Here are the answers to questions in chat that we were unable to address during the [webinar](https://www.webjunction.org/events/webjunction/strategic-planning-in-a-deeply-weird-world.html).

* **Any thoughts on adapting these planning ideas for smaller libraries with 5 total staff members?**

I think the basic structure scales to any size. For example:
	+ **Start with shared Values**: Develop a shared values/culture statement.
	+ **Develop Outcome Areas Based on Community Aspirations and Needs**: Speak with patrons and community members about their aspirations, needs, challenges. Develop a set of strategic areas (i.e. literacy, health, civics) where your library is well-positioned to have a positive impact. Invite your staff to brainstorm ideas and experiment with new approaches to achieve outcomes.
	+ **Elevate Experiences**: Invite staff to have short conversations with patrons about what adds to their positive experiences at the Library, and what the Library could do to create better experiences. Invite staff to walk through the library as if they were a patron with a specific goal (i.e. checking out a book, studying), and then record and share what that experience was like.
* **So is the plan that this type of planning happens on a rolling basis, annual basis or ??**

Yes, the plan is that we continue to have conversations (both short-form and long-form) with patrons, and continue to convene conversations with community leaders and partners, as well as looking more continually at demographics to create a more continual feedback loop that informs our decisions and resource allocations. Simultaneously, we will continue to deepen our knowledge and practice of service design tools and methods (Research, Ideate, Prototype, Evaluate, or put another way: Empathize, brainstorm, experiment, Learn, Iterate.)
* **I need more info on that Holds to Go!**

Holds-to-go is an experiment that is being developed to provide express holds pickup, delivered to your car. One of our branches has very limited parking, and a difficult entrance experience. We are going to experiment with having a reserved parking spot for holds pickup, and a staff member will deliver the holds right to the car. The hypothesis is that this will provide an exceptional experience for patrons and help alleviate parking issues. Stay tuned!
* **What kinds of new programs [were created as a result of customer intercepts]?**

Staff created a new "[Fix-It Clinic](https://events.slcpl.org/event/1678898)" program, in partnership with Utah Recycling Alliance, that just launched and was extremely well attended. One of our librarians is working with another partner, "Salty City", to offer writing workshops to begin in February. The theme is love stories. Each session will feature a writing prompt, workshop time, discussion and feedback. The series will be held on the third Saturday of each month and run through April. These ideas came from customers' answers to the question, "What would be your dream program, activity or service that you'd like offered at the Branch?"
* **What were primary theoretical underpinnings - any key texts, articles, etc. that we might read as we prepare to do this?**

There was no single text that served as a theoretical underpinning. Rather, it was an insight that we needed to question the purpose and value of traditional strategic planning (i.e. to ensure organizational impact in the community; delivery on our mission) , and question whether a traditional plan made sense or whether another approach was more appropriate in a rapidly changing world. Our hypothesis is that in a rapidly changing world, building internal organizational and staff capacity to assess, experiment, and adapt would correlate highly with success.

* **Tips for solo librarian embarking on this for a school library?**

Start with the core values that exist for your school- this might include a vision or mission statement, and if you feel there is additional need, work to develop some core values for the library itself- what is your reason for being in existence?

Next, start to ask questions, and to interview your stakeholders. This will most likely include faculty members as well as the students themselves, and possibly even members of the PTA. Through this process, you will be able to see what the needs of the people whom you are serving are, and this will allow you to start determining some outcomes that you could help to create. Once you know the desired outcomes, you can use them to help form your strategic goals.

Finally, evaluate the experiences you are providing for those whom you serve, in every aspect of the library- collections, shelving, programs, atmosphere, etc. Are there things you can do to maximize experiences?

* **What were the two questions you asked when customers were exiting the library?**

We asked, "what was positive about your library experience today?" "What would have made it better?"
* **How long did the prep work take before it went to rollout?**We did six months of work speaking with the community and patrons, learning service design methods before spending another month or two designing and printing the "Field Guide" and rolling that to staff -- with lots of communication to staff in between (staff day presentation; internal blog posts; reports at staff meetings, etc.)
* **A bibliography of the resources you used would be helpful

Book Recommendations**
* [Orchestrating Experiences: Collaborative Design for Complexity](http://www.worldcat.org/oclc/1035807445) by Patrick Quattlebaum
* [This is Service Design Thinking: Basics, Tools, Cases](http://www.worldcat.org/oclc/1076480143) by Marc Stickdorn
* [This Is Service Design Doing: Applying Service Design Thinking in the Real World](http://www.worldcat.org/oclc/1027188158) by Marc Stickdorn, Markus Edgar Hormess, Adam Lawrence, Jakob Schneider
* **Is your library system unionized?**

No, we are not unionized
* **How do you measure outcomes?**

One of the unique aspects of our approach is that we **intentionally** did not define measurable goals or outcomes as part of the Roadmap process. The Roadmap process was intended to create a flexible framework that defined outcome areas. Within that framework we are now creating specific goals and projects within the context of specific outcome areas. We are creating "Location Plans" for each Branch that are grounded in local neighborhood demographics. These plans will take into account staffing capacity and local needs to align programs and collections to local needs within the context of our six strategic areas of focus. For example, one of our branches may focus much more on early literacy programs and outcomes, while another is focusing much more on civic engagement programs and outcomes.

As an organization, we do not have a robust history or practice with outcome-based planning and assessment. We recently had the entire management team complete two day of the [RIPL Institute](https://ripl.lrs.org/), to help us improve our skills and practice in this area. We have also recently created a data coordinator position to help us develop a better practice of measurement and assessment.
* **How was the board involved?**

We had one member of the Board participate at a deep level as part of our 30 member "Navigator Team" over six months. Board members were invited to participate in a number of community conversations, and they were kept in the loop at Board meetings and with interim reporting.

* **Who was the consulting company?**We had the pleasure of working with Margaret Sullivan of Owner/Principal of Margaret SullivanStudios and Patrick Quattlebaum.
* **Not all libraries cultures are at this place of being open to such fundamental change. How can this change?**

Culture change, and creating a culture that is open to change is large and complex topic. While there are many books, articles, etc. that try to address this issue, I highly recommend these two resources:
	+ - [Clear Leadership](http://www.worldcat.org/oclc/768088012) by Gervase Bushe. See also this article: [Changing Organizational Culture Through Clear Leadership](http://www.klartledarskap.se/download/18.8add65e142b3b9638116bc/1386241489454/Changing%2BOrganizational%2BCulture%2BThrough%2BClear%2BLeadership.pdf)
		- [Co-Creating Culture: Step Up to Accountability](https://www.youtube.com/watch?v=_nKL1IzQdJU) (Merrick Rosenberg TedX Talk)
* **Was the Board 100% on board?**

Yes, I told the Board literally from day one that I wanted to take a different approach and NOT do a strategic plan. I explained the rationale, the vision, etc. No objections.