



**HARWOOD**

The Institute for Public Innovation

# Our Approach to Strategic Planning

September 2018

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# Today's Webinar

1. What it means to be a library that is Turned Outward
2. Steps for Strategic Planning
3. Tools for Turned Outward Strategic Planning



# First ... Updates!

- Resources at [www.theharwoodinstitute.org/libraries](http://www.theharwoodinstitute.org/libraries)
- One more webinar scheduled this year – Nov. 7
- Get trained at the Lab for Libraries, Oct. 9-11 in St. Louis -  
<https://theharwoodinstitute.org/public-innovators-labs>
- For more info contact Colleen Bowman at [cbowman@theharwoodinstitute.org](mailto:cbowman@theharwoodinstitute.org) or 301-656-3669
- Review June 2018 webinar – Creating More Effective Library Programs



# My Organization vs. The Community



# A Turned Outward Library

- Uses the community as the reference point for choices and actions
- Creates programs and strategies that are rooted in the public knowledge of a community
- Is an essential, not just a “nice to have” part of community



## Strategic Planning – The Steps

1. Gathering Input/Reviewing Data
2. Setting Direction and Goals
3. Identifying Strategies
4. Developing Targets and Metrics



# Gathering Input/Reviewing Data

## Apply Public Knowledge



# Slide 7 Notation

## Step 1: Gathering Input/Reviewing Data

Often at this step strategic planning uses expert knowledge to look closely at data and metrics that show what is happening with library services and in the community. They may also include focus group and/or interview strategies to gather input from constituents and library users. These are all useful ways to look at the library.

From a Turning Outward perspective this is the perfect time to layer in public knowledge to the discussion and to talk about the community context as part of the library's situation. All of the public knowledge gathering tools can be used:

- **Community Conversations** – Do 3-5 discussions with residents in key areas to connect with their aspirations and the reality of their lives.
- **Ask Tool** – Use this to do one-on-one or small discussions in the community.
- **Aspirations Exercise** – This tool is ideal for holding discussions with groups at existing meetings. Local rotary club, church groups, book clubs and other gatherings can often give 45 minutes to this discussion.
- **Summarizing** – Be sure to use the tools for summarizing to organize your learning into themes.
- **Sharing Public Knowledge** – Create time in your strategic planning agenda to share your themes using tools for sharing public knowledge.



# Setting Direction and Goals

## The 3A's & The Sweet Spot



# Slide 9 Notation

## Step 2: Setting Direction and Goals

When working on clarifying organizational direction and setting goals for the library, the Turned Outward mindset can help you look for opportunities to deepen impact and become more relevant to the community.

Think about:

- The 3A's. How are you currently doing at reflecting them in the work of the library? How can you increase and strengthen these dimensions?
- The Sweet Spot. What work needs to get done that advances concerns, strengthens community and fits with the library's assets?

*In Spokane, Washington the library wanted to help the community by cleaning up a neighboring park. Instead of just paying to clean it up they worked with community partners and volunteers and made an event out of it. They created a space to help people connect to each other and the library.*



# Identifying Strategies

## Community Rhythms



# Slide 11 Notation

## Step 3: Identifying Strategies

1. Start your effort to set strategies by revisiting Community Rhythms.

- Given what you learned in gathering public knowledge, what stage do you sense the community is in?
- When you think about the stage you are in, what strategies make sense for that stage? (Use the Do's and Don'ts Chart for tips)
- Now look at the strategies that are emerging in the planning – How well do they fit with your Stage? How might you adjust them to take into account the insights you have about your community?

2. Next review your Public Knowledge summary and look at the Authority, Authenticity, and Accountability tools again.

- Ask yourself if the new strategies reflect public knowledge?

3. Revise and your strategies.



# Developing Targets & Metrics

## 3A's & Making Meaning of Data

Download and use the Harwood Institute created ALA tool on Making Meaning of Data. This exercise is designed for libraries and can help you look at the metrics you already collect and connect them to public capital and Turned Outward efforts. This tool and others can be found at [www.ala.org/ltc](http://www.ala.org/ltc).



# Slide 13 Notation

## Step 4: Developing Targets and Metrics

In the final parts of strategic planning organizations often identify key targets and build dashboards to collect metrics and track progress. As you do this use two tools to help you include Turned Outward targets and metrics.

- Use the 3A's tools and discussions. This will help you stay grounded and choose useful metrics aligned to community perspective.
- Download and use the Harwood Institute created ALA tool on Making Meaning of Data. This exercise is designed for libraries and can help you look at the metrics you already collect and connect them to public capital and Turned Outward efforts. This tool and others can be found at [www.ala.org/ltc](http://www.ala.org/ltc).



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***Thank You!***