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# Library Strategic Planning: Impacting Change on a Local Level

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# **Library Strategic Planning: Impacting Change on the Local Level**

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Honors 490

## Introduction

In an ever increasingly digital world, public libraries must adapt to their surrounding community. I wanted to explore how libraries are making this change as a part of my honors senior thesis at Western Washington University in Bellingham, Washington. I interned with the Bellingham Public Library (BPL) and assisted with their strategic planning process from October 2018 to March 2019. My role as strategic planning intern consisted of researching the strategic plans of other public libraries around the nation, compiling library metric data, and creating graphs and infographics for the library director and board of trustees to use. Post graduation, I will continue working with BPL, but as a note taker to gather public knowledge for the strategic planning process.

My goal in this process was to become more familiar with more behind-the-scenes aspects of public library work, such as data collection, administrative processes, and strategic planning. I will graduate with a bachelor's degree in Geology, and then pursue a master's degree in Library Studies and Information Science in order to build a career in public libraries. I've worked within public libraries in a volunteering capacity ever since I was thirteen years old, and I am very grateful for the internship experiences in my college career that have allowed me to continue to work with public libraries in an academic capacity.

This paper will outline BPL's strategic planning process. The first section involves the theory and models of strategic planning that BPL used to approach structuring their process. We at BPL drew from the Libraries Transforming Communities (LTC) and Turning Outwards model developed by the American Library Association (ALA) and the Harwood Institute. This model relies heavily on public knowledge gathered through community ask exercises called Community Conversations. Next, we looked at libraries who have successfully implemented LTC methods into their library planning or operations, and then examined the plans of many

comparable libraries around Washington state and the broader nation. As strategic planning intern, my role was primarily to support setting up the strategic planning process, researching the methods of other public libraries, and to gather data regarding library metrics and public knowledge.

## **Libraries Transforming Communities**

Libraries Transforming Communities is an initiative developed by the American Library Association in 2014. LTC was created with support and research from the Harwood Institute to respond to a growing need for public libraries to respond to 21st century needs and problems. In an increasingly digital world, libraries fight to maintain their spot in the public consciousness as a provider of free information, meeting space, and resources. Many think pieces on the topic are available online; news sources such as the *New York Times*, *CNN* and the *Washington Post* ask if libraries are still relevant in a world where Google can supply answers and Starbucks provides WiFi for the price of a coffee. There is a need for libraries to evolve into institutions that can adapt and evolve into the new digital era.

In response to this need, the ALA partnered with the Harwood Institute to develop new models and skills for libraries to talk with their communities. In 2014, ten public libraries across the USA took part in the LTC pilot program. This program involved training librarian teams from each library in partnership with the Harwood Institute and the Bill and Melinda Gates Foundation. With the training, each library specific community needs and became an agent of positive change within the community, whether that be a city beautification initiative, or arranging potlucks and get-togethers to increase community connectivity. Through the tools developed by LTC, libraries are able to align their services with community needs, and take an active role in the community.

## Turning Outwards

From 2016-2018, LTC developed a model called Turning Outward for wider implementation within public libraries. Webinars and online resources on Turning Outward are free to access from the ALA's website. These resources include guidelines and outlines for key elements of the Turning Outward approach, such as community conversations and ask exercises. It is through these resources that the Bellingham Public Library (BPL) adopted LTC's mission and methods for reaching out to the community and establishing the library as a community cornerstone.

Turning Outward is a key element to LTC. It was developed by the Harwood Institute, a think tank focused on how to equip groups with tools and knowledge to increase community connectivity, solve problems, and affect change. A core value of Turning Outward is prioritizing organizational goals in the context of the needs of the broader community. This means less focus on inward-facing decisions that emphasize internal goals, such as what is best for the library. Turning Outward asks organizations to look for goals from the outside, asking "what does the community need from the library?" It requires looking at the needs of the broader community. The library would then act as a staging platform for addressing those needs. This model prioritizes engagement with the community to make relevant and sustainable change within the broader community, and allows libraries to remain relevant to the community.

To understand how organizations inform themselves of community needs, the organization must gather public knowledge. Public knowledge is not data. Census records and demographic data only partly describe a whole community. Public knowledge is different from expert knowledge. A library that only asks questions about library experiences or metrics will only have a limited understanding of its role in the broader community. The Turning Outward

approach involves speaking with community members and organizations outside of the library to get a broad picture of where there is a need. This reveals information that experts or data might not ascertain.

For example, the Columbus, Wisconsin library engaged with different groups in their small town, and found that the community desired a more connected and beautiful city. As a result, the Columbus team organized cleanups of the local Amtrak station, and commissioned artistic public benches. The library partnered with different community groups to help make the community aspirations a reality. As such, there is a movement within the broader city to tackle more community issues through partnership and collaboration, called Root for Columbus.

In Spokane, Washington, similar aspirations were mentioned, namely a need for individual connection with the broader community, and a need for a safer community. While the library wasn't able to tackle such a huge issue, the Spokane LTC group was able to identify actionable projects to contribute to the broad aspirations and inspire community members themselves to take action. One project was a park clean up, partnered with an individual Eagle Scout. Another project involved going to local high schools to help students with their resume building. While not every project worked, and often the LTC groups were met with skepticism, slowly the library and the community began to have real success and bring needed changes to the community. It has galvanized library staff to take a bigger role in the outside community, whether that be to serve in the chamber of commerce, or to represent the library by participating in outside initiatives. In these ways the community informed the library of the needed changes. In addition to this, library staff, by volunteering with other institutions and agencies, further demonstrated the centrality of the library in making the community one in which people wished to live.

## Community Conversations

The most important key to LTC being successful is public knowledge. Often the only way to access public knowledge is to go straight to the source: the community. The LTC model offers a tool to reach out to the community in a productive way called Community Conversations. Community Conversations are informal meetings held to ask community members what their aspirations for the community are. “What kind of community do you want? What are the most important issues facing the community, and why? What would help resolve these issues?” In a kitchen table style forum, the Community Conversations invite everyone to speak, in a judgement-free space.

Two people are needed to run a Community Conversation: the facilitator and the note-taker. The facilitator sets the expectations for the meeting, asks questions and follow-up questions, and makes sure that the conversation stays on track and that everyone gets a chance to speak. The note-taker records what aspirations were being expressed, important quotes, and the emotions of the meeting. It is not a verbatim transcript, but rather identifying the key elements of what was said, unsaid, and what community members felt they needed. The role of Community Conversations allow organizations to engage and develop informed strategies to affect real change within their community. This form is perfect for libraries, since they offer a neutral meeting spot for the community to gather.

So why does LTC matter? What do libraries stand to gain from adopting this model? It allows libraries to focus on what makes them great: their community. Libraries are often funded from the local level. In an era of strict budget cuts and austerity measures, it is easy to overlook the value of a public library within a community. LTC gives libraries and librarians the tools to actively be a part of the community beyond lending materials and meeting spaces. Libraries

now have the ability to affect real change that positively impacts the community around them, making their community stronger, more beautiful and more resilient.

## **Bellingham Public Library**

The Bellingham Public Library in Bellingham, WA, is transitioning to a new strategic plan for the 2019-2023 time period. The library director, Rebecca Judd, and the library board want to implement the LTC model when designing the library direction and goals for the future. BPL is looking to the community to inform and guide library priorities and initiatives with the aim to further cement the library as a valuable community resource and gathering place. Over the course of 2019, the library will gather data, hold community conversations, and draft the strategic plan for the library and city to approve.

As a department of the City of Bellingham, the library seeks to align with the council approved city legacies and strategic commitments (Fig. 1.). These commitments are to a Vibrant Sustainable Economy, Sense of Place, Safe and Prepared Community, Mobility and Connectivity Options, Access to Quality of Life Amenities, Quality and Responsive City Services, Equity and Social Justice, Healthy Environment, and Clean Drinking Water. BPL's strategic plan aims to address most, if not all, of these commitments. Through community conversations, the library aims to understand how Bellingham residents prioritize the city's goals in their own lives, and if there is a need that BPL could fulfil that also fulfils the goals of the city.

BPL is prioritizing the community conversation aspect of the data gathering portion of the planning process. The goal is to hold a series of conversations across the city, and assess community member's aspirations and concerns for the broader community. The ten case study libraries that implemented LTC serve as models for BPL's strategic plan, along with many other libraries that have used the Harwood Institute tools and the LTC approach. Other libraries that



are comparable to BPL in size, style, and library structure were also studied to get a sense of what BPL’s peer institutions are doing.

When reviewing strategic plans, several themes arose: engaging spaces, increased programming for all ages, and community driven policies and engagement. The BPL planning group preferred plans that were highly visual, emphasizing graphics and readability. The emphasis on the strategic plan as a marketing document is one that BPL wants to incorporate into its own strategic plan. The documents were not too long or dense with text; the strategic



**Fig. 1. Bellingham City Council Legacies and Strategic Commitments, adopted from the City of Bellingham Website at. <https://www.cob.org/documents/council/legacies-commitments.pdf>.**

plan identifies the mission, values, and goals without going too in depth on all of the details.

Some libraries had additional documents for annual action plans, or had a very specific timeline built into their strategic plan, but BPL will not use this approach. Instead, the library will tailor the

annual agenda according to identified strategic directions. This allows a level of flexibility when creating programs and initiatives that can accommodate for fluctuations in library budget, timelines, or other factors. What was taken away from studying all of these plans is a sense of a strategic plan as a guiding document for the library to structure its decisions and programs.

The goal of BPL's director and board of trustees is to have a document to guide the library direction into the immediate future. The goal is to produce a broad vision of what the library should look like in the future and create short-term action plans to tailor to that vision each year. Having the strategic plan be a broader statement offers a framework approach to address library and community concerns and aspirations. This also identifies areas in which the library can expand or improve services.

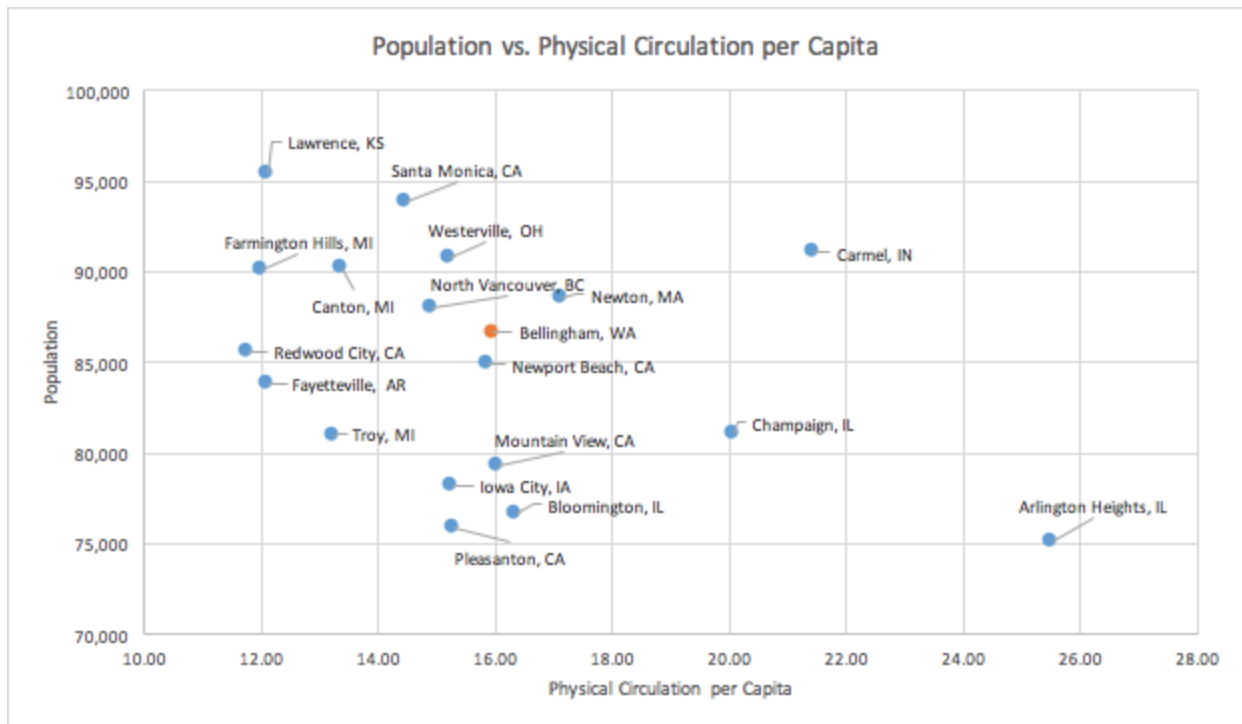
## **Strategic Planning Internship**

My role in BPL's strategic planning process was primarily to gather research and act as a support for the library director and board. A lot of the preliminary research conducted in October-December 2018 involved looking at other libraries and analyzing strategic plans. We identified what we wanted to bring into BPL's plan, or areas in design and subject matter that we felt could be improved upon. From there my role evolved into that of a note-taker for the community conversations.

All in all, I looked at the strategic plans of approximately thirty comparable libraries. This was to get a sense of what the content of these plans are, and what looks good on the page. Some of these libraries were ones that specifically used LTC in their strategic planning process, and were treated as potential guidelines for BPL's process. Others were libraries around Washington State, to see how libraries within our region went about their plan. I also analyzed

the plans of each Library of the Year and Small Library of the Year from the past five years. Some libraries I looked at required a bit more digging to find.

I found more comparable libraries using the PLAmetrics database. PLAmetrics is a national survey of library data regarding library collections, services, and staff. The results are



**Fig. 2. A comparison of twenty libraries around the country similar to Bellingham Public Library in service population and physical circulation (i.e. books, movies, CDs) per capita. BPL plots at about the average in both categories, with the Newport Beach Public Library in California being the most similar to BPL.**

then compiled into a database, and library administrators can generate reports that compare all of the libraries that took the survey. I found 18 libraries that were similar to BPL in service population, circulation per capita, borrowers per capita, and structure (i.e. has a central/main branch). Using PLAmetrics allowed us to see what libraries are comparable to BPL, and what they were doing with their strategic plans, and how BPL compares to similar-sized libraries (Fig. 2).

## A typical day at the Bellingham Public Library

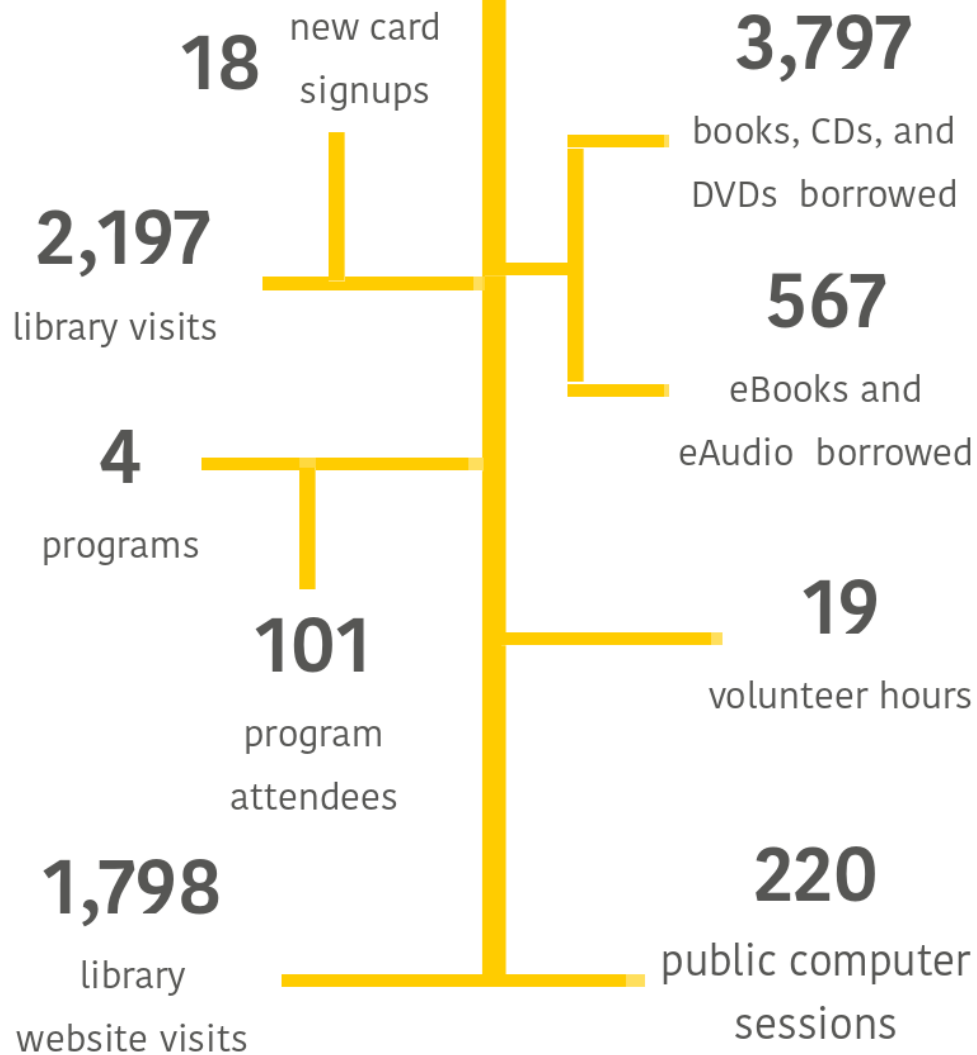


Fig. 3. An infographic displaying what a typical day at BPL is like. The numbers were gathered by averaging the annual totals of each variable for the past four years, and then averaging that number by 365 days. From that, we can get a sense of how BPL is being utilized over the course of a day between the three branches.

I also compiled data from the PLAmetrics database to create an infographic entitled “A Typical Day at the Bellingham Public Library” (Fig. 3). This infographic was inspired by a similar spread in the North Vancouver Public Library (NVPL) strategic plan. The “Typical Day” spread in NVPL’s plan was an interesting way to display library metrics in a simple and easy manner; it worked well as an introduction to what the library is, and what it does within the community. I took the average over the past four years of different library metrics, such as number of visitors, library card registration, programs and program attendance, items borrowed, website visits, and volunteer hours. The average is then divided by 365 to get a sense of what an “average day” at the main branch of BPL would look like. This information is useful as a gauge of library metrics and can answer questions on library use over the past few years. It leads to the next questions of where—and how—the library can improve.

The second phase of my project allows me to have a more hands-on approach with data gathering. Throughout February-April 2019, BPL will be conducting Community Conversations. I will participate in these conversations post-graduation, continuing my strategic planning internship as notetaker. I look forward to applying the knowledge that I have learned throughout my thesis project to a more hands-on role.

## **Conclusion**

This project has been eye opening in many ways, and has informed a lot of my knowledge about public libraries on a more administrative level. There is a lot of thought and resources put into strategic planning and creating a living, functional document that can be used as a resource. It amazes me as a future librarian, but also as a patron of libraries, to see how deliberate public libraries are in envisioning and crafting a future for their community. I also learned a few practical things throughout this process.

Large scale projects like a strategic plan have a lot of elements that I had no idea I was getting in to. The reality of this thesis project, and the broader strategic planning process is that it takes a lot of time, research, and collaboration between lots of people to make it to the finish line. I am very grateful for all of the guidance that BPL's director, Rebecca Judd, has given me throughout this process. Through her, I was able to glimpse at how library administration conceptualizes and executes projects, and the resources that they have available for those projects, such as PLAmetrics.

I am very excited to take these new insights and experiences ahead towards my budding career in libraries. I hope to participate in similar projects during my time in graduate school. I've found that I like to be a part of projects that benefit and impact my broader community, and I want to continue to do so. Post-graduation, I am looking forward to spending time as a notetaker in the Community Conversations and continuing to aid with BPL's strategic plan initiatives.

## **Acknowledgements**

This project would not have been possible without the help and support of quite a few wonderful individuals. Rebecca Judd and the entirety of BPL's staff have been so helpful and supportive of my inclusion to their team. I'm so grateful for the opportunities that I've been given to learn. Dr. Vernon Johnson of WWU's political science faculty and BPL board member has been instrumental into making this thesis into a comprehensible paper. And finally, a huge thank you to Dr. Scott Linneman and the WWU Honors Program who always knows how to point me in the right direction.

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