

Data-Driven Strategic Planning

A Practical Guide for Public Libraries



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Why Data-Driven Planning Matters

Every library strives to improve lives in its community. But how do you know if your efforts are having the intended impact? Traditional strategic plans often include broad goals, such as “increase literacy” or “strengthen community connections,” but stop short of clarifying what success looks like in measurable terms.

That is where data-driven strategic plans (DDSPs) come in. DDSPs go beyond aspirations by grounding strategy in clear,

quantifiable outcomes. They use metrics, often referred to as key performance indicators (KPIs), to define what success means and to measure progress over time.

At Bâton Global, we have helped public libraries across the country—such as Hayward Public Library (California), Live Oaks Public Libraries (Georgia), and West Des Moines Public Library (Iowa)—transform their strategies through this approach. The result? Plans that are clear, flexible, and actionable.

For a broader perspective on building effective strategic plans, see our article “How to Write a Winning Strategy: Best Practices from 100 Real-World Examples” (<https://www.batonglobal.com/post/how-to-write-a-winning-strategy-best-practices-from-100-real-world-examples>), which distills key lessons from across industries.

From Aspirations to Action

A good DDSP starts by connecting the library’s mission and vision

with measurable outcomes. For example, rather than stating, “Our goal is to support literacy,” a data-driven plan would say:

- Goal: improve literacy in the community
- KPI: circulation per capita and program attendance per capita
- Champion: a designated staff member responsible for leading the effort
- Target: increase circulation per capita by 5% in the next year
- Projects: initiatives such as expanding bilingual collections or adding literacy-focused programming

This framework makes success specific, measurable, attainable, relevant, and time-bound (SMART). It also builds accountability by assigning champions and tracking progress.

Why Flexibility Is Key

Unlike traditional plans that can become static documents, DDSPs are living frameworks. They recognize that not every initiative will work as intended.

If outcomes are on track, libraries can stay the course. If results fall short, the data help answer: What do we need to do differently? This flexibility allows libraries to respond to new opportunities and challenges—whether a shift in community demographics, emerging technologies, or unforeseen disruptions.

In other words, the plan doesn’t dictate every activity. Instead, it sets the destination, and staff retain the freedom to experiment with different ways to get there.

The Power of Measurement

Public libraries that embrace DDSPs benefit in several ways:

- Clarity: Everyone knows what the goals are and how they will be measured.
- Focus: Staff avoid being spread too thin across too many initiatives.
- Accountability: Champions are responsible for outcomes, not just activities.
- Transparency: DDSPs clearly communicate the why behind each goal, KPI, and initiative. When staff and stakeholders understand the reasoning, it builds trust and creates alignment. This strengthens the library culture.
- Advocacy: Data strengthen funding requests and demonstrate value to stakeholders.
- Adaptability: Results drive decisions, ensuring the library evolves with community needs.

Practical Tips for Libraries

1. Start with Existing Measures
Whenever possible, rely on KPIs your team already tracks, such as circulation, program attendance, visits, and active cardholders.

2. Keep It Simple

Aim for twenty to thirty-five KPIs at most. Too many measures can overwhelm staff and dilute focus. Start simple, and allow the plan to grow in complexity as the team becomes comfortable with the framework.

3. Assign Champions

Every KPI should have a champion—a staff member responsible for leading the effort and advocating for progress. Champions provide ownership and accountability, ensuring the plan doesn’t sit on a shelf.

4. Review Regularly

Schedule quarterly reviews to track results, celebrate wins, and adjust tactics as needed. Annual reviews can reset targets. These cycles keep the plan alive and responsive.

Lessons from the Field

Hayward Public Library (CA) used their DDSP to help gain support for both a refurbished branch and the development of a new community hub offering education, health, employment, and family services. Since these initiatives launched in early summer, the library has already seen increases in visits and program attendance!

The West Des Moines Public Library (IA) used its DDSP to align its mission—“to enrich lives by igniting curiosity, engaging community, and expanding perspectives”—with measurable outcomes. Their DDSP helped

garner support from their Friends Foundation for a new bookmobile, which has helped increase the number of people engaged at the event.

Common Pitfalls to Avoid

Although DDSPs offer clear advantages, libraries should watch out for these traps:

- Over-measuring: Tracking too many KPIs creates “data clutter.” Focus on the most important ones first.
- Perfect alignment obsession: Measures don’t have to map perfectly to every goal. Let existing KPIs serve as proxies when appropriate.

- One-and-done planning: A plan that isn’t regularly reviewed becomes outdated. Embed ongoing check-ins into your culture.
- Ignoring the human element: Numbers matter, but so does storytelling. Pair data with community stories to illustrate impact.

Bringing It All Together

Data-driven strategic planning isn’t about replacing the human touch with numbers—it’s about clarifying success, empowering staff, providing transparency, and building accountability. When done well, DDSPs help libraries stay focused on outcomes that

matter most, while remaining flexible in how they achieve them.

The most powerful plans combine three elements:

1. Clear goals defined in measurable terms
2. Practical KPIs that guide progress
3. Regular reviews that keep the plan alive

With these in place, your library can demonstrate value, adapt to changing needs, and—most importantly—improve lives in your community. [PL](#)

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