

Chapter 1

Setting the Stage

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Overview

This chapter deals with the context in which library planning takes place. It looks at who should be involved in the writing of a plan, who should do the writing, how the staff and other stakeholders should be involved, and other aspects of what is often called "planning to plan." "The Recipe for a Successful Planning Process" provides an overview of the chapters to come in this book. Note also that Chapter 10 provides two table summaries on the steps needed in a planning process and the ingredients for a written plan."

The chapter urges planners to:

- Remember that the reason for their planning may affect the outcome.
- Decide on who should be involved, the stakeholders, and how to get them involved.
- Assign a single editor or author for the actual writing of the plan.
- Establish a budget for the planning process.
- Use the provided checklist for activities at this stage of planning.
- Use the library planning self-assessment checklist to gauge what needs to be done.
- Assign activities using a planning matrix.
- Estimate the expected levels of participation at various stages of the planning process.

RECIPE FOR A SUCCESSFUL PLANNING PROCESS

1. *Set the stage.* This step requires the administration and board to assess the issues, set a budget, and get the critical pieces into place. Use the planning matrix and self assessment checklist to help assure that the process goes smoothly. Consensus-building is a continuous part of the

planning process, and stakeholders, staff, board, and governing officials all need to reach agreement on the elements of the library's plan. See Chapter 1 for assistance.

2. *Design an Effective Plan.* The structure of the printed plan is important to its success, but more important is establishing a process so the stakeholders can get the work done. Chapter 2 provides guidance on these structural and process matters. The chapter provides the outline of a recommended plan as well as hints on what needs to be done to bring each section of the plan to life.
3. *Build Consensus for the planning elements.* Producing a plan is no good unless it can and will be implemented. Library board approval is not enough; it takes city council funding support, staff agreement, public interest, and much more. Building consensus for the plan is an ongoing responsibility, as Chapter 3 makes clear. The public relations section of the bibliography will help on this topic as well.
4. *Use comparative data effectively.* Effective planners must approach the data-gathering and presentation step with great care. Demographic data, library statistics, and financial information are critical for good decision making; however, it is important to keep the data gathering targeted to what is needed and to present it effectively. The director or other lead person should become familiar with the data sources indicated in Chapter 4 and be ready to present the assembled data.
5. *Define standards and percentile comparisons.* Effective planning means looking closely at comparable libraries by examining the current measures on these factors of all libraries of a similar size in the country. Chapter 5 provides directions on how to do these comparisons. The appendix provides percentile comparisons on 39 measures for 10 population categories in the country. Many states have library standards but the standards vary in their degree of specificity. Every planning process should track the numerical and prescriptive standards for the library's

own state and Chapter 5 provides the tools to do so. It is also helpful to refer to standards in other states or to the percentile measures in Chapter 4. Library planners will find the Bibliography a valuable source of further references to standards and trustee manuals.

6. *Integrate financial and governance issues into the plan.* It is an often-quoted truism that the budget is the primary policy statement of any agency. In that case, effective planners cannot ignore critical budget and financial issues as they develop their plans. Chapter 6 provides strategic guidance on budget and financial issues. For further detail and advice, planners can look to the Budgeting and Financial as well as the Fund Raising sections of the bibliography. Library planners plan in a context of state laws that constrain their activities to a large degree. Chapter 6 provides a framework for asking relevant questions about library governance in each specific circumstance. The Governance and Administration section of the bibliography allows for further reading on the topic.
7. *Define major planning sections.* Chapter 7 provides specific recommendations for the development of goals, objectives, and tasks in six main areas: electronic services, collection development, technology, access and facilities, staffing and personnel issues, and other service issues. The recommendations in this book differ from the method used in the PLA Planning Process documents where the goals and objectives—rather than being listed by functional area—are listed under the various roles or service responses that the library has chosen. The two plans found in Appendix 4 and 5 each use one of the methods: St. Joseph organizes goals and objectives by service response, while Brookfield's plan uses the functional area approach. Consult the bibliography for further detail on each section.
8. *Plan for new organizational options.* The group should always ask whether the current type of organization is the most appropriate for this library and its current population. Changes are rare, of course, but the questions should

be asked in every planning cycle. It is possible that a new form of governance and taxation may be preferable, and strategic plans should consider these new forms. Chapter 8 provides food for thought on important issues relating to organizational structure, and asks effective library planners to consider multijurisdictional, joint library and library district structures.

9. *Use the planning checklist and revise policies.* Effective planners must assure that the library has all the current bases covered before embarking on new endeavors, and the extensive checklists provided in Chapter 9 provide powerful tools for doing so. Only a very few libraries will be able to check “yes” on each item in these checklists, but negative and partial answers will provide excellent starting points for the development of goals and objectives. A library's policy manual should reflect its mission and plan, so a plan revision requires a review of policies.

Among other things, Chapter 9 provides a comprehensive checklist of the types of policies a library should have. The chapter also provides information on key policy issues, such as internet access and privacy that all libraries need to consider.

10. *Write and implement the plan.* This chapter provides two key tables. The first is a summary of all the steps in the planning process with short tips on what planners should expect and references to appropriate chapters and tables or figures. The second is an outline of the plan suggested in Chapter 2 with commentary from the various chapters of the book and references to key tables and figures. Effective planning does not start when an authority calls for a plan, nor does it stop when the planning committee presents its report. This chapter considers some of the strategies and questions that can be used to assure that the plan is properly implemented.
11. *Assemble the tools: Bibliography and Appendix.* The director will often be the lead person in any library planning process. He or she should become familiar with the

language, techniques, and processes of library planning by consulting items in the bibliography, which is arranged by broad topic. The section on the ALA Planning Process documents will be especially helpful. Appendix 1 includes information on Hennen's American Public Library Ratings (HAPLR), and Appendix 2 contains Percentile tables for all 9,000 libraries in the country on 38 data elements for 10 population categories.

ASSESSING MOTIVATION FOR THE PLANNING PROCESS

At the beginning of any planning project, the planners should take time to discuss the motivation for making a plan. The reasons may vary widely by participant, of course, but the perceived need often affects the outcome. The level of effort and dedication will be far different if the planners are committed to meeting the demands of the future than if they are preparing a plan merely to meet the requirements of a state or regional library authority.

Because the list of possible motivations is seemingly endless, everyone involved should understand the background of the planning process. The library board, administration, staff and, especially, the planning committee, should all understand why the planning is taking place. Failure to do so invites frustration and failure.

Sometimes libraries undertake a major planning effort because of a recent scandal or a failed referendum; at other times it is because a city council member has questioned library activities. Counties and cities frequently demand long range plans from all departments and on a regular basis, and many libraries have found a three to five year planning cycle most useful.

Many public libraries are part of public library systems that are usually state funded but sometimes include membership dues or fees. State library agencies usually have long-range plans as well, and effective planners will want to place the library's activities and plans within the context of these wider plans. Often states or regional systems require that local libraries establish wider plans as a condition for grants.

USING A CONSULTANT

At the beginning of the process, the Library Board—typically in conjunction with the director—will need to decide whether to continue the process with existing staff or to engage a consultant or consultants to lead the project. The Director must decide whether or not existing staff resources can handle the additional burden of a planning project. If the library has not conducted a previous planning process, or if a previous process was found wanting, serious consideration should be given to hiring a consulting firm for the process. Funding is a key issue here as well.

Consider what type of consultant and consulting you need, and be careful what you ask for. For example, if the board really wants a new circulation system or a new building, but simply asks for a comprehensive long range plan, they will be disappointed if the consultant delivers that comprehensive plan but gives short shrift to the building plan.

Carefully consider the outcome expectations of the board, staff, and the governing authority. If the board wants Sunday hours that staff are resisting, the staff want a new building, and the governing body wants a reduced staffing complement, it may be tough to use existing staff for the project.

Experience and ability to communicate about library issues is important. There are many consulting firms that specialize in strategic planning but that have no specific library experience. The library board will need to weigh the issues carefully and decide if the consultant should be a librarian with planning skills or a more general strategic planner.

The Board and Administrator should determine whether the potential consultant has previous experience locally and nationally. Local experience can be both a plus and a minus; it can keep the consultant too focused on local ways of doing things and cause him or her to ignore the broader vision often needed for long range planning. But local experience can allow the consultant to devise strategies that work that a consultant from another area would have missed. If you are thinking of hiring a consultant from far away, you may want to find out if they are willing to work with a local consultants as a team. It is important to know

if the consultants being considered will train local staff on the skills and techniques used in the planning process.

Keep in mind that many libraries across the country, libraries of all size, do a superb job of long range planning without a consultant. This book should help make that process and outcome even easier. But if the Library Board decides to hire a consultant for the project, the table below indicates the types of items that should be included in the Request for Proposal.

DEFINING THE LEVEL OF EFFORT

All participants should agree on the level of planning effort involved. Staff resources can be rapidly eaten up with requests for additional information on specific issues—information that may not result in any useful elements for the final plan. Clarify, and clarify yet again, the level of effort expected. Clarify—and clarify yet again—*who* will do the heavy lifting when it comes to finding the data and doing the research requested. Clarify—and clarify yet again—the projected target dates for publication and approval of major elements of the plan.

The director and board determine the level of effort involved with the project: Intensive, moderate, or basic.

1. An *intensive* process

- involves a broad-based planning committee representing all stakeholders.
- can result in extensive data collection, surveying, and development of data for patron outcomes (with substantial funding and support of staff, clerical help, and consultants).
- is needed if the library has recently weathered a crisis, if the outcome of the previous plan was disappointing, or if there are substantial challenges in the community.

2. *A moderate process*

- involves far less collection of survey data and typically utilizes focus groups, demographic data, and library statistics.
- may restrict the planning committee to the board or the board with a few staff and community members.
- requires additional consulting or clerical help, especially if the inventories cited indicate substantial needs.
- is indicated when a library already has a good long range plan, but feels an internal or external pressure (budget cuts, community growth or decline, etc.) to change.

3. *A basic process*

- involves the planning of the board and the director with perhaps some assistance from staff
- relies primarily on existing demographic and library statistical data rather than added information from surveys, focus groups, or similar activities and is less likely to require consulting or clerical assistance (unless the director is inexperienced in planning or is too busy)
- may be sufficient if the library already has a satisfactory plan, has not experienced any major crises lately, and if the internal and external pressures on the library are relatively moderate

DEFINING THE STAKEHOLDERS

A library planning effort usually begins when a library board member or an administrator suggests it, because of a perceived need, or because the previous multiyear plan has run its course. All of the library's major stakeholders should be involved:

- the library board,
- administration,
- library staff,
- city council (or other governing board),
- the friends of the library group and library foundation,
- area businesses,
- civic and social groups, and
- the public at large.

The library director or a designated library representative should contact each of these groups to explain the need for the planning effort, expected outcomes, and how much of the participant's their time and effort will be required in the planning process.

All the stakeholders need to be substantially committed to any library plan. Without staff commitment, new objectives for service will not be carried out with vigor. Without city council support, the needed resources will not be there. Without the Friends, support for special programs may falter, and so on. The greater the support for the plan, the more likely it is to succeed.

Contact the local media. Explain what the planning process is about, and invite reporters to the meetings. Press releases will often work for newspaper and local TV and radio, but a followup phone call will have better results. Good coverage of the process and the final plan can be good publicity for the library.

ESTABLISHING THE PLANNING COMMITTEE

Often the library board will be the planning committee, but consider other options as well. A broader based committee, including representatives from the municipal governing board, the library staff, and the public at large is usually the most beneficial. A subcommittee of the board is also an option. Keep in mind that while a larger group will be harder to schedule and communicate with, the results will usually be worth the extra effort.

The composition of the committee will depend on local circumstances, but several things should be clear to all planning committee participants:

- the plan deadline,
- the authority possessed by the planning committee
- to whom the planning committee is reporting, and
- what level of effort and staff participation can be expected.

At times planning committees go off the deep end, developing grandiose plans with no chance of approval by the library board or governing council. If approved, such plans stand no chance of implementation because of staff or library user resistance, and committee members have wasted their time. The library will continue, rudderless and adrift.

A plan that stands no chance of approval or implementation is worse than no plan at all. A plan without vision or excitement may be nearly as bad, as it will neither inspire nor excite anyone enough to do anything very worthwhile.

Developing a plan is not just a matter of getting all the people on a planning committee to agree on things; there must also be political and economic reality checks built into the process. Nonetheless, those reality checks must not stand in the way of the dreamers and visionaries among the planners. Strive for a mix of participants on the planning committee, and remember, reaching agreement on exciting plans is an art, not a science.

CHOOSING THE PLAN WRITER

There are many signatures on the Declaration of Independence and all the signers had a hand in its development; but luckily for posterity, they left the final wording to Jefferson. Committees can develop ideas and plans, but a committee should not even try to put the final plan into words; that job should go to a single individual—either the project consultant or someone on the staff or board with good writing skills. Sections of the plan may be written by others, but final editorial control should rest with a prime author. The committee can review the draft for clarity and completeness after

it is drafted, but the person chairing the committee should make it clear that the committee is responsible for content, not form.

LEADING THE PROCESS

There are several choices for facilitating the plan, and each option has its pros and cons. The library director is very often the most logical leadership choice, but he or she may be too committed to the status quo to take a fresh look at the operation. Other groups choose a board member with expertise in planning, but he or she may be more used to private sector than public sector planning. In some circumstances, libraries call on state or regional consultants to assist in the planning process, or it may be necessary or preferable to hire an outside consultant, usually a firm with a proven record of accomplishment in library planning. While outside consultants may be more objective, they also may overlook the difficulties the planning committee may encounter in implementing the plan. Sometimes the city or county has a planning office that can assist in the process, but they may be more accustomed to land use planning than library issues.

ASSURING STAFF PARTICIPATION

Involving the entire staff in all stages of plan development is not usually possible, but try to keep the staff involved in the formulation process, since the implementation of any plan will depend on their willingness and ability to help it succeed. Willing volunteers will do a better job than draftees will. Libraries with unions will want to work out arrangements for selecting and compensating staff before the meetings begin.

LIBRARY PLANNING SELF ASSESSMENT

Figure 1–1 Library Planning Self-Assessment Checklist

Plan element	Response			Comments
	Y	N	Some	
Vision Statement				
The library has an exciting, compelling vision that looks to the future.				
It has been updated recently.				
The entire staff, governing body, the public, and all major stakeholders can tell you what it is.				
Mission Statement				
The library has a meaningful mission statement that reflects its fundamental purpose in a clear set of statements.				
It has been updated recently.				
The entire staff, governing body, the public, and all major stakeholders can tell you what it is.				
Role Statements				
The library has adopted one or more roles (or service definitions) that broadly indicate the type of library that users can expect.				
The entire staff, governing body, the public, and all major stakeholders can tell you what these roles are.				
Core Values				
The current library plan indicates the core values by which the library operates.				
The entire staff, governing body, the public, and all major stakeholders can tell you what it is.				
Goals and Objectives				
Goals and objectives are clear and support the vision and mission of the library.				
Progress towards goals and objectives is measurable and time specific.				
If conditions change, the plan allows for necessary				
Budget				
The budget allocation process supports the goals and objectives established.				
A consistent and continuous review process assures that resources are allocated to achieve the stated objectives.				
Major costs for plan implementation have been clearly identified and included in the plan.				

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Plan element	Response			Comments
	Y	N	Some	
Stakeholders				
The library has developed a complete list of stakeholders.				
The list of stakeholders includes a broad range of groups with divergent opinions.				
The plan was developed with stakeholder input.				
Consistency of Plan and Actual Activities				
All current programs and activities of the library support the vision, mission, core values, and strategic goals laid out in the plan.				
Accountability				
Those responsible for carrying out the objectives of the library have the motivation, the capability, and the means to do so.				

PRELIMINARY TASKS

Figure 1–2 Preliminary Tasks for Planning Committee

Task	Comments	Assigned to:
Get board approval, endorsement by city council (or governing body), agreement by staff association.	This should be the first step in the process.	
Establish timeline	Depending on circumstances and resources, usually three months to a year.	
Budget for the funding and staff resources needed.	Even with a consultant, there will be additional planning costs for meetings, staff release time, printing, staff research, and related activities.	
Select Facilitator(s)	Library Director, Staff Member, Library Board Member, Municipal Planner, Consultant, Volunteer from Community.	
Determine authority of committee and method of gaining adoption of plan.	Put the charge to the committee, timeline, and proper reporting process into written form.	
Determine participants. Assign library representative to make appropriate contacts.	<ul style="list-style-type: none"> • library board • administration • library staff • city council (or other governing board) 	

Task	Comments	Assigned to:
	<ul style="list-style-type: none"> • friends of the library group and library foundation • area businesses • civic and social groups • public at large 	
Choose lead writer for the plan and any additional authors for sections of the planning reports.	The lead author must be thoroughly familiar with the library, relevant state laws, and the local community and should have both writing and speaking skills. Additional authors can be enlisted for specific sections of the report.	
Set up publicity and public relations activities schedule.	Depending on local media outlets, contact newspapers, radio, TV, etc. with press releases and media kits on planning efforts.	
<i>Other appropriate preparations.</i>		

ESTABLISHING A BUDGET

Make sure the library board knows up front that it can take substantial resources to plan well. The budget below lists in-kind as well as direct costs for the library. In-kind costs include items that are already a part of the ongoing library budget, such as salaries and office materials. Direct costs include things like contracts for consultants, postage, printing and meeting refreshments.

The sample budget in Figure 1–3 will help planners to draw up a budget for a planning process. The items listed will not apply to every planning process, so be sure to tailor it to your own circumstances. Depending on the size of the project, you may want to include additional subbudgets for some of the listed categories to better illustrate the components going into the salary costs or the mailing costs, for instance.

Figure 1–3 Sample Budget for a Planning Process

Item	Description of activity	In-kind	Direct
1. Personnel	___ hours of Director's time ___ hours for various other staff	\$___ \$___	
2. Personnel	___ Temporary clerical		\$___
3. Contract services	Consultant for project based on bid		\$___
4. Contract services	Staff assistance from		
5. Contract services	Survey design and printing	\$___	
6. Contract services	Survey execution - telephone, mail, other @ \$___ per respondent		\$___
7. Postage	For ___ separate mail-		
8. Paper and envelopes	For ___ separate mailings @ \$.___ each.	\$___	
9. Mailing labels	Purchased from municipality voting records or private vendor @ \$___ each		
10. Mailing labels	Developed in-house with existing staff @ \$___ each	\$___	
11. Mail distribution			\$___
12. Travel	By staff and board to ___ meetings @ \$___ per mile	\$___	
13. Printing	In house printing of ___ separate reports of ___ pages each @ \$___ per page.	\$___	
14. Outside printing	Contract printing of interim and final reports and plans @ \$___ per page for ___ copies of reports		\$___
15. Advertising	Paid notices for meetings and		\$___
16. Refreshments	___ meetings with an average of ___ participants @ \$___ per participant.		\$___
17. Other			\$___
18. Totals		\$___	\$___

LIBRARY PLANNING MATRIX

Consider the following matrix. The stakeholders in any public library will have various levels of response to library planning. The levels of activity indicated below are typical in this author's judgment. Consider your own circumstances and plan accordingly.

Figure 1–4 Library Planning Matrix Worksheet

Activity	Director	Outside consultant (if any)	Board	Planning committee	Staff	Other stakeholders
Planning to plan	H	H	M	L	L	L
Research and measures	L	H	L	M	L	L
Environmental assessment	H	H	L	M	M	L
Develop mission	H	H	H	H	M	L
Develop vision	H	H	H	H	M	M
Develop core values	H	H	M	M	M	M
Develop Goals	H	M	M	M	H	L
Assess current program	M	M	M	M	H	L
Approving planning elements	M	N	H	N	N	N
Approving new goals and objectives	M	N	H	N	N	N
Developing plan budget	M	M	M	M	L	N
Communication of plan	M	N	M	H	M	L
Implementation of plan	H	N	M	M	H	N

Key: H = High. M = Medium. L = Low. None = None.

**Figure 1–5 Typical Request for Proposal for Library Consultant
Library Background**

Include short history and current circumstances of the library with circulation and use data.

Financial Circumstances

Indicate budget circumstances for the past several years and anticipated future prospects. If there are major problems or opportunities, highlight them here.

Current Planning Issues

Indicate the library's current planning status. If there is an existing plan, indicate when it was developed, by whom, and its current status.

Need for the Project

The board and administration should have developed a list of reasons for requiring the assistance of a consulting firm. Those reasons should be spelled out here.

Budget

A preliminary budget for this project has been approved and vendor bids may not exceed \$_____. (Optional)

Project Description

As succinctly as possible, provide a description of the project and the outcome that the library is expecting. This will be expanded upon in later paragraphs under "Scope of the Work."

Scope of the work

1. **Tasks**—lay out the specific tasks envisioned for the consultant, including the type of meetings, surveys, and other activities expected. If there are special requirements, such as a budget review or building assessment, these should be noted.
2. **Reports**—specify the types of reports needed; for example, if a building assessment is required in addition to a long range plan, that fact should be specified. If a number of drafts are being required for review by the planning committee and/or board, that should be noted as well.
3. **Meetings**—inform consultants regarding the number and location of meetings they are expected to attend, especially if they are coming from out of town.
4. **Presentations**—note if interim or final reports will need to be made to the Library Board and/or other agencies, and indicate the time frame and type of presentation required.

5. Work not required—list specific things that are not expected of the consultant, such as local research on demographics or the conducting of surveys.
6. Stakeholders—indicate the key groups and individuals that have a major stake in the success of the operation (this group may expand during the project).
7. Timeline—determine the length of time allotted for the project and any significant interim steps or milestones.
8. Costs—require the consultant to indicate travel, communication and other costs as part of the entire bid. The bid should indicate the hourly (or daily) consultant costs for visits as well as for background work.

Required Proposal Format

1. Overview of the Project—consultants provide their understanding of the project, its purposes, and expected outcomes.
2. Statement of Work—consultants provide the specific details of the project and how it will be carried out for this library. Tasks should be listed with details on deadlines and benchmarks along the way. There should be a summary of the timeline for the entire project with additional schedules and timelines for more extensive projects.
3. Experience, Credentials and Qualifications—consultants provide their professional background information. If the library has specific requirements, such as having at least one person in the consulting firm with a Masters Degree in Library Science and library administrative experience, this is the place to indicate it. Consultants should be asked to provide information on all individuals who will be working on the project, not just the main members of the firm.
4. References—consultants provide the names of other libraries for whom they have done work, along with contact persons at these organizations.

5. Exclusions or Exceptions—consultants indicate any parts of the proposal that they feel are beyond the scope of the project, beyond their expertise, or better handled by local library staff.
6. Additional Documentation (optional)—consultants present additional documentation to help the library in its decision.

Assumptions and Agreements

The contract between the library and the consultant is expected to include the following items:

1. The project must be completed by _____. [Indicate penalty for noncompletion.]
2. The library will appoint one person with decision making authority to serve as a project coordinator/manager.
3. The library will provide appropriate support documentation for the successful completion of the project.
4. There will be no significant changes to the project during the project, unless they are mutually agreeable to the library and vendor.
5. At the conclusion of the project, all materials developed will become the exclusive property of the library. In addition, any and all work sheets and other working documentation will also become the property of library.
6. When applicable, travel and lodging will be billed at cost. Ground travel will be billed at the standard rate used by the library. Air travel will be by coach with a major U.S. airline. Lodging and meals will not exceed \$____ per day. All postage, UPS ground, overnight delivery, and shipping charges will be billed at cost. All telephone and data transmission charges will be billed at cost.
7. The basis for billing for services and products completed will be submitted at the end of each month (or at the end of the project)

8. Billing for travel, lodging, meals, postage, shipping, etc. will be invoiced separately at the end of each month (or at the end of the project).

Contact for Questions

1. Contact person—indicate name and preferred contact method (e-mail, fax, phone, mail, etc.) for all consultant questions.
2. Questions—indicate deadline date for all questions. (Relevant questions and answers will be distributed to all who have confirmed their intentions to submit a proposal.)
3. Available library documents—indicate which current library documents are available for distribution to bidders. Examples are: previous long range plans, annual reports, etc.

Contract Award

1. Basis for award of contract—indicate the method of bid award. Use current board or municipal guidelines. The basis could be the lowest bid or the most appropriate bid for the project. The library should probably reserve the right to reject any and all bids.
2. Interview dates (if any)—indicate when the board will be interviewing selected candidates.
3. Award date—indicate when the contract will be awarded.

Conclusion

This chapter provided:

- the context in which library planning takes place.
- ideas for involving the staff and other stakeholders.

- advice about the effect intentions have on plan outcomes. Readers are urged to carefully consider the reasons for their planning efforts and to assign a single editor or author for the actual writing of the plan.
- a preplanning checklist, a library planning self-assessment checklist, and a table indicating expected levels of participation at various stages of the planning process. The Request for Proposal form is available on the CD.