



**Montana Library Association**

*Montana's Libraries from the Mountains to Plains*

*Great Falls, Montana*  
**Strategic Plan 2011-2014**

*Completed June 2011*

***Ascent Strategic Development***

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# Montana Library Association - Strategic Planning

## DESIGN CONFERENCE AND SWOT ANALYSIS

(Strengths/Weaknesses/Opportunities/Threats)

June 19-21, 2011 – Great Falls, Montana

*Facilitated by Ned Cooney, Ascent Strategic Development*

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### **Background:**

In June 2011, board members and management staff of Montana Library Association met in Great Falls, Montana to discuss a strategic plan for the organization. The purpose of this session was to discuss the overall planning process; detail the Strengths, Weaknesses, Opportunities and Threats facing the organization; to devise the Focus Question, which becomes the central organizing theme of the Strategic Planning process; and to determine questions to ask stakeholders in an interview process before the planning process begins.

## OVERVIEW OF PLANNING PROCESS

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### **June 19, 2011 – Pre-Session**

- Design Conference-Overview of Planning Process, Logistics
- SWOT Analysis
- Devise Focus Question

### **Strategic Planning - DAY 1: June 20, 2011**

- Practical Vision-looking ahead 5 years in the future, what are the elements of a successful organization
- Underlying Contradictions-the blocks or patterns that are holding the group back from the Vision
- Strategic Directions-the "thrusts" or "themes" to organize actions to move toward the Vision

### **Strategic Planning - DAY 2: June 21, 2011**

- Complete a 12-month Implementation Plan, and identify the Accomplishments to move toward the Vision

## IMPLEMENTATION PLANNING NOTES

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- Periodic Check-in is crucial. Ideally, there should be space on regular Board agendas to check in on the plan, at least briefly. At a minimum, the Implementation Plan should be updated every 90 days and the full Strategic Plan should be reviewed and revised annually.

- Plan Coordinators will need to be identified to keep an eye on the overall plan and coordinate tasks and accomplishments.

# Montana Library Association - Strategic Planning

## SWOT ANALYSIS

### **Strengths, Weaknesses, Opportunities and Threats**

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#### **Introduction:**

SWOT Analyses are used in a variety of planning processes as a "Reality Check" to reflect the current situation of the organization.

**Strengths and Weaknesses** are internal to the organization; they represent the positives and negatives of the organization's current operations.

- Strengths can be leveraged and built upon to achieve success.
- Weaknesses must be identified and overcome (or at least minimized).

**Opportunities and Threats** are external to the organization, representing trends or events in the environment in which the organization operates.

- Opportunities are positive events or trends that represent potential growth or other positive outcomes for the organization.
- Threats are events or trends that could have a negative impact on the organization, the clients it serves, or the community as a whole.

Often, a trend or event can represent both an opportunity and a threat for an organization. For example, rapid population growth can mean increasing opportunities to meet the mission, but can also be a threat because increased demand can strain organizational resources.

## STRENGTHS

- Volunteers
- Works well with State Library
- Diversity of interests and abilities
  - Different types - academic, public, schools, special*
- Talents of members - qualified professionals and knowledge
- Participation in regional and national associations
- "In black" in our budget
- Successful history - longevity
- Good conference with conference planners
- Do a lot with a little - creative with resources
- Good leaders
- 1/4 time staffing
- Smart - quick to see solutions
- Team spirit with common goal
- Training - for members unavailable elsewhere (reasonably)
- Good PR for libraries
- Technologically savvy
- Good at "people networking"
- Association active in advocating for profession and intellectual freedom
- Open-minded
- Willing to change

## WEAKNESSES

- Could use more people willing to be active - involvement

*In divisions*

*State level*

*Time constraints*

*Apathy - not joiners*

- Lots of retiring (or near) from profession - need new blood
- Budget - relatively small
- Website needs updating (in progress)
- Internal self-promotion to our own members
- Demographic representative - age, gender

*Representation of rural/small libraries in leadership*

*Smaller membership per category*

- Challenge of meeting diverse member needs
- Communication (lack of time) and transferring between old and new leaders
- Transition/turnover - things fall through the cracks (maintaining institutional knowledge)
- Day to day flow of communication
- Lack of continuity about "who does what?"

## OPPORTUNITIES

- Emerging technologies
- Influence in political arena
- Academic/public/school libraries - ability to support each other
- Retired librarians, trustees (current and former) as base of support
- Economic downturn - more people need us
- Social Media
- New information platforms
- Grow membership - friends, other partners, elected officials
- Local partnerships - museums, others
- Private funding (grants, household giving)
- Great stats from state libraries - could be put out for public support (use data, services)
- Graying/retiring - opportunity to bring in younger professionals
- We're relevant to everyone in some way

## THREATS

- Montana is a big state!
- Unstable political climate
- Apathy/more "non-joiners"
- Mass retirements
- Lack of \$ and time
- Economic picture
- Losing jobs/more on remaining staff's plates
- Funding cuts - state and local
- Perception we're not relevant
- Profession is not respected and valued
- Privatization of public libraries
- Technology
- Privacy issues
- Copyright issues
- Misunderstanding/lack of education about what's affecting our economic picture
- Association with Central Asia Institute

## FOCUS QUESTION

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*Based on the SWOT analysis, the group devised the following Focus Question as the starting point and organizing concept for the Strategic Plan.*

How can Montana Library Association position itself to advocate for the profession, so that libraries and librarians become indispensable in a challenging economic and political climate?



## HOPES for this planning session

- Help me understand the “Big Picture”
- Know each other - cohesive whole
- Concrete direction
- Teeth into ideas - goals
- Specific tasks
- Elected officials understand importance
- Keep open minds - accepting of change
- Be able to transition between leaders
- Why are we doing this?
- That this makes sense to people coming
- More continuity
- More focused
- Definite direction
- Not afraid to shift/change
- More communication

# Montana Library Association - Five Year Practical Vision

Workshop Question: What do we want to see in place in 5 years?

Vibrant, Growing Membership	Effective Legislative Voice	Fresh & Recognizable Public Image	Seamless & Efficient Transition	Dynamic & Vital Website	Stellar Leadership Development	Streamlined Administration	Invigorating & Hot Conference	Powerful & Active Partnerships	Thriving Mentoring Program	Sustainable Fiscal Growth
<i>critical</i>	<i>critical</i>	<i>critical</i>	<i>critical</i>					<i>stretch</i>	<i>stretch</i>	<i>stretch</i>
Increase Membership	More Members on Government Affairs Committee	Update MLA Brochure	Create Relevant Transition Material	Membership Only Portion of Website	MLA Workshop For Incoming Leaders	Mission, Goals, Vision Visited Each Meeting	Nationally Recognized Presenters at Conference	MLA is Hub of Collaboration Among Organizations	We have 25 MLA Members Mentoring Librarians	Increase Paid Staff (Time)
All Members Know Our Mission Statement	Legislative Action Reflects the Work of MLA	We Have a Slogan (Branding)	New & Continuing Officers Leave Retreat with Toolbox	Website More Dynamic with Forums, Pictures & Discussion	Have 3 New Board Members Who Have Never Served Before	Voting Electronically is Easy & Efficient	Young Turks at a Bar (Networking For Under 40)	Identify Potential Formalized Partnerships	Mentoring Program	Conference Budget Increased by 25%
Increase Membership Participation	Get Full Funding From Legislature for Something	Successful MLA Brand in Place, & Visible, Recognizable	Flow Chart of Who Does What	Add Bulletin Board to Website	Coincide Elections with Conference	Board Members Are Constantly Engaged in Discussion with Each Other		Pursue Corporate Alliances	Effective Mentoring Pervasive in MLA	
Challenge Membership to Advocate, Educate & Do Something	One MLA Member is a Legislator	Regular Use of Value Generator (ROI)	There is a Timeline For Every Board Position	News Link on Website				MLA Has One New Partnership		
Increase Membership 10% with New Members	Certification Standards Maintained (Schools)	PR Hints of the Month	Update Manuals Yearly (Set the Time)	Regular Education (Stories) on Leadership						
90% Membership Retention From Year to Year	Restored Funding to State Library (1 Position)	Proactive Media Campaign	April Meetings Include Passing Old -> New Info							
Increase Membership to 1000										

Note: the Board decided to designate some of the elements above of their Practical Vision as "critical" to MLA's success over the next three years—the "must do" list. Those designated as "stretch" elements are seen as good for the Association as resources allow, but with a recognition that resources and time are limited.

# Montana Library Association - Underlying Contradictions

Workshop Question: What is blocking us from moving toward our Vision?

<b>Unshared Stories &amp; Uncaptured Knowledge</b>	<b>No Plan - Strategic or Otherwise</b>	<b>Who's On First?</b>	<b>Who Are We?</b>	<b>Barriers to Engagement</b>	<b>"We've Always Done It This Way"</b>
Discontinuity Between Incoming and Outgoing Board	Disorganized Focus	Confusing Roles & Responsibilities	Identity Crisis	Discouragement & Reluctance to Engage	Pervasive Frugality Fiscally & in Ideas
Poor Records & Archiving	Ineffective Meetings (Not Outcome Oriented)	Unclear Organizational Structure	Undefined Identity	Little Buy In by Academic Libraries	Small Potential Membership (Limited Pool)
Inconsistent Transfer of Institutional Knowledge	Unclear Direction (No Map)	Fragmented Accountability	Disorganized Image, Audience	Introverted Personalities	Relying on Tradition (Thought & Process)
Ineffective Communication	Obsolete Strategic Plan	Conflicting Needs & Priorities	Unclear Info on Who We Are	False Perceptions About Barriers Between Types of Libraries	
	Messaging is Not Persuasive & Not Specific to All Types of Libraries			Fragmented Membership	
	Undefined Framework				

# Montana Library Association - Devising Strategic Directions

Workshop Question: What innovative, practical actions will deal with the Contradictions and move us toward our Vision?

Responsibilities & Accountability				Knowledge Transfer & Mentoring within Board			Strategic Plan & Implementation			Focus & Follow Through
Clear Position Responsibilities	Focus Articles for Each Goal	Develop an Organizational Chart	Written Assignments	Mentoring for 1 yr at conclusion of office yr.	Gavel Passing Meeting	Exit Interview	Check-in on Plan Each Meeting	Outcome-Oriented Meetings	Create Strategic Plan & Act on It	
Share Plan with Membership for Accountability	Org Chart, Flow Chart, Accountability Chart	Committee to Update our Mission, Vision, & Goals. Create Measurable Outcomes!		Informal Guide (Diary Log)	Create Wiki: Annual Reports, Informal Communication/ O.B.S.		Set in Place Strategic Plan	Celebrate Successes	2x/yr: What Have You Done Towards S.P.	
Manage Dynamic Handbook: Updated Timelines	Revisit & Revamp Job Descriptions & Update	Publicize Attainable Goals & Celebrate Their Attainment		Day 1 of Retreat: Share & Record Outgoing Stories	In Person Meeting Between Incoming and Outgoing Board Members (Before Retreat)		Creative Thinking Manifesto	Overhaul/ Examine S. Plan Each Yr. (Agenda Item)	Portion of Plan on Agenda at Each Meeting: Action Plan	

PR & Marketing					Create & Earn a Positive Identity
MLA Stories to YouTube Links to Website	Develop "Elevator" Mission Statement: Branding, Slogan		Hire PR Firm For Branding	Hire Someone to Help with Branding: "Your Vision, Our Mission!"	

Involving Membership		Unifying Membership				Engage, Involve & Unify Membership
Write a Letter to Govt Official Time/Table at Conference	Tweak a Bit of Conference Each Yr. to Keep it Fresh	Promote Intra-Library (Type) Visits & Sharing	Purposely Cross Pollinate	Personal Calls for Programs & Ideas	Personal Visits	
Add Discussion Board to Website or Link to Discussion Board	Utilize Diverse Talents: Roles for All Types; "Your Expertise Needed Here"	Board Members at Functions as Conversation Facilitators (At Conference & Other Places)	Don't Label Work-shops or Label More Creatively	Offer an MLA Board Member Presence at All MLA Sponsored Events		

# Montana Library Association - Devising Accomplishments

Group Brainstorm to develop each Strategic Direction and determine One Year Accomplishments

## Strategic Direction: Focus and Follow Through

<i>One Year Accomplishments</i>	<i>Success Indicators (over next three years)</i>
<p><b>Reports &amp; Minutes Up On Website</b></p> <p><b>Strategic Plan on Website</b></p> <p><b>Timeline to Update Handbook Developed</b></p> <p><b>Google Group for MLA Board Created</b></p> <p><b>Org. Chart with Length of Term, When Elected &amp; Links to Governance Page (in Handbook)</b></p> <p><b>Mission &amp; Goals Refreshed &amp; Revised</b></p> <p><b>Handbook Updated</b></p> <p><b>Committee Chairs &amp; Members Informed with Strategic Plan</b></p> <p><b>Annual Report Parameters Defined as 4th Qtr Report inc. Pass-off Between Chairs (in &amp; outgoing)</b></p> <p><b>Strategic Plan Update Included at Leadership Retreat &amp; Annual Membership Mtg</b></p> <p><b>Committee Chairs &amp; Members Aligned with the Strategic Plan</b></p> <p><b>Handbook Updated, Position Responsibilities Updated</b></p> <p><b>Annual Reports Posted to Website</b></p> <p><b>Strategic Plan Shared at Annual Membership Meeting</b></p> <p><b>Pass-off Mtg Between all Incoming &amp; Outgoing Officers/ Representatives (at Retreat)</b></p> <p><b>Reflective Conversation with Outgoing Members at Retreat</b></p>	<p>Strategic Plan That We are Following, Updating, Revisiting</p> <p>Policies And Procedures in Place and Utilized</p> <p>Smooth Transition - New Officers and Board are Clear on Responsibilities</p> <p>Complete Historical Archive Developed</p> <p>Committees Aligned with Strategic Plan</p> <p>Articles in Focus to Highlight Each "Core" Goal</p>

# Montana Library Association - Devising Accomplishments

Group Brainstorm to develop each Strategic Direction and determine One Year Accomplishments

## Strategic Direction: Create and Earn a Positive Identity

<i>One Year Accomplishments</i>	<i>Success Indicators (over next three years)</i>
<p><b>Ad Hoc Formed to Develop Tag Line/ Slogan/ Elevator Message Crafted</b></p> <p><b>Division Chairs Met with Leg. Comm. Chair</b></p> <p><b>Target Allied Prof Groups are Identified</b></p> <p><b>Analysis of Leg. Day Attendance &amp; Benefits Done by Leg. Comm.</b></p> <p><b>All State Commissioners are MLA Members</b></p> <p><b>Directory Alert Mechanism Created for all Board Members</b></p> <p><b>Current Brochures Updated - "We Are MLA" &amp; Recruitment Brochures</b></p> <p><b>Division Chairs with Input Recruit Leg Comm Members</b></p> <p><b>Tag Line/ Slogan/ Elevator Message Crafted</b></p> <p><b>"We Are MLA" Brochure Distributed</b></p> <p><b>Letter Writing Campaign at Annual Conference</b></p> <p><b>Recruiting Process &amp; Packet Developed &amp; Implemented</b></p> <p><b>New Tag Line/ Slogan/ Elevator Message Adopted by Board</b></p> <p><b>Financial Plan for PR/ Marketing Consultant</b></p>	<p>Legislative Day - "Welcome Librarians"</p> <p>Slogan/Mission Understood &amp; Articulated by Board &amp; Committee Members</p> <p>Membership From All "Large" Library Directors (Using State Guidelines)</p> <p>School Library Memberships Increased by 20%</p> <p>Membership From Trustees Increased by 20%</p>

# Montana Library Association - Devising Accomplishments

Group Brainstorm to develop each Strategic Direction and determine One Year Accomplishments

## Strategic Direction: Engage, Involve and Unify Membership

<i>One Year Accomplishments</i>	<i>Success Indicators (over next three years)</i>
<p><b>Calendar of Various Meetings Created for MLA Recruitment Message to be Delivered</b></p> <p><b>Message Written to be Delivered at Various Meetings for MLA Recruitment Message with Board Approval</b></p> <p><b>MLA Recruitment Message Delivered at Various Meetings (Federations, MT State Lib., Workshops, MSC, Retreats)</b></p> <p><b>Plan for Conference Session Specialized for School Members on Saturday</b></p> <p><b>Mike at MSL Contacted About Directory Alerts, Dawn (East) Contacted About Personal Contacts</b></p> <p><b>Personal Contact with New Arrivals Facilitated by Members at Large</b></p> <p><b>Conference Session Specialized for School Members on Saturday</b></p> <p><b>Board Members Self-Assigned to Facilitate at Conference, Other Functions</b></p> <p><b>Website Update Completed inc. Job Postings, Disc. Board, Handbook, etc.</b></p>	<p>Full Committees</p> <p>People are Eager to Run For Office</p> <p>New Young &amp; Old Faces at Conferences</p> <p>375 - 400 at Conference</p> <p>Discussion Board is Actively Used (Min. 5 Lively Topics at a Time)</p> <p>"Cross-Pollination" Evident in Meetings, Conferences, MLA Functions, etc.</p>

# Montana Library Association - One Year Accomplishments (page 1 of 2)

Workshop Question: What Accomplishments will we achieve in relation to the Strategic Directions over the next 12 months?

Overall Plan Coordinators: Kim & Sarah	Qtr. 1: July - Sept 2011		Qtr. 2: Oct - Dec 2011		Qtr 3: Jan - Mar 2012		Qtr 4: Apr - June 2012	
<b>Focus and Follow Through</b> [Kim, Sami, Sarah, Debbi, Anne]	Reports & Minutes Up On Website [Sarah]	Strategic Plan on Website [Kim, Stacy]	Mission & Goals Refreshed & Revised [Exec Comm]	Handbook Updated [Eva, Sami]	Strategic Plan Update Included at Leadership Retreat & Annual Membership Mtg (prep by Mar 1) [Kim]		Annual Reports Posted to Website [Sarah]	Strategic Plan Shared at Annual Membership Mtg [Kim]
	Timeline to Update Handbook Developed [Sami, Eva]	Google Group for MLA Board Created [Sarah]	Committee Chairs & Members Informed with Strategic Plan (portion in Oct) [Exec Comm]		Committee Chairs & Members Aligned with the Strategic Plan [Committee Chairs]		Pass-off Mtg Between all Incoming & Outgoing Officers/ Reps (at Retreat)	
	Org. Chart with Length of Term, When Elected & Links to Governance Page (in Handbook) [Sarah, Stacy]		Annual Report Parameters Defined as 4th Qtr Report inc. Pass-off Between Chairs (in & outgoing) [Kim & Sarah]		Handbook Updated, Position Responsibilities Updated [Eva, Sami]		Reflective Conversation with Outgoing Members at Retreat [All]	
<b>Create and Earn a Positive Identity</b> [Norma, Mary Lou, Suzanne, Mary Drew]	Ad Hoc Formed to Develop Tag Line/ Slogan/ Elevator Message Crafted (At least one person from PR/ membership committee)	Division Chairs Met with Leg. Comm. Chair [Kathy]	Current Brochures Updated - "We Are MLA" & Recruitment Brochures [Deb K & Committee Reps]		"We Are MLA" Brochure Distributed [Debbi & PR Comm]	Letter Writing Campaign at Annual Conference [Judy, Leg Comm]	Financial Plan for PR/ Marketing Consultant [PR Comm]	
	Target Allied Prof Groups are Identified [Kari]	Analysis of Leg. Day Attendance & Benefits Done by Leg. Comm.	Division Chairs with Input Recruit Leg Comm Members		Recruiting Process & Packet Developed & Implemented [PR]			
	All State Commissioners are MLA Members (Process initiated at Apr Board mtg) [Debbi, Anne]	Directory Alert Mechanism Created for all Board Members (Goes to At-Large Directors)	Tag Line/ Slogan/ Elevator Message Crafted [Ad Hoc]		New Tag Line/ Slogan/ Elevator Message Adopted by Board [Kim]			



# Montana Library Association - One Year Accomplishments (Page 2 of 2)

Workshop Question: What Accomplishments will we achieve in relation to the Strategic Directions over the next 12 months?

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<b>Engage, Involve and Unify Membership</b> [Marje, Carrie, Jim, Kathy]	Calendar of Various Meetings Created for MLA Recruitment Message to be Delivered [Sarah]	Message Written to be Delivered at Various Meetings for MLA Recruitment Message with Board Approval [Lisa, M.J.]		Personal Contact with New Arrivals Facilitated by Members at Large [Marje, Dawn]	Conference Session Specialized for School Members on Saturday [Conference Planning Comm]
	MLA Recruitment Message Delivered at Various Meetings (Federations, MT State Lib., Workshops, MSC, Retreats) [Board Members]	Plan for Conference Session Specialized for School Members on Saturday [Kim]		Board Members Self-Assigned to Facilitate at Conference, Other Functions [Board members]	
	Mike at MSL Contacted About Directory Alerts, Dawn (East) Contacted About Personal Contacts [Marje]	Website Update Completed inc. Job Postings, Disc. Board, Handbook, etc. [Jim]			