ska+
SARAH KEISTER ARMSTRONG + ASSOCIATES

(224) 305-2701 | sarah@skaassociates.com
218 Greentree Parkway | Libertyville, IL 60048

December 21, 2022

Emily Kornak
Library Director
Lake Geneva Public Library
918 W. Main Street
Lake Geneva, WI 53147

Dear Emily:

Thank you for considering our enclosed proposal to provide strategic planning consulting services to Lake Geneva Public Library. We have closely followed the successes and innovations of your library over the years and remain impressed with your commitment to continual improvement of service for your community.

We view this project as an opportunity to contribute to that improvement through a process that studies, engages, and responds to the community. This aligns strongly with the philosophy of our firm and the approach we have implemented in our many successful strategic planning projects with public library clients.

Building a comprehensive library strategic plan requires a rigorous process of data gathering, analysis, stakeholder engagement, group facilitation, foresight, implementation, and evaluation. Our backgrounds in community outreach, data and statistical analysis, quantitative and qualitative evaluation, and planning for public libraries provide us with the expertise to provide end-to-end service in facilitating community-focused strategic planning projects.

Having previously completed a strategic planning facilitation project for LGPL, we maintain strong support for your continued success. We would relish the opportunity to help LGPL build upon its existing successes to best understand and serve your outstanding community. Please see our detailed proposal outlining a scope of work to facilitate this process. Thank you for your consideration.

Sincerely,

Sarah Keister Armstrong, Principal Consultant

BACKGROUND INFORMATION

OUR APPROACH TO STRATEGIC PLANNING

Sarah Keister Armstrong + Associates, LLC is a small, family-owned business that specializes in needs assessments and strategic planning, program evaluation, and communications for public libraries and nonprofit organizations. We embrace data and its value to telling an organization's story, communicating its impact, and identifying ways to improve upon its work. We understand the challenges facing today's libraries and excel in helping track the evolution of expectations between libraries and the communities they serve.

We believe it is essential that libraries have a focused understanding of the roles they play within their industry and communities they serve. Like other mission-driven organizations, libraries will be most successful when they maximize their relevance to their stakeholders. Thoughtful engagement with stakeholder groups and analysis of available data will guide the development of useful planning tools to support their missions and reflect the needs of those they serve.

Our approach to project management

- actively engages those meaningfully influenced by the project
- includes regular communication with project leads, and
- results in high-quality products that help organizations chart meaningful progress for the future.

Our philosophy as a firm is to be **lean, results-focused, efficient, and effective for our clients.** In working with public and nonprofit institutions, we maintain a strong commitment to **fiscal responsibility and accountability** to the stakeholders of the organizations we assist. We examine all aspects of projects through an **equity lens**.

Our inclusive approach strives to engage all parts of the stakeholder community as active participants in the process. To do so, we advocate using modern communications tools and innovative strategies, rather than top-heavy and expensive methods often recommended by larger and less nimble firms.

In projects such as these, we work not only for the organization but also on behalf of its stakeholders, facilitating a process that truly serves all. In working with public and nonprofit organizations, we tailor our services to the needs, desires, and philosophies of each organization.

QUALIFICATIONS

We have a strong track record of success in helping libraries accurately gauge their communities' desires and strategically craft responsive plans, goals, and evaluation metrics. Since incorporating in Illinois in 2013 (known as Turks Cap Consulting until 2016), SKA + Associates has completed dozens of actionable projects in a variety of fields, including strategic planning, program evaluation, needs assessment, grant writing and planning, and communications strategy and implementation.

The success of our work stems from our ability to design customized tools and processes, effectively implement them, and synthesize data intended to inform decision-making. This end-to-end servicing of client needs reflects our philosophy of working with clients to meet their needs rather than for clients using pre-packaged tools and methods.

We're proud to have led a number of successful assessment and strategic planning projects for public libraries with the belief that when their operations are aligned with identified needs, libraries can add tremendous value to the lives of their customers and communities. Our modern perspectives on how to collect, analyze, and communicate data-driven recommendations result in straightforward, dynamic documents that produce actionable results.

Key strengths we bring to strategic planning that would effect a meaningful impact on Lake Geneva Public Library's upcoming strategic planning project include:

- Deep familiarity with the core purposes of public libraries and their evolving roles within the communities they serve;
- Capacity to incorporate multiple methods of stakeholder engagement, promoting an inclusive planning process that maximizes their likelihood of successful implementation;
- Organized and timely project management, customized to the needs of our clients;
- Ability to effectively engage, challenge, and bring together organization stakeholders;
- Ability to facilitate discussion within a welcoming environment that encourages open conversation, thought processes, and progress;
- Substantial experience working with small- and mid-size Midwestern libraries;
- Trustee experience at local, regional, and statewide library organizations; and
- Foresight to connect implementation strategies and evaluation metrics with a newly created strategic plan.

A list of clients in the past three years enclosed as attachment. Selected clients include:

- Addison Public Library, Addison, IL
- American Library Association, Chicago, IL
- Arlington Heights Memorial Library, Arlington Heights, IL
- Bartlett Public Library, Bartlett, IL
- Burlington Public Library, Burlington, WI
- Chicago Brewseum, Chicago, IL
- Cicero Public Library, Cicero, IL
- City of Glendale, Glendale, WI
- Community Action of Skagit County, Mount Vernon, WA
- Cook Memorial Public Library, Libertyville, IL
- Deerfield Public Library, Deerfield, IL
- Delafield Public Library, Delafield, WI
- Dorchester Seniors, Summerville, SC
- ElderCare Lake County, Waukegan, IL
- Glencoe Public Library, Glencoe, IL
- Grayslake Public Library District, Grayslake, IL
- Hillside Public Library, Hillside, IL
- Jacksonville Public Library, Jacksonville, IL
- Lake Forest Public Library, Lake Forest, IL
- Le Mars Public Library, Le Mars, IA
- Lincolnwood Public Library, Lincolnwood, IL
- Matteson Area Public Library District, Matteson, IL
- McHenry Public Library, McHenry, IL
- Messenger Public Library, North Aurora, IL
- Mukwonago Public Library, Mukwonago, WI
- National Stuttering Association, New York, NY
- New Lenox Public Library, New Lenox, IL
- New Jersey Council for the Humanities, Camden, NJ
- Pekin Public Library, Pekin, IL
- Round Lake Area Library, Round Lake, IL
- Stillwater Public Library, Stillwater, MN
- South Milwaukee Public Library, South Milwaukee, WI
- Warrenville Public Library, Warrenville, IL
- Wheaton Public Library, Wheaton, IL
- Zion Benton Children's Service, Zion, IL

We regularly present and write on data collection, community engagement, and strategic planning to professional audiences and conferences, including the following:

- *Designing Effective Surveys*
  Presentation, Wisconsin/Illinois Library Users Group, June 2022
- *Embracing Strategic Planning as a Community Engagement Tool*
  Presentation, Nonprofit Learning Lab, Aug. 2021
- *Using Data for Storytelling: Data for Driving Strategy & Measuring Impact*
  Panel Presentation, Forefront and the Association of Consultants to Nonprofits, Feb. 2021
- *Embracing Strategic Planning as a Community Engagement Tool*
  Presentation, Lead the Way: Libraries at the Heart of Community Engagement, Nov. 2020
- *Strategic Planning for Small & Rural Libraries*
  Presentation, Illinois Heartland Library System, July 2019
- *Engaging Your Board, Staff and Community in Strategic Planning*
  Presented during the Wisconsin Library Association Trustee Training Week, Aug. 2017

PROJECT PLAN

The proposed scope of work includes two phases:

1. Data Collection & Assessment (February – May 2023), and
2. Strategic Plan Creation (May 2023 – August 2023).

STAGE ONE: DATA COLLECTION & ASSESSMENT

The primary objective of the first stage of the strategic planning project is to gather and analyze data, stakeholder input, and emerging research to help inform the development of the strategic plan during the second stage of the project.

TYPE OF DATA	DATA COLLECTION METHOD
Board of Trustees	Representation on planning team
Staff	Survey; representation on planning team
Community Leaders	Survey
Community Residents	Survey

→ *STAGE ONE SPECIFIC ACTIVITIES*

SURVEY OF LIBRARY STAFF

We believe that staff are critical to the success of any strategic plan and should be engaged in the strategic planning process. Learning from staff about the strengths and weaknesses of the library, as well as aspirations for its future success, will provide context to develop goals and strategies that will move the organization forward.

We propose conducting a survey of library staff to identify and better understand the needs and desires of the community through the perspectives of library staff. The survey will include a variety of questions to solicit feedback about these unmet needs, gauge satisfaction with current library operations, and explore the potential for increased efficiencies and improvements. We recommend the survey be distributed in a convenient electronic format to maximize the availability to all staff, including those with part-time schedules.

SURVEY OF COMMUNITY LEADERS

To delve deeper into insights gleaned from survey and demographic analyses and to ensure deep engagement with key segments of the community, we propose conducting a survey of representatives from organizations and institutions serving the Lake Geneva community. Examples may include:

- City of Lake Geneva;
- Lake Geneva Board of Park Commissioners;
- Lake Geneva Historic Preservation Commission;
- Geneva Lake Museum;
- VISIT Lake Geneva (Lake Geneva Chamber of Commerce and Lake Geneva Area Convention & Visitors Bureau);
- Local public and private schools and parent organizations;
- Friends of the Lake Geneva Public Library;
- Geneva Lake Arts Foundation;
- Local homeowners associations and neighborhood groups; and
- Various faith-based organizations.

Deliberately soliciting this input will provide an opportunity to encourage productive conversation, spark realistic potential action steps and goals, and build community consensus about the library's potential role in serving unmet community needs.

SURVEY OF COMMUNITY MEMBERS

To guide the development of the library's new strategic plan in a way that leads the library forward in a visionary manner and is responsive to the needs of its community, we propose a community survey.

A community survey will be designed to gauge not only residents' current use of the library, but also what is desired in future library service. The survey will be created following best practices and may contain questions including, but not limited to, those regarding use (and non-use) of the library; barriers to increased use of facilities, services, and programs; use of technology; space-related needs; and the library's collection.

Demographic questions such as age, household size, and educational attainment may allow for more detailed analysis of the community needs and usage of different segments of the population. Open-ended questions will provide respondents with opportunities to provide their own unrestricted feedback.

Survey Dissemination

Surveys will be administered via email using the library's existing email distribution list and also posted on the library's website and social media networks. If in alignment with newsletter distribution schedules, the library may wish to include promotion and/or tear-out surveys in its newsletter. We can provide recommendations regarding additional marketing and communications strategies to achieve high engagement and reach non-customers.

It is recommended that a nominal prize, such as gift card(s) to local restaurants, be offered by the library to attract attention to the survey and increase the response rate. *If offering prizes, SKA + Associates will furnish the cost of prizes up to $300*. If desired, we also can facilitate additional means of survey distribution, such as direct mail promotion, for an additional fee. We encourage the following strategies for increasing reach to members of the community who may not access the survey directly through the library's communications channels:

- Physical copies of the questionnaire can be distributed to avoid alienation of residents who do not use computers or who would prefer to fill out a paper questionnaire rather than online;
- Physical copies of the survey and access to the online version also may be made available to local schools and community organizations for increased outreach to encourage participation in the survey by non- and infrequent customers of the library;
- SKA + Associates will provide a Spanish-language version of the survey and can work with the library for additional translations if needed;
- We encourage other community organizations to share the link to the online survey and promote it among their networks; and
- We can assist in identifying and connecting with organizations to assist in reaching members of the community who may be underrepresented or difficult to reach through the library's existing communication infrastructure, such as those serving immigrants, older adults, members of underrepresented racial and ethnic groups, and individuals and families who are under-resourced.

This process will provide opportunities for the library to determine its strengths, its appeal, and which segments of the community may be underrepresented in library usage, as well as determining the most effective means of communicating with the community.

Survey Development and Collection Process

We recommend the following process for survey design, dissemination, and analysis:

1. Consultant discusses potential survey question topics with library administration and develops draft of the survey in online (e.g., using SurveyMonkey) and printable form.
2. Once finalized, library staff distribute the survey via library email distribution list, social media, and website and provide hard copies at various points of service within the library facility (circulation, youth area desk, etc.) and at community locations as applicable.
3. After the open survey period concludes, library staff will provide any hard copies of the survey to consultant.
4. Consultant will input and analyze data, compiled in a written report provided to library.

Areas of Survey Inquiry

We will lead the design of survey questions and the development of the survey tool to provide answers to the following areas of inquiry:

1. What are the strengths that the board and staff can leverage for continued success?
2. Where do gaps in exist within current library resources, programs, and services that are within the purview of the library's mission and vision?
3. Where do gaps exist in community services that the library may have a role in filling?
4. What implication does the community's current and anticipated future use of the library have on the library's physical space?
5. How can library services be effectively structured to those in unserved and underserved communities within the service area of LGPL?
6. What role do community members envision for the library in a post-COVID world? Do gaps exist within community services since COVID that the library can fill?
7. What barriers prevent residents from maximizing their use of the library?
8. What communication methods and messages best suit the furthering of LGPL's mission?

→ *STAGE ONE TIMELINE*

Meetings and listening sessions are intended to be conducted virtually.

February 2023	Conduct staff survey.
March – May 2023	Conduct community leaders survey. Conduct community members (residents) survey. Develop and submit written report of findings from the Data Collection & Assessment stage.

→ *STAGE ONE DELIVERABLES*

- Written report detailing the findings from each of the components of phase one, including an executive summary of overarching trends.

STAGE TWO: STRATEGIC PLAN CREATION

The primary objective of this second stage of the strategic planning project is to develop a comprehensive strategic plan.

→ *STAGE TWO SPECIFIC ACTIVITIES*

Please note: We recommend that the composition of the strategic planning team and/or participants of the sessions listed below include key staff and board members of LGPL. We welcome the opportunity to further collaboratively structure this stage of the project in a format that best meets the needs of the library.

FACILITATE PLANNING SESSION I: We will facilitate the first of two planning sessions with the library's Board of Trustees and staff representatives to develop goals that focus on the library's next steps within the next five years. This session will include a review of the Data Collection & Assessment stage and will focus on identifying priority areas, strategies, and initial tactics that support their achievement.

FACILITATE PLANNING SESSION II: We will facilitate the second of the project's two planning sessions to finalize the mission, vision, values, priority areas, strategies, and initial tactics discussed during the first planning session. This second session will provide an opportunity to identify actionable steps that can be connected to specific roles, timelines, and metrics.

→ *STAGE TWO TIMELINE*

These two planning sessions are intended to be conducted in-person and can be conducted virtually if preferred. Additional meetings may be conducted virtually at no additional cost.

May – June 2023	Facilitate first planning session. Following the session, prepare and disseminate draft of strategic plan.
June – July 2023	Facilitate second planning session.
August 2023	Disseminate draft plan to planning team.

→ *STAGE TWO DELIVERABLES*

- A comprehensive strategic plan, including an executive summary.

KEY PERSONNEL

SARAH KEISTER ARMSTRONG, PRINCIPAL CONSULTANT

Sarah has provided evaluation, strategic planning, and grant writing consulting services to public and nonprofit organizations since 2013. She brings experience in statistical analysis and using quantitative and qualitative measures to evaluate public policies and programs.

Her expertise helps organizations effectively collect and analyze meaningful data, determine the implications of data on organizations' planning goals, and communicate the nexus of data, planning, and action. Her work as a trustee of library organizations at the local, regional, and statewide level in Illinois has positioned her at the forefront of change within the industry.

Sarah regularly presents to professional audiences about strategies to successfully incorporate data-driven practices into their community engagement and planning work.

Key qualifications

- Master of Public Policy and Administration, University of Massachusetts Amherst
- Bachelor of Arts degree in Political Science and Sociology, Illinois Wesleyan University
- Recipient of the federal government's prestigious Presidential Management Fellowship
- Former trustee of Illinois Library Association, Reaching Across Illinois Library System, and Fremont Public Library District
- Professional experience in program evaluation, grants management, and policy assessment in federal, regional and state-level offices

REFERENCES

Michelle Krooswyk
New Lenox Public Library
New Lenox, Illinois
mkrooswyk@newlenoxlibrary.org
815-655-2526

Shirley Taylor
Le Mars Public Library
Le Mars, Iowa
shirley.taylor@lemars.lib.ia.us
712-546-5004

Amy Franco
Hillside Public Library
Hillside, Illinois
afranco@hillsidelibrary.org
708-304-9300

DAN ARMSTRONG, PRINCIPAL CONSULTANT, COMMUNICATIONS

Dan is co-principal of the firm and leads its communications services work. He is a trained librarian and skilled information professional with over a decade of experience leading communications and community engagement efforts for educational and nonprofit organizations. His work includes substantial experience in developing and implementing public relations, community engagement, and social media strategies.

Key Qualifications

- Master of Library and Information Science, Dominican University
- Bachelor of Arts in English-writing and Sociology, Illinois Wesleyan University
- Professional experience in higher education and social services nonprofit communications
- Began career in journalism, covering a broad array of topics
- Seven years as director of communications for nationally recognized K-12 school district
- Numerous statewide awards for writing, publication design, and multimedia production
- Guest speaker in secondary and college courses and Cub Scout leader

PROPOSED COSTS

Sarah Keister Armstrong + Associates sets its fees as total project costs, which include labor and materials used by Sarah Keister Armstrong + Associates. The total project cost of the approach and work schedule outlined above is not to exceed $10,000.

The project will be invoiced as follows: 30% at contract award and 40% at the completion of the Data Collection & Assessment stage, and 30% at project completion.

CONTACT INFORMATION

Sarah Keister Armstrong, Principal Consultant
Sarah Keister Armstrong + Associates, LLC
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(224) 305-2701
sarah@skaassociates.com
www.skaassociates.com

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SELECTED CLIENT LIST

Burlington (WI) Public Library
Strategic plan creation; 2018-19; 12 employees; Joe Davies, Library Director; 166 E. Jefferson Street, Burlington, WI 53105; (262) 342-1130; jdavies@burlington.lib.wi.us

Chicago Brewseum
Strategic plan creation; 2021-22; 35 employees; Liz Garibay, executive director; lizgaribay@yahoo.com

Cicero Public Library
Strategic plan creation; 2021-22; 28 employees; Sandra Tomschin, director; 5225 West Cermak Road, Cicero, Illinois 60804; (708) 652-8084; stomschin@cicerolibrary.org

City of Glendale/North Shore Library
Community needs assessment; 2021; 13 employees; Rachel Safstrom, City Administrator; 5909 N. Milwaukee River Pkwy, Glendale, WI 53209; (414) 228-1714; r.safstrom@glendalewi.gov

Dorchester Seniors Inc.
Strategic plan creation; 2021-22; 25 employees; Leigh M. Thomson, Executive Director; 312 N. Laurel St., Summerville, SC 29483; LThomson@dorchesterseniors.com

Grayslake Public Library
Strategic plan creation; 2019-20; 34 employees; Sara Brown, Library Director; 100 Library Ln, Grayslake, IL 60030; (847) 223-5313; sbrown@grayslake.info

Hillside Public Library
Strategic plan creation; 2021-22; 10 employees; Amy Franco, Executive Director; 405 N Hillside Ave, Hillside, IL 60162; (708) 304-9300; afranco@hillsidelibrary.org

Jacksonville Public Library
Strategic plan creation; 2018-19; 10 employees; Chris Ashmore, director (ret.)

Le Mars Public Library
Strategic plan creation; 2021-22; 7 employees; Shirley Taylor, Library Director; 46 First Street SW, Le Mars Iowa, 51031; (712) 546-5004; shirley.taylor@lemars.lib.ia.us

McHenry Public Library
Strategic plan creation; 2018-19; 36 employees; James Scholtz, Executive Director; 809 N Front Street, McHenry, IL 60050-5578; (815) 385-0036; jscholtz@mchenrylibrary.org

(224) 305-2701 | sarah@skaassociates.com
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National Stuttering Association
Strategic plan creation; 2022; 20 employees; 3285-B Richmond Avenue #119, Staten Island, NY 10312Tammy Flores, Executive Director; tflores@westutter.org; 800-937-8888

New Jersey Council for the Humanities
Strategic plan creation; 2021-22; 6 employees; Dr. Carin Berkowitz, Executive Director; 336 Friends Street, Camden, NJ 08102; (609) 695-5318; cberkowitz@njhumanities.org

New Lenox Public Library
Strategic plan creation; 2022; 26 employees; Michelle Krooswyk, Executive Director; 120 Veterans Parkway, New Lenox, IL 60451; (815) 655-2526; mkrooswyk@newlenoxlibrary.org

Pekin Public Library
Strategic plan creation; 2018-19; 18 employees; Jeff Brooks, Director; 301 S 4th St, Pekin, IL 61554; (309) 347-7111; jbrooks@pekinpubliclibrary.org

River Grove Public Library
Community needs assessment; 2021; 8 employees; Robert Conway, president; 8638 Grand, River Grove, IL 60171; Trusteeconway@rivergrovelibrary.org

South Milwaukee Public Library
Strategic plan creation; 2022; 8 employees; Tristan Marshall, Library Director; 1907 10th Ave, South Milwaukee, WI 53172; (414) 768-8195; Tristan.Marshall@mcfls.org

Stillwater Public Library
Strategic plan creation; 16 employees; Mark Troendle, President; 224 Third Street North, Stillwater, MN; mtroendle@ci.stillwater.mn.us

Warrenville Public Library
Strategic plan creation; 2018-19; 19 employees; Sandy Whitmer, Director; 28W751 Stafford Place, Warrenville IL 60555; (630) 393-1171; director@warrenville.com

Watertown Public Library
Strategic plan creation; 2018-19; 15 employees; Peg Checkai, Library Director; 100 S. Water St. Watertown, WI; (920) 262-4090; pcheckai@watertownpubliclibrary.org

Wheaton Public Library
Strategic plan creation; 2018-19; 50 employees; Betsy Adamowski, Executive Director; 225 N. Cross Street, Wheaton, IL 60187; 630-668-1374; betsy@wheatonlibrary.org

STRATEGIC PLAN

10-YEAR VISION

Strategic Direction #1: Provide more physical space and develop capacity to respond to the needs and priorities of our evolving community.

Strategic Direction #2: Boldly embrace the library's essential role in fostering reading and all forms of literacy for the Le Mars community.

Strategic Direction #3: Ensure sustainability of the organization by attracting and nurturing users from youth into adulthood.

OUR MISSION

The Le Mars Public Library is an essential community resource that encourages the love of reading, the desire for learning and the growth in minds and in the community.

3-5 YEAR STRATEGIC PLAN

GOAL #1: STRENGTHEN ENGAGEMENT WITH UN- AND UNDER-SERVED COMMUNITY MEMBERS.
Attract new users by ensuring linguistic and cultural relevance to all community members.

- Strategy 1: Increase collection to align with demographic shifts
- Strategy 2: Increase outreach to non- and limited English-speakers within the community
- Strategy 3: Examine and reconsider library policies to ensure inclusive access
- Strategy 4: Ensure staff has the capacity to meet the needs of our diverse community

GOAL #2: EXPAND ACCESS TO TECHNOLOGY.
Increase technology literacy of users of all ages to effectively and appropriately use technology to communicate and access information.

- Strategy 1: Expand e-library and publicize availability of e-materials
- Strategy 2: Facilitate access to technology appropriate for users of different skill levels
- Strategy 3: Ensure staff have the skills to support public use of e-resources and technology

GOAL #3: SERVE THE COMMUNITY BY BOLDLY PURSUING EXCELLENCE AND GROWTH.
Leverage the strong support of the Le Mars community to enhance the library's value to our users.

- Strategy 1: Strengthen partnerships with Friends and other community organizations to expand reach and extend resources
- Strategy 2: Continue providing exceptional customer service that exceeds expectations
- Strategy 3: Lead and support our community's continued growth through bold literacy and lifelong learning initiatives

GOAL #4: ENHANCE MARKETING/COMMUNICATIONS TO BOLSTER AWARENESS AND UNDERSTANDING.
Leverage existing strengths to attract new users and increase the community's familiarity with the full range of materials and services.

- Strategy 1: Enhance existing marketing efforts to meet the community's preferences for email, text, and other digital communications
- Strategy 2: Create marketing plan to review, evaluate, and improve current efforts
- Strategy 3: Evaluate staffing needs to ensure high-quality, consistent and effective strategic communication

ACTION STEPS

GOAL #1: STRENGTHEN ENGAGEMENT WITH UN- AND UNDER-SERVED COMMUNITY MEMBERS.

Attract new users by ensuring linguistic and cultural relevance to all community members.

Strategy 1: Increase collection to align with demographic shifts

Strategy 2: Increase outreach to non- and limited English-speakers within the community

Strategy 3: Examine and reconsider library policies to ensure inclusive access

Strategy 4: Ensure staff has the capacity to meet the needs of our diverse community

SHORT-TERM	LONG-TERM
» *Identify a bilingual storytime lead* » *Shift Spanish language section to more prominent location* » *Work to be a welcoming place to people new to Le Mars* » *Add more support materials for English Language Learners and promote collection to local organizations.*	» *Provide bilingual story time for Summer Reading 2022*
» *Identify community partners to assist in outreach to unserved/underserved populations* » *Ask community partners to help promote Summer Reading Program*	» *Set-up a community task force with partners to meet regularly and discuss needs of new residents/underserved residents.* » *Implement programs using our language resources: Multilingual Club, ELL Conversation group, etc.*
» *Provide Trustees with training on the impact of library policies* » *Research best practices regarding how other libraries have increased access*	» *Create a schedule to revise current policies at Monthly Board meetings.*
» *Locate online training options to promote EDI* » *Encourage training current staff in Spanish, specifically in library operations vocabulary, and hiring more multilingual staff*	» *Work with the city to provide city-wide training on diversity* » *Have Spanish/other language speaking staff on staff for most open hours in a week*

GOAL #2: EXPAND ACCESS TO TECHNOLOGY.

Increase technology literacy of users of all ages to effectively and appropriately use technology to communicate and access information.

Strategy 1: Expand e-library and publicize availability of e-materials

Strategy 2: Facilitate access to technology appropriate for users of different skill levels

Strategy 3: Ensure staff have the skills to support public use of e-resources and technology

SHORT-TERM	LONG-TERM
» *Develop a schedule to promote eResources* » *Create classes focusing on the use of library resources from devices to support promotion.*	» *Take training for eResources off-site to engage schools, businesses, etc.*
» *Determine high impact/low effort options. (eBooks, Databases)* » *Identify staff with skills to provide this training*	» *Develop a calendar for classes to be held in Fall 2022/Winter 2023* » *Determine next level of high impact/moderate effort classes to target on next level of training* » *Offer designated hours each week for some staff to be available for walk-in technology assistance, or scheduling a staff member by appointment for assistance.*
» *Encourage staff to attend online training sessions on eResouces* » *Have select staff take necessary training.*	» *Encourage staff to have competency in all in-house technologies, as well as databases*

	SHORT-TERM	LONG-TERM

GOAL #3: SERVE THE COMMUNITY BY BOLDLY PURSUING EXCELLENCE AND GROWTH.

Leverage the strong support of the Le Mars community to enhance the library's value to our users.

Strategy 1: Strengthen partnerships with Friends and other community organizations to expand reach and extend resources

Strategy 2: Continue providing exceptional customer service that exceeds expectations

Strategy 3: Lead and support our community's continued growth through bold literacy and lifelong learning initiatives

SHORT-TERM	LONG-TERM
» *Equip trustees with the resources to promote the library in the community (video clips/handouts/brochures, etc.)* » *Designate a library representative to attend downtown planning sessions, etc.* » *Equip staff to provide training on library resources off-site (Head Start/Schools/Businesses)*	» *Set a target of 2 presentations per Trustee for FY23*
» *Continue to train staff on customer service, including helping with reader's advisory and e-resources* » *Provide effective on-boarding / staff orientation* » *Assess library staff pay in current economic climate* » *Assess methods of staff recruitment and retention and areas for improvement*	» *Continue to provide adequate staffing for library hours & programs*
» *Attend regional, state and national conferences to gain ideas for implementation*	

GOAL #4: ENHANCE MARKETING/COMMUNICATIONS TO BOLSTER AWARENESS AND UNDERSTANDING.

Leverage existing strengths to attract new users and increase the community's familiarity with the full range of materials and services.

Strategy 1: Enhance existing marketing efforts to meet the community's preferences for email, text, and other digital communications

Strategy 2: Create marketing plan to review, evaluate, and improve current efforts

Strategy 3: Evaluate staffing needs to ensure high-quality, consistent and effective strategic communication

SHORT-TERM	LONG-TERM
» *Evaluate strengths and weaknesses of library website* » *Create plan for an email newsletter, also available through the website*	» *Ensure email newsletter has plenty of content for release on at least a quarterly basis.* » *Change website layout and information to best serve the needs of patrons.*
» *Research existing library marketing plans* » *Identify components of marketing plan* » *Assess effectiveness of library brand and messaging and if it is consistent among our print, in-house, and online resources*	» *Develop marketing plan with goals* » *Update existing materials to reflect vision and brand of library, including but not limited to the website, brochure, and social media posts*
» *Benchmark the library against peers in state & nation wide.* » *Evaluate internal communication and find any areas for improvement.*	

Le Mars PUBLIC LIBRARY

EVALUATION

	DESIRED OUTCOMES	INDICATORS	SOURCES
GOAL #1: STRENGTHEN ENGAGEMENT WITH UN- AND UNDER-SERVED COMMUNITY MEMBERS.			
Attract new users by ensuring linguistic and cultural relevance to all community members.	*Increased library usage by underserved community members*	**1.** *10% of Summer Reading participants are first-time participants each year.* **2.** *75% of Summer Reading survey respondents will report that they want to use the library more often.*	» *Project Outcome* » *Staff survey* » *Circulation statistics* » *Summer Reading participant data*
GOAL #2: EXPAND ACCESS TO TECHNOLOGY.			
Increase technology literacy of users of all ages to effectively and appropriately use technology to communicate and access information.	*Increased technology and information literacy within the Le Mars community*	**1.** *75% of digital learning participants will report that they feel more knowledgeable about using digital resources.* **2.** *Usage of e-materials will increase by 25% in three years.*	» *Project Outcome* » *Staff survey* » *E-material circulation statistics*
GOAL #3: SERVE THE COMMUNITY BY BOLDLY PURSUING EXCELLENCE AND GROWTH.			
Leverage the strong support of the Le Mars community to enhance the library's value to our users.	*Continue offering and attracting participants in robust learning opportunities and resources.*	**1.** *80% of 1,000 Books Before Kindergarten participants will report that they used additional library resources.* **2.** *75% of education/lifelong learning survey respondents will report that they intend to apply what they just learned.* **3.** *75% of education/lifelong learning survey respondents will report that they learned something new and helpful.*	» *Project Outcome* » *Annual customer service survey*
GOAL #4: ENHANCE MARKETING/COMMUNICATIONS TO BOLSTER AWARENESS AND UNDERSTANDING.			
Leverage existing strengths to attract new users and increase the community's familiarity with the full range of materials and services.	*Increased awareness of library's resources, services, and programs.*	**1.** *75% of education/lifelong learning survey respondents will report that they are more aware of resources and services provided by the library. 3. The library will embrace one new social media platform* **2.** *Le Mars Public Library Facebook followers will increase by 10% each year.*	» *Project Outcome* » *Social media statistics and website usage*

Le Mars PUBLIC LIBRARY

Proposal for Lake Geneva Public Library

Strategic Planning Consultant

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Team Experience

Lake Geneva Public Library

WiLS is a mission and member-driven non-profit based in Wisconsin, though we have members in other states. We facilitate collaborative projects and services to save our members time and money and to advance library service. Most of our members are libraries, but we also work with cultural institutions, government agencies, and other non-profits to develop partnerships and projects.

Over eight years ago, we launched our Consulting Services to provide affordable, expert guidance on building library resilience, primarily through planning. We have focused much of our consulting efforts – which includes over forty strategic plans with public libraries and library systems – on building strategic planning processes that can be scaled to meet the needs of our library partners. WiLS is a seasoned project manager. We value and demonstrate open communication, a commitment to being prepared, and a flexible outlook to ensure the process is working for our partners, rather than our partners working for the process. We have managed large scale, multi-year projects as well as projects with a short, intense timeframe. In every project, with every library, we center the community's voice in the process outcomes.

While the Lake Geneva Public Library will work with our entire consulting team, the main point of contact will be Laura Damon-Moore, Library Strategist and Consultant.

Our strategic planning process starts with building strong relationships with our partners. While we propose a plan review and refresh process that we have confidence will result in a clear, achievable path forward, we will work with the Lake Geneva Public Library staff and stakeholders to finetune all processes to ensure our services fit the library's needs.

Key Personnel

Lake Geneva Public Library

When you hire us, you get the whole team. WiLS' service experts have diverse skills and experiences and can be brought in, as needed, on any project. This keeps us flexible and

responsive to the needs of different projects and helps us keep our eyes on the horizon of emerging and innovative practices from various vantage points.

Melissa McLimans, Consulting Team Lead, has nearly six years of experience leading strategic planning processes with public libraries and library systems. Melissa has worked with dozens of libraries and community stakeholders to develop, complete, and implement achievable strategic plans that reflect the needs of the organization and its stakeholders. Melissa is well-experienced in data collection, including administering community surveys, leading focus groups, and conducting interviews, as well as facilitating planning meetings and writing strategic plans. She has a deep knowledge of library and library system needs.

Laura Damon-Moore, Library Strategist & Consultant, partners with her WiLS consulting team colleagues to offer manageable and dynamic planning projects that are community and asset-based. She brings a background in community engagement, community-led program development, and youth services, as well as significant project coordination, communications, and writing experience as co-founder of the Library as Incubator Project and @IArtLibraries. In addition, Laura has a certificate in Asset-Based Community Development (ABCD), which she uses as a lens for much of her work with libraries.

Kim Kiesewetter, Data Analyst & Consultant, works on a variety of library-centric, data-driven projects with the WiLS consulting team. She brings with her over a decade of research and evaluation experience. Her background in the social sciences provides a foundation for her work, including extensive training in evaluation, research methods, and statistical analysis. Her approach to projects is warm, open, and accessible and focuses on intuitive and accessible deliverables.

Project Approach & Management Plan

Lake Geneva Public Library

WiLS, in partnership with Lake Geneva Public Library, will provide services in support of developing a refreshed strategic plan for the organization. Drawing from our experience working

with dozens of libraries on strategic planning processes, WiLS has crafted a streamlined yet dynamic process that optimizes efficiency and cost through a hybridized format of virtual and in-person meetings while still being comprehensive in scope. Our proposals are built with an "a la carte" approach in mind that offers flexibility in design to meet organizational need(s). The table below outlines a comprehensively designed approach based on the RFP for this strategic planning refresh process and its anticipated scope:

Project Phase & Associated Activities	Description	Timeline and WiLS Hours
Communication Work	Time held for communication with the main point(s) of contact for the project.	Ongoing (average of 1 hour a month = 6 hours total)
Phase 1: Setting the Table	In this phase, we kick off the strategic planning review and revision process with a look at community demographics and a questionnaire of the planning team to understand goals and needs. At a virtual kick-off meeting with the strategic planning team, we will get to know each other, discuss the process, and begin to develop a stakeholder map.	July 2023 (11 hours)
Demographics	The demographics process provides a snapshot of the library's service area/community demographics, pulling from different federal and state data resources. The information gathered during this process will be used by the planning team to develop their stakeholder map and to inform any revisions to the previous plan.	3 hours
Library Planning Team Landscape Questionnaire	WiLS will develop and administer a questionnaire to the planning team to help assess progress from their point of view on the previous plan's goals and priorities. There are also questions to understand if, and how, community priorities and needs have shifted since the previous plan. The information gathered will be used to identify areas of exploration and as a data set to use in the plan revision process.	3 hours
Kick-Off with Stakeholder Mapping (Virtual)	WiLS will facilitate a kick-off meeting with the planning team. This agenda will engage the group in a stakeholder mapping exercise to help the planning	5 hours

		team populate focus groups and to determine where and how a community survey might be shared.	
Phase 2: Learning about the Library and Community		We believe that hearing directly from library stakeholders and reliable data and information can help your library make the best decisions for its future. In this phase, we propose using a hybrid approach to ensure equity and keep costs reasonable. This means we will gather information virtually and in-person, synchronously and asynchronously to engage staff and community members where it will make the biggest impact.	July - September 2023 (50 - 57.5 hours)
	Staff Involvement: Focus group(s)	WiLS will coordinate a process and facilitate 1-2 1-hour focus group(s) with library staff to gauge progress on the previous plan's goals from their points of view, and to hear from them about community needs and opportunities they see for the library going forward. WiLS will document and theme information gathered to be shared with the planning team as part of the information gathered for revising the strategic plan. (*Note: This can be done in-person or virtually and prices are supplied for both. If multiple focus groups are needed, these can happen on the same day to help with cost.*)	5 hours (virtual) 7.5 hours (in-person, includes travel costs)
	Board involvement: Focus group	WiLS will coordinate a process and facilitate a 1-hour focus group with library board members to gauge progress on the previous plan's goals from their points of view, focusing on the following topics: • Library facility • Accessibility • Community engagement • Outreach and to hear from them about community needs and opportunities they see for the library going forward. WiLS will document and theme information gathered to be shared with the planning team as part of the information gathered for revising the strategic plan. (*Note: This can be done in-person or virtually and prices are supplied for both. If multiple focus groups are needed, these can happen on the same day to help with cost.*)	3 hours (virtual) 5.5 hours (in person, includes travel costs)

	Data Dashboard (Virtual)	The planning team will be given access to a dashboard created and hosted by WiLS. This dashboard takes DPI Annual Report data and puts it into a visualized format that allows you to see an individual library's data for up to the previous five years and a look at your library compared to a cohort average of similar libraries, identified through statistical modeling. The dashboard also includes some basic descriptive statistics of certain measures. This includes access to the dashboard for the period of the project as well as an hour-long tutorial with WiLS' Data Analyst to walk planning team members through how to use the dashboard.	5 hours
	Community Conversations	WiLS, with assistance from the library, will coordinate at least two 1.5-hour community conversations with selected community participants to ask questions about the following: ● Library facility ● Accessibility ● Community engagement ● Outreach and to hear about current community needs and priorities. WiLS will provide a facilitator to lead the conversation, and a notetaker to document the input gathered during the conversations. WiLS will compile and theme the results of the conversation. Based on the library's needs, WiLS recommends two community conversations. *Note: These can be done in-person or virtually. Hours are supplied for both.*	9 hours for two conversations (virtual) 11.5 hours for two conversations (in-person, includes travel time)
	Community Survey	WiLS will partner with the library to create a community survey that asks a handful of high-level questions related to the previous plan's goals and priorities to gauge the community's perspective on the library's plan progress. The bulk of this survey would focus on questions more directly related to current community needs and priorities, to assist the library in understanding how those needs and priorities could translate to the library's physical space.	16 hours

	Data Webinar (Virtual)	WiLS will develop and deliver a 1.5-hour webinar to review the data and information gathered about the previous plan, as well as current community needs and priorities, with the library planning team before the strategic plan development meeting. The team will be provided a slide deck of the compiled information along with the data used for the slide deck.	12 hours (virtual)
Phase 3: Plan Development		It is in this phase the data and information come together to inform any revisions to the current strategic plan framework. After viewing the data webinar, the planning team will identify key themes, and we will work with the group to review the current goals and priorities for the library's strategic plan and make any necessary updates or revisions. We will draft a refreshed plan, develop feedback mechanisms, and make changes based on stakeholder feedback.	October-November 2023 (30-35 hours)
	Theming Worksheets	WiLS will provide planning team members with a worksheet to capture their ideas about themes and important ideas that emerged during the data and information gathering phase. These worksheets will be used to develop suggestions for revisions to the strategic goals and priorities of the current plan.	Hours are part of the framework meeting
	Framework Meeting (In person)	WiLS will develop processes and provide facilitation services for a 4-hour strategic plan refresh meeting of the library strategic planning team. The result of this meeting will be the finalization of refreshed strategic goals and priorities. *This meeting can be virtual, but we recommend in-person if possible. Cost reflects an in-person meeting.*	14 hours (includes travel)
	Plan Writing	WiLS will compile the results of the planning meetings to include with other documentation (including, when relevant, the data and information gathered, assessed and summarized during the course of the planning process) to develop and write a refreshed strategic plan document. WiLS will coordinate a schedule with the library to finish writing the plan and obtain any feedback from appropriate stakeholders. WiLS allocates 16 hours for writing the refreshed strategic plan document. If additional writing time is requested beyond the 16 hours, an adjusted cost for this component will be required.	16 hours

	Graphic Design and Editing Process - **Optional**	When the draft is nearing completion, WiLS will add desired graphic design elements and will provide the library an easy mechanism to share photos and graphics they would like included in the final plan document.	5 hours (optional)
Phase 4: Plan Activation - Optional		Regular assessment and evaluation of your plan can provide clarity on implementing your refreshed strategic plan and seeing your library's achievements of its goals. Working with WiLS' data analyst, the library will learn how to set meaningful benchmarks and assess its strategic plan efforts. This will include a two-hour training session with up to 6-8 staff and board participants and tools and templates to easily and routinely assess efforts.	December 2023 (12 hours – optional)

Schedule of Costs

Lake Geneva Public Library

Project Cost

Costs per phase of the project are outlined in the table below.

Project Phase	Cost
Communication Work	**$691.50**
Phase 1: Setting the Table	**$1,212.75**
Phase 2: Learning About the Library and Community	**$5,512.50 - $6,339.40**
Phase 3: Plan Development	**$3,307.50 - $3,858.75**
Phase 4: Plan Activation (optional)	***$1,323.00***
TOTAL OUTLINED PROJECT COST (phase 4 not included)	**$10,724.25 - $12,102.40***

***The higher total reflects more in-person work and includes travel time and mileage (150 minutes travel plus mileage is $362.40 per trip) for the staff focus groups, two community conversations, the framework development meeting, and the presentation of the plan to stakeholders, as well as the optional graphic design support. We are happy to customize the process to your library's needs. This higher total would not be exceeded.

The prices and timeline in this proposal are locked in for 60 days from the date of sharing. Should the library need more time to make a decision, WiLS may need to revise the proposal.

Statement of Performance

Lake Geneva Public Library

WiLS' work philosophy is evident in our mission:

> *We believe libraries, cultural institutions, and their partners make the world a better place. We build relationships and provide services so they can do more with their time and money. We help our members turn ideas into action.*

We work hard so our project partners can have more, do more, and be more for their communities. We harness our internal expertise, bringing in staff and their skills as the project requires, as well as expertise from among our partners if needed, to get the work done, to do it well, and to do it affordably.

Our organizational values guide our work. We are optimistic and direct, unafraid to learn from our own occasional mistakes, and will ask after your families and pets. We sincerely care about your mission, we will do our best to support it, and we want our working relationship to continue after the project outputs are delivered; we want you to work with us again and collaborate with our members and partners. We will learn from and with you as we work together. We believe that we are all in this together and that a strong community of practice amplifies work.

Strategic Planning References

Lake Geneva Public Library

Trisha Smith, Director | Germantown Community Library

Email: smithp@germantownlibrarywi.org
Phone: (262) 253-7760
Description of work: WiLS worked with the Germantown Community Library to complete a strategic plan that involved library staff, board members, and community members through a SOAR conversation with mission statement work, a questionnaire, community survey, and community conversations.

Susan Heskin, Director | Superior Public Library

Email: heskins@ci..wi.us
Phone: (715) 394-8876
Description of work: Completed a 5-year strategic plan (2020-2024). The planning process included a community survey, board engagement, staff engagement, annual report data analysis, community demographics, and community conversations. Superior Public Library is a member of the City Library Collective, which WiLS project manages.

Bruce Gay, Director | Waukesha Public Library

Email: BGay@waukesha-wi.gov
Phone: (262) 524-3681
Description of work: Completed a 5-year strategic plan (2019-2023) with the library that included a community survey, staff engagement, annual report data analysis, community demographics, and training the staff on performing community conversations. Additionally, WiLS worked with the library staff to develop a mission statement and library service values.

Example of Strategic Plan Work

Lake Geneva Public Library

WiLS has worked with over forty libraries to create affordable, actionable strategic plans. The recent plan included here is an example of that work, representing WiLS' ability to provide responsive, community-centered services to a variety of libraries using customized approaches to strategic planning.

Germantown Community Library (2021)
In this strategic planning process, Germantown Community Library wanted to ensure ample opportunities for community and stakeholder input and to generate buy-in and support for a potential new building or expansion project. Three community conversations with a variety of stakeholder groups, a community leader questionnaire, a community survey, and a staff SOAR served as important channels for gathering ideas and for communicating about the library's work with people across the Germantown community and beyond. Note that Germantown Community Library was responsible for the final graphic design of their plan.

Fesemyer Consulting, LLC

Lake Geneva Public Library: Strategic Planning Proposal December 19, 2022

CINDY FESEMYER
OWNER & PRINCIPAL
FESEMYER CONSULTING, LLC
608.443.6362 • FesemyerConsulting@gmail.com
Madison, WI

Fesemyer Consulting, LLC

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Dear Director Kornak,

I am pleased to submit this proposal to the Lake Geneva Public Library for strategic planning services. I am the founder and lead consultant for Fesemyer Consulting LLC, a small consulting firm specializing in assisting libraries with focused, flexible planning processes to increase their performance and impact. In addition to 3 years of strategic planning consulting, I have nearly 10 years experience with library management and coaching services, as well as staff and trustee training.

This proposal details a strategic planning process, grounded in current theory, that will get to the heart of the community's aspirations for your beautifully renovated library. We will review and refresh your 2019-2021 plan with new goals and priorities based on Board, staff, and community input. The planning process is tailored to meet Lake Geneva Public Library and community needs and is not a cookie-cutter approach. Together we will craft community-based goals and priorities that meet community wants and needs and will guide the Lake Geneva Public Library decisively forward.

Deliverables include:

- A Community Assessment data report with updated census and demographic data, community survey results, and focus group and interview recommendations
- The 2023-2026 Strategic Plan
- A graphical one-page plan for clear stakeholder and community communication, to be co-created in accordance with your library's marketing standards

With extensive group facilitation experience, a passion for public libraries, geographical proximity, and expertise in clear, open communication styles, I will be an ideal partner with you to ensure community aspirations are at the heart of the library's new strategic plan. I look forward to hearing from you.

Best, Cindy

Fesemyer Consulting LLC, Cindy Fesemyer, Principal
Madison, WI
Phone: 608-443-6362
Email: fesemyerconsulting@gmail.com

Fesemyer Consulting, LLC

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Qualifications

Helping information organizations see the big picture as they strive to help their community reach its aspirations is Cindy Fesemyer's passion as the Principal of Fesemyer Consulting, LLC.

Community engagement, qualitative assessment, strategic planning, engaged leadership, staff training, and keynoting are her areas of expertise.

Previously she was employed at the Wisconsin State Library as their first Adult and Community Services Consultant and served seven years as Director of the Columbus Public Library (WI), named a finalist for Library Journal's 2017 Best Small Library in America. She teaches academic and continuing education courses for the UW-Madison iSchool, sits on various committees of the Public Library Association, and is a Trustee for the Madison Public Library.

Librarianship is Cindy's second career. After 14 years managing non-profits, she earned her MLIS from UW-Madison in 2012. Se also holds a Masters in English Literature and a Masters in Teaching Writing from Humboldt State university (CA).

Farmington Public Library Staff Day, following a half-day workshop crafting objectives to accomplish new strategic goals

Fesemyer Consulting, LLC

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Experience

Cindy Fesemyer has worked with library strategic planning teams for three years. The most recent plans have been written for:

- Cheltenham (PA) - with Fast Forward Libraries LLC in 2022
  - Cindy collected the community data that informed the community needs assessment report.
  - Cindy provided new director coaching for the Library Director throughout her first 6 months in the position.
- SELCO Library System (MN) - with Library Strategies in 2022
  - Cindy conducted dozens of virtual focus groups and one-on-one interviews to inform the strategic plans of the SELCO member libraries.
- Santa Clara County Library District (CA) - with Constructive Disruption LLC in 2021
  - Cindy ran the qualitative data team to collect the community opinions that informed the community assessment report.
  - Cindy served as project manager for this extensive planning process.
- Reaching Across Illinois Library System - with Constructive Disruption LLC in 2021
  - Conducted numerous focus groups with members libraries; facilitated Executive Board and staff planning meetings; presented plan to Board and stakeholders
- Current strategic planning projects with Fast Forward Libraries include:
  - Athens Regional Library System (GA)
    - Cindy conducted the focus groups and interviews that informed the community assessment report; conducted multiple virtual staff retreats; conducted in-person Staff Day objective-setting activities.
  - Bloomfield Township Public Library (MI)
    - Cindy conducted the focus groups and interviews that informed the community assessment report; conducted staff SOAR sessions.
  - Farmington Public Library (MI)
    - Cindy conducted the focus groups and interviews that informed the community assessment report; conducted Board SOAR session; facilitated half-day staff planning workshop.

Fesemyer Consulting, LLC
Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Project Approach & Timeline

Overview

Your strategic planning process has three distinct phases:

- **Phase 1: Ask (February - May 2023)**
  - Collection and analysis of data including Census data, Library Board SOAR (strengths, opportunities, aspirations, results) session, library staff SOAR session, community survey, community focus groups, and stakeholder interviews resulting in a Community Assessment Report
- **Phase 2: Listen (May - June 2023)**
  - Via a Board retreat Library Board members process and discuss the data and opinions from the Community Assessment Report resulting in refreshed vision and mission statements and an outline for the refreshed strategic plan goals
  - Via a staff retreat, staff members process and discuss the data and opinions from the Community Assessment Report, as well as the refreshed Mission, Vision, and Goals statements from the Board, adding objectives under the top-level goals, resulting in an outline for the refreshed strategic plan
- **Phase 3: Act (July - August 2023)**
  - Goals and objectives are finalized resulting in the final 2023-2026 Strategic Plan.
  - Present plan to Board and stakeholders

Phase 1: Ask

Board & Staff Process Orientation & Input: It is key to generate excitement about the process with the Board and Staff and to involve them early in the process. To do this, we'll focus inward. Cindy will hold sessions with the Board and Staff to get them oriented to the strategic planning process and conduct a SOAR analysis (similar to a SWOT, but with an appreciative inquiry lens focusing on strengths, opportunities, aspirations, and results), and get input on what else we need to learn as part of the process.

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Project Approach

Phase 1: Ask (continued)

Research: I will collect and analyze 2020 and 2010 US Census data, looking for community trends that may affect the library's future directions.

Focus Groups & Interviews: To gather input from diverse residents and non-users, we will use a community aspirations approach. It is imperative to reach out to community stakeholders and groups working with underserved populations to ask for their assistance in organizing specific focus groups and encouraging participation in the process. These focus groups and interviews will give vital input into the process related to overarching community concerns that the library needs to consider during the planning process. Library staff will inform who we talk with based on the outcome of a community mapping exercise.

Gather Community Feedback & Conduct Research: At the same time as the focus group and interviews, we'll gather community and stakeholder feedback via a survey. The community survey is key to gaining a broad understanding of the library's current state, strengths, and potential future direction from community members that care about the future of the library.

The survey will be subcontracted to Amanda Standerfer, a skilled quantitative data analyst with Fast Forward Libraries,

Deliverables:

- Finalized planning process timeline with meeting dates.
- Community Assessment Report that includes analysis and findings from information gathered/reviewed, survey, focus groups, and interviews.
- Regular check-ins with Library Director.

Fesemyer Consulting, LLC
Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Project Approach

Phase 2: Listen

This phase starts with a meeting to review the Community Assessment report and planning for the Board and staff retreats.

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Board Retreat Session: The 3-4-hour Board retreat will focus on reviewing the Community Assessment Report and dreaming about the future. During the retreat, we'll get the Board up to speed on the planning process, review and discuss the Community Assessment Report, review and update the vision and mission statements, affirm strategic directions, and set plan goals. We'll use our time to critically think about what's most important for the library, including new services that will address priorities, services to discontinue, capacity building strategies, methods of outreach that might attract underserved populations, and funding implications.

Staff Retreat Session: During this phase, we'll hold a 3-4-hour staff retreat (or multiple, shorter retreats to maximize staff participation) to share the Community Needs Assessment report and dream about the coming 3 years. Staff will spend time brainstorming activities that will help achieve the plan goals that came out of the Board retreat session.

Strategic Plan Outline: Information collected during Board and staff retreats will inform the outline of the Strategic Plan document. The Library Director will review and edit the outline and may choose to share the draft with key staff and stakeholders for additional input.

Deliverables:

- Board and staff retreat sessions
- Strategic Plan outline
- Regular check-ins with Library Director

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Project Approach

Phase 3: Act

With an approved plan outline in hand, Cindy will draft and revise the various plan documents. With library marketing staff she will co-create a drafts of the graphical and written versions of the plan that correspond with library marketing standards. The Library Director will review and edit the drafts and may choose to share the drafts with key staff and stakeholders for feedback.

Draft plan documents are then presented to the Board for final comments. This session allows the Board to clarify next steps and discuss an implementation and communication strategy for the plan.

After the Board session, Cindy will make revisions and present final plan documents for approval.

Deliverables:

- Strategic Plan
- Presentation to Library Board

Fesemyer Consulting, LLC

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

Project Costs and Deliverables

Total Budget: $9,000

Phase 1 (February - May): $5,000

- Board & staff orientation sessions: $500
- Research: $500
- Community survey: $1,000
- Focus groups & interviews: $2,000
- Write Community Assessment Report: $1,000

Phase 2 (May - June): $2,500

- Board and staff retreats: $2,000
- Draft plan outline: $500

Phase 3 (July - August): $1,500

- Write final plan and one-page graphical plan: $1,000
- Present to Board: $500

A Note on COVID-19

Planning always comes with unique challenges and opportunities for the organizations involved. Current events dictate further complications with renewed efforts to fight COVID-19 and its variants. As such, this plan relies on gathering community, Board, staff, and stakeholder aspirations, wants, and needs using a hybrid of virtual engagement tools and, should conditions allow, in-person methods.

With extensive experience in virtual community engagement and collection of qualitative data, Cindy Fesemyer can confidently deliver virtual engagement and planning activities when necessary. In her experience, there is no substitute for in-person conversations and engagement. However, virtual options remove some barriers and allow for collection of ideas and opinions from a more diverse pool of community members and stakeholders. When it is safe for communities and stakeholders to gather in person, she will be there to lead activities. Ideally, a hybrid virtual/in-person approach will be adopted regardless of the effects of COVID-19.

Cindy Fesemyer
608.443.6362
FesemyerConsulting@gmail.com

References

Ms. Monica Harris
Interim Executive Director
Reaching Across Illinois Library system (RAILS)
Burr Ridge, IL
630-734-5129
monica.harris@railslibraries.info

Ms. Mary Kay Moran
Executive Director
Cheltenham Township Library System
Cheltenham, PA
215-885-0457
mmoran@mclinc.org

Ms. Jennifer Weeks
County Librarian
Santa Clara County Library District
Campbell, CA
408-293-2326 x 3001
jweeks@sccl.org