s management team. The entire process turned out very successful new strategies that got adopted from the SWOT experiment. Dyson goes further in his evaluation of the process by conveying ideas to improve the process of strategic development on its own. The author is Professor Emeritus who has been associated with the Warwick School of Business since the 1970s.

Johnson, H. (1994). Strategic planning for modern libraries. *Library Management, 15*(1), 7-18. doi: 10.1108/01435129410049007

This journal article was authored by Heather Johnson who was a temporary Assistant Librarian at the University of Luton in the United Kingdom. She addresses a number of important issues related to the process of strategic planning for libraries, especially the academic libraries. The article provides the reader with an overview of key definitions and terms and a detailed description of the planning process itself. The author describes important issues such as; organizational mission, goals and objectives and elaborates on parts of the SWOT analysis. Johnson provides the reader with additional information as she looks into the future. The creation and introduction of the strategic plan is only half of the process, according to Ms. Johnson, there is a need to set up a mechanism that will allow library managers to review the process and permit them to implement changes accordingly. Despite the fact that the article was written back in 1994, issues such as budgetary constraints, development of modern technologies, well trained staff and constricted space in the library building still remain valid. This is a short but very informative article.

Germano, M.A., & Stretch-Stephenson, S. M. (2012). Strategic value planning for libraries. *Managing Library Finances*, 25(2), 71-88. doi:1108/08880451211256405

This paper aims to investigate the use of “customer value-driven strategic market planning” (p.73) in the context of a non-profit service organization libraries. The authors argue that dramatically rapid environmental changes facing modern libraries make models used by business entities applicable in that these are keyed into dealing with change and embracing marketing techniques to ensure success in meeting planning goals at the implementation stage. Since revenue in non-profit organizations is not a valid measure, a “value creation” (p. 71) focus is encouraged. They promote the use of marketing approaches that involve “environmental scans, customer value creation and promotion of unique benefits” (p. 71) to this end. These approaches reflect newer trends in business strategic planning that call for plans that seek to produce more value to the customer—in short, the goal is not just short-term increases in market share but also longer-term benefits such as customer loyalty. The customer focus implies the use of marketing tools to measure and respond to inputs from the users in a service-based model or library setting. The concept promoted by scholars in this area which contends that “non-profit, service organizational cultures tend to resist change” (p. 72) is considered in their discussion. They offer three areas in which goals can be measured: fundraising, succession planning and library usage. The authors state that they offer an extensive background in theoretical and practical applications of sales and marketing. The offer a viewpoint paper based on their experience in planning at California State University, Los Angeles. Germano is the university librarian at UCLA and Stretch-Stephenson works in the university’s marketing department.

Helms. M.M., & Nixon, J. (2010). Exploring SWOT analysis- where are we now? A review of academic research from the last decade. *Journal of Strategy and Management, 3*(3), 215-251. doi: 10.1108/175544251011064837

Helm and Nixon’s journal article provides the reader with an extensive and very detailed overview of a decade of peer –reviewed literature resources that cover the topic of SWOT analysis. The article provides the reader with information on the history and origin of the term SWOT and its usage in many other areas other than the typical business environment. Their research indicated that different industries and institutions such as; educational, health care, government and for-non-profit organizations are benefiting from the use of this matrix. In addition it was indicated that the SWOT procedure is used globally in different countries even if the industry does not have a presence on the U.S. markets. This article gathered different opinions and discussions on the SWOT analysis, and the direction for the future. The authors provide a detailed descriptions of not only strengths of the process, but also the weaknesses and shared opinions expressed by other scholars in the field. In addition, the article discusses areas for future research. The surrounding environment is constantly changing and this should be reflected in the SWOT analysis. Also, there is an indication that other research methods such as literature review, interviews and workshops should be included in order to expand SWOT’s potential. Marlin Helms is a Sesquicentennial Chair and Professor of Management at the School of Business at the Dalton State College in Dalton, Georgia. Judy Nixon worked at the Management Department at the University of Tennessee at Chattanooga, Tennessee.

Hill, T. & Westbrook, R. (1997). SWOT analysis: It's time for a product recall. *Long Range*

*Planning, 30*(1), 46-52. Retrieved from http://ac.els-cdn.com.proxy.library.carleton.ca/S0024630196000957/1-s2.0-S0024630196000957-main.pdf?\_tid=cf7bfdcc-282e-11e2-bfbf-00000aab0f01&acdnat=1352219408\_f889b57ae6aec5930aae9fa84df9ffc8

Hill and Westbrook are often referenced as critics of SWOT process. Their work focuses on the use of SWOT within strategic planning and analysis processes in private industry. The scheme their investigation focuses on involves some 20 United Kingdom-based manufacturing firms that engage the SWOT process as part of a state-sponsored initiative. Since there are few instances for scholars to study SWOT in this level of detail, their work is considered both unique and important in identifying the pitfalls of the process. The authors work from the premise that the aim of SWOT is to encourage the adoption of best practices toward the end of increasing competitive advantage. Through comparative analysis and structured interviews, the writers document the SWOT process and address issues of how the entities proceeded and what the outcomes tended to be relative to implementation. Potential simplifications and oversights involving verification, recognition and distinction of fact are listed as considerations about SWOT. In some instances, language and reasoning used during the SWOT tended to be vague or points assumed valid without further consideration. Hill and Westbrook conclude that the SWOT tool may be “ineffective as a means of analysis” (p.50) and that arguably that SWOT itself is not analytical nor are the results often used toward strategic ends. They recognize its popularity relates to the fact that “it is very straightforward and requires little preparation” (p. 51). However, the fundamental concerns they detail are worth noting: requirement to prioritize factors, use of ambiguous words, no resolution of conflict, verification is not required, single-level analysis employed and links to implementation are lacking. Hill is listed as a Professor at London Business School, and Westbrook’s credentials include his position as Associate Professor of Operations Management at London Business School.

Lockerby, R., & Stillwell, B. (2010). Retooling library services for online students in tough economic times. *Journal of Library Administration*, *50*(7/8), 779-788. doi:10.1080/01930826.2010.488694

Robin Lockerby and Barbara Stillwell are both associated with the National University Library in San Diego, California. Their article discusses the role of strategic planning and SWOT analysis in enhancing the profile of the library for the growing number of distance education students. Library management is aware of budgetary problems, but at the same time wants to make sure that the resources and services will be available to the online students. Lockerby and Stillwell describe the process of the SWOT analysis performed by various library departments. This exercise assisted the library management in realizing that the current situation was not as undesirable as it was initially believed and it helped to create solutions on how to promote the library efficiently. The authors not only define the current situation but also look into the future by setting up goals and ideas that may be used by other libraries which are struggling with new technologies and online environments. The article shows clearly how to incorporate results of the SWOT analysis into real world strategies and polices that can be implemented within the organization.

Nelson, S. & Public Library Association (2009). *Implementing for results: Your strategic plan in action.* Chicago, IL: American Library Association.

This book is a companion volume to the ALA’s related title *Strategic Planning for Results*, also authored by Nelson. The primary work is a mainstay of planning for public libraries. However, Nelson indicates that many strategic goals are not achieved due to lack of implementation. The text notes that while planning should take about 5% of an organization’s time with the rest spent on implementation, 95% of the literature on the strategic process focuses on the planning and not the implementing of plans. The article provides a series of work forms and examples to assist with the concrete decisions that take “dreams to reality.” The author points to the need for staff to identify the activities that support the priority service responses with an eye to what is essential and what may need to be introduce or eliminated. Senior management are typically involved in this secondary process of streamlining and elimination. This structured-decision making process is designed to garners staff support for change via involvement and to ascertain that decisions by upper management are not perceived or are not “arbitrary or overly subjective.” Nelson is a consultant specializing in public library management and planning.

Nelson, S. & Public Library Association (2008). *Strategic planning for results.* Chicago, IL: American Library Association.

This book is part of the Public Library Association (PLA) Results Series, an ongoing effort designed to assist libraries in planning for change. The PLA, a division of the American Library Association, aims to “enhance the development and effectiveness of public library staff and public library services” and offers this periodically updated book as one of the key tools toward this end. In conjunction with this process, annual ‘boot camps’ for library staff have been offered and led by Nelson, and staff who attend the 5-day intensive examine the entire strategic planning process as refined by Nelson and her associates. The process begins with planning for the planning, focuses heavily on identifying service priorities, details the process of setting a strategic plan in writing and, finally, addresses winning approval and support for the plan. Meant as a very practical model for public libraries, the book includes forms and detailed step-by-step explanations of key elements of strategic planning that might otherwise seem beyond the ability of library staff and boards to achieve without the help of costly outside consultants. Nelson is a consultant specializing in public library management and planning.

Pacios, A. (2004). Strategic plans and long-range plans: Is there a difference. *Library Management*,25 (6/7), 259-269. doi 10.1108/01435120410547913

Ana Pacios works at the Library Science and Documentation Department at Carols III University in Madrid, Spain. Her article explores strategic and long- range plans and tries to find any differences between the both. She examines 65 public and university libraries in order to determine if there is a difference between both types of plans or names of those plans can be used as synonyms. She is not interested in the planning process or the philosophy behind it but searches instead for content information. She provides a reader with a history, different models and aspects of the planning process going back to the 1950s. The author stress that the idea of strategic planning is not a new concept for the libraries but one that has been supported since the 1980s. She also mentions the SWOT analysis as an integral part of any planning process, regardless if we call it long – range or strategic. This matrix became very popular with libraries in order to help them to prepare for future challenges, related to external and internal environments. She determines that there is a difference in a use of “strategic” vocabulary between public and university libraries, but mainly it is based on the nature of the libraries and the clientele they assist not necessary on the nature of the planning process itself. Pacios concludes that the difference between the terms “long–range” and “strategic” planning is insignificant; they refer to the same procedure of setting up goals and planning for the future of the institution. In addition to strategic planning, she has also published in the field of information management and the evolution of libraries and universities in Spain.

Rooney-Browne, C., & McMenemy, D. (2010). Public libraries as impartial spaces in a consumer society: Possible, plausible, desirable? *New Library World, 111*(11/12), 455-467. doi:10.1108/03074801011094831

This journal article questions the role of public libraries as impartial spaces to provide access to information resources in an ever-changing commercial environment. The authors look at the history of libraries and at their evolution from book depositories to modern day information centers where patrons are able to collaborate, meet and use print and electronic resources. Physical space and the virtual world are coming together in order to meet the needs of users. Rooney-Browne and McMenemy raise an important point about the role of libraries in the new digitalized world where information is available at “every corner” and libraries are struggling with financial limitations in order to provide users with appropriate resources. Is it possible for libraries to remain unbiased and at the same time explore commercial ways of generating income? The authors use SWOT analysis in order to answer this very complex question. Determining a library’s current situation through internal strengths and weaknesses and external opportunities and threats allows researchers to gain better knowledge and understanding of what direction a library should take. The results reveal that certain ideas can be borrowed from the commercial world such as cost efficiency or successful marketing. On the other hand, they are asking important questions such as are the libraries ready to exchange impartiality and independence for cash. Both authors are associated with University of Strathclyde in the United Kingdom.

Very good annotated bibliography. Your extensive research has uncovered a number of important perspectives from experts known nationally and internationally in the field. And I also appreciate the annotations which help the reader understand why each resource is of value and provides a firm foundation for future scholars who want to learn more and perhaps build upon this research.