

## WORKSHEET 1

### Strategic Planning Self-Grade Card

Grade your performance using the grading scale A–F. If you have more than four Fs and two Ds, you are not ready to develop a marketing plan. Look at figure 1-1, the Fix-It Tool Kit, for quick fixes to your strategic plan.

Phase	Key Questions	Grade (A–F)
<i>Starting Up</i>	<ol style="list-style-type: none"> <li>1. How effective was our start-up process?               <ul style="list-style-type: none"> <li>Did we develop a realistic timetable?</li> <li>Did we set a realistic budget?</li> <li>Did we lay out good ground rules for decision making and handling other tough topics?</li> </ul> </li> <li>2. How effective was the facilitator or in-house staff?               <ul style="list-style-type: none"> <li>Did we handle tough topics well?</li> <li>Did we get the plan done on time?</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> </ol>
<i>Planning Process</i>	<ol style="list-style-type: none"> <li>1. How effective was our planning process?               <ul style="list-style-type: none"> <li>Did it help protect us or get us more resources?</li> </ul> </li> <li>2. How effective was the planning team?               <ul style="list-style-type: none"> <li>Did it include a good mix of stakeholders, staff, administrators, board/faculty, and others?</li> <li>Was the group representative of stakeholders such as businesses, youth, homeschool families, ethnic/racial groups, and community leaders/elected officials?</li> </ul> </li> <li>3. How supportive was our dean or director?               <ul style="list-style-type: none"> <li>Was he/she enthusiastic and willing to commit his/her own time?</li> <li>Did he/she state that criticism was welcome, that no topics were taboo?</li> </ul> </li> <li>4. How well did our planning model work?               <ul style="list-style-type: none"> <li>PLA's <i>New Planning for Results</i></li> <li>Facilitator's own model</li> <li>Our own model</li> </ul> </li> <li>5. How well did we assess community trends and needs?               <ul style="list-style-type: none"> <li>Obtained quantitative data</li> <li>Obtained qualitative data</li> <li>Got input from stakeholder groups, leaders</li> <li>Reviewed all data and ideas carefully</li> </ul> </li> <li>6. How effective were we in gathering different types of data?               <ul style="list-style-type: none"> <li>Demographic data</li> <li>Behavioral data (library usage data)</li> <li>Psychographic data</li> <li>Library resource data</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol>

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### Strategic Planning Self-Grade Card *(cont.)*

Phase	Key Questions	Grade (A-F)
<i>Plan's Contents</i>	<p>1. Does the plan contain all these elements?</p> <ul style="list-style-type: none"> <li>Vision statement</li> <li>Values</li> <li>Mission statement</li> <li>Goals and supporting objectives (also called outcomes and supporting strategies)</li> <li>List of planning team members, affiliations</li> <li>Description of methodology used</li> <li>If methodology included <i>New Planning for Results</i>, does it have service responses for several of the thirteen areas?</li> </ul> <p>2. Does the companion action plan (business plan or annual work plan)</p> <ul style="list-style-type: none"> <li>Link to specific goal/objectives?</li> <li>Show steps to be taken?</li> <li>List responsible persons?</li> <li>Show target start and finish dates?</li> </ul>	<p>1.</p> <p>2.</p>
<i>Status, Review, Update</i>	<p>1. How well have we planned steps to review and evaluate the plan and its implementation?</p> <ul style="list-style-type: none"> <li>Do we provide written status reports for each goal/objective to the board at least semiannually?</li> <li>Do administrators review the plan regularly?</li> <li>Does the performance review of managers evaluate how well they have implemented appropriate steps in the plan?</li> </ul> <p>2. How well have we institutionalized the planning cycle?</p> <ul style="list-style-type: none"> <li>Do administrators and managers gear up to update the plan every 3-5 years?</li> </ul>	<p>1.</p> <p>2.</p>
<i>Implementation</i>	<p>1. How well have we integrated the plan into the operational and capital budgets?</p> <ul style="list-style-type: none"> <li>Does every FY budget cite goals and objectives related to the plan?</li> <li>Do departmental and managerial goals cite or support the plan?</li> </ul> <p>2. How well have we used the planning process and the plan's implementation progress to achieve a higher visibility for the library?</p> <ul style="list-style-type: none"> <li>Have we received regular publicity on progress in achieving the plan?</li> </ul> <p>3. How well have we used the plan to help to</p> <ul style="list-style-type: none"> <li>Develop and update marketing plans?</li> <li>Create branding and positioning strategies?</li> <li>Fight against cuts in standards and budgets?</li> <li>Allocate resources such as staff, dollars, space?</li> <li>Advocate for more resources?</li> <li>Recruit staff and board members?</li> </ul>	<p>1.</p> <p>2.</p> <p>3.</p>

**TOTAL:** \_\_\_\_ **A** \_\_\_\_ **B** \_\_\_\_ **C** \_\_\_\_ **D** \_\_\_\_ **F**