Aloha Public Library Strategic Plan

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Executive Summary

In this new strategic plan for the Aloha Library, two strategic goals were created based on the most important needs of this community. The first involves supporting a wide variety of adult literacy services including ELL (English Language Learner) class offerings, which include a focus on improving the technological and information literacy skills of the local community. The second involves becoming not only a place for finding information, but transforming the library into a thriving community center which highlights the rich local history of the West Hills community.

These goals were carefully selected to address several problems observed within the surrounding community. The current library has been hampered by low usage while still struggling to meet the information needs of the local community. Recent demographic information shows that twenty-five percent of the local population is recent immigrants who bring with them their own unique and pressing information needs. In addition, the area has lacked a much needed community space where people can meet to discuss issues and participate in special programs. There has also been a call from within the community to provide a safe, comfortable space where people can gather and have their needs met.

Several initiatives will be undertaken to meet these needs. Additional technological resources will be provided in order to decrease the waiting time for computers and improve the functionality of the library website. Classes in English Language instruction will be provided through new technologies, as well as classes to help patrons learn technology skills for school and work applications. Monthly community events will be planned throughout the year in cooperation with local community leaders, in addition to other service offerings for the community. Local business and leadership partnerships will be utilized to organize these service offerings.

By delivering these and other unique services to our patrons we can create a library that will become an important centerpiece to the community. It will be a space which brings people together and connects them not only with the information they need for school and work, but with the vital services they depend on in order to thrive in their community.

Organizational Profile

Overview

The Aloha Library is recently relocated in the Aloha, Oregon area, in the West Hills neighborhood. West Hills has long been a depressed area, with high crime rates and poverty. Aloha Library used to be located in another part of town, in the East Hills area, for about 10 years. Over that time that area became mostly industrial. With few close residents and minimal parking, awareness and usage were very low. This new location was chosen for the library to help revitalize the West Hills area and provide needed services to the community.

An interesting and unique feature about Aloha Library is that it is the ground floor of a 10-story apartment building. The apartments are newly restored, affordable one, two and three bedroom units. A new two-year strategic plan is needed now that the library has relocated and is part of this residential building. With "built in" patrons living above, the library hopes to create a sense of community with the residents. Demographics have also changed in the area over the years and the library needs to address the growing immigrant population by providing customized and inclusive services.

Population: The Aloha, OR metropolitan area has a population of 1 million people. The community surrounding West Hills has a population of 40,000.

Ethnicity: About 25% of residents are newly immigrated to the country from Somalia, Mexico, Vietnam, China and Russia. Many have refugee status.

Income: The overall population is middle to lower income.

Education: 25% of the population have college degrees.

The Organization

Aloha Library is a midsized library with a staff of 20 (15 full time, 5 part time) and a team of community volunteers. The library is a branch under the Harper County Library System which oversees 12 neighborhood libraries and a main branch. Currently Aloha Library provides books, magazines, newspapers, journals, DVDs, and audio books and has 10 computers for patrons to use for up to an hour per day. The library's website provides a simple online catalog to lookup and reserve materials. Circulation numbers have dwindled over the past 10 years to about 200 items a day being checked out or used on-site.

Guiding Values

- Enrich the community
- Provide a safe area for residents and their children
- Be inclusive in our service
- Connect patrons with information
- Reduce crime
- Reduce poverty
- Engage community in positive ways

The stakeholders are the Mayor, the city and county library board which includes four elected neighborhood residents and two private donors. Their values are in line with the strategic plan.

Our Mission: To enrich and empower the community.

Our Vision: Improving literacy at the heart of our community by connecting patrons with technological opportunities, social services, and a gathering place for teaching and learning.

Preparation and Planning

The Library Management Team

The library management team is responsible for all stages of the strategic planning process. The team consists of the following senior staff:


Beth Caldwell – Library Director responsible for heading planning sessions, setting plan deadlines and the distribution of work among the senior staff. The Director shepherds the process from ideas to this final document, helping to make the team's efforts efficient and effective.

Katy Bogart – Youth Services Manager. Youth Services Manager will manage all children's and young adult programs, including ESL and early literacy programs. During the planning process, the Youth Services Manager recorded all decisions and discussions of the team.

Visakha Seon – Outreach Coordinator. The Outreach Coordinator is responsible for planning and maintaining relationships with outside stakeholders such as community leaders, cultural centers, neighborhood associations and social service programs.
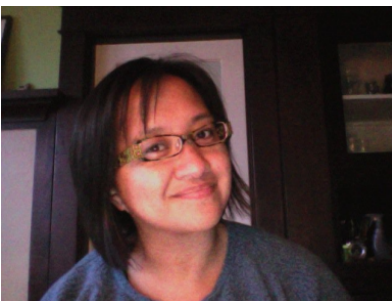
Maria Power – Volunteer Coordinator. Volunteers are central to the success of the library and its programs. The Volunteer Coordinator will work with all volunteers to meet the needs of the library patrons. The volunteer coordinator is also responsible for coordinating the English as a Second Language program at the library.

Thea Evenstad –Head Reference Librarian. As part of the strategic planning process, the Head Reference Librarian will consider the specific reference needs of our patrons for both print and electronic resources. The Head of Reference will also conduct training for those staffing the reference desk and work with experts (medical, law, etc) in order to best serve the community.

Jessie Sweeney – IT Director. The IT Director is involved in almost every aspect of the planning process. The IT director will assess the technology needs of the space, from internet ready computers, mobile devices and applications, the library website, as well as work with the facilities management team to ensure adequate bandwidth and electrical support.

Planning Factors

We took into consideration several factors while creating a strategic plan for the Aloha Library:

Challenges:

- Staff has limited time for new projects. Like many public libraries, we have a limited number of staff and we want to make sure they can achieve reasonable goals in the course of their daily work.
- Money and resources are always a consideration when starting a new library branch, and for its continued maintenance.
- As this a new library, it will be important to form a relationship with the community it is serving. This particular neighborhood has a history of a higher crime rate. We want the community members to support and embrace the library as a safe, welcoming community resource.
- Given that the library shares a building with many residences, we want to ensure that the library's goals, endeavors and events do not negatively impact the residents, and vice versa.

Strengths:

- This is a newly refurbished, large space that can be used for gathering, planning, with access to computers and a kitchen area.
- We already have a committed, experienced, innovate staff, as well as community engagement from key civic leaders.
- With the residential units attached to the building creating easy access, the library has built-in clientele. These residents are also valuable in the planning process in regards to needs assessment.

Current Reality

Environmental Scan

The following are major factors affecting the library and dictating a need for immediate and strategic planning:

- Relocation / New Building

Aloha Library's move to the West Hills neighborhood of Aloha, OR calls for a reassessment of the library's offerings and future direction. This move represents a dramatic shift in the library's surroundings, patrons, and opportunities. Furthermore, we must find the best ways to make use of our new space, and to capitalize on its built-in strengths.

- New Demographics:

Serving the West Hills community means that we are serving an entirely new target population. In particular, West Hills is unique from our previous target population in East Hills because of a significant immigrant presence. English Language Learners represent 25% of the population.

- Community Needs:

Furthermore, West Hills is heavily impacted by high poverty rates. In turn this has meant a great deal of crime. Because of the high incidence of crime, and because the neighborhood is home to multiple distinct and often self-contained ethnicities and cultures, West Hills currently lacks any sense of cohesion as a community. We hope to position the library to serve as a community center, to provide a safe space to celebrate the diversity and rich history of each culture represented by the inhabits of West Hills.

- Digital Divide:

Not only traditional literacy in English but also information literacy is a necessary skill that can present roadblocks to success in education and employment. Given the substantial poverty in West Hills, one of the most important roles the Aloha Library can fill will be to lower barriers to accessing technology, both in terms of providing sufficient computer workstations and opportunities to improve informational literacy and general computer skills.

While we are poised to truly take off as a civic institution and have a significant impact on the West Hills community, we are also at an extremely vulnerable point. Circulation numbers have dropped, and libraries everywhere are faced with the challenge of keeping up with the move from physical material collections to digital services. Thanks to our recent move, Aloha Library is not yet established as a resource for and member of the West Hills community. The ramifications of not moving into the future carefully and strategically could include failure to ever gain the support of the community, leading to irrelevancy and eventual obsolescence.

SWOT Analysis

	Positive	Negative
Internal	• Experienced, passionate staff • Dedicated outreach position • New facility - had input in its design	• Limited resources, especially time and money • No staff members currently live within our target community
External	• Residents sharing building are built-in clientele to whom we have direct access (e.g. for outreach, marketing) • Civic leaders and organizations active in the area are open to engaging with the library to provide feedback and guidance	• No precedence/established successful model to follow in terms of positioning library as community center • We are not yet established within the community – we must build trust and prove ourselves as a useful resource

Organizational Performance

Current activities and services:

- ELL Services

  We currently offer a small number of regular ELL classes. No other ongoing
  services are provided for English Language Learners.

- Digital/informational Literacy Services

  Access to Technology

  Currently we are able to offer our patrons use of 20 workstations with access to the
  Internet, word processing and printing. Six of these are permanently housed in the teen
  section and are reserved solely for teen use; two are housed in the children's section and
  offer children access to a limited number of sites (such as PBS games). This leaves 12
  workstations for adult patron use, and wait times for access are quite high.

- Outreach / Marketing

  The library does currently hold several social media accounts – Facebook and
  Twitter – but they are used rarely and have few followers, meaning these are
  not efficient ways to get information out to patrons.

Key metrics to measure actual and desired performance

Activity	Performance Measure	Current Performance
ELL Services	Hours offered; hours of patron participation (# patron participants x # hours participated)	5 hours ELL instruction per week; average of 22 hours of patron participation per week (average 11 participants x 2 hours participation)
Digital and Information Literacy Services	Workstations available per population; wait-time for Internet workstations	1 workstation per approx. 3300 patrons in West Hills neighborhood alone; average 30 minute wait-time
Outreach and Marketing	# of followers/target population (%); # of posts/Tweets per week	670 followers/40,000 target population (1.67%); fewer than 1 post or Tweet per week

Gap Analysis

Activity	Performance Measure	Current Performance
ELL Services	5 hours ELL instruction per week; average of 22 hours of patron participation per week (average 11 participants x 2 hours participation)	Increase number of patrons attending to 25 per week; offer monthly enrollment opportunities and attain min. 10 new patrons enrolling per month
Digital/Information Literacy Services	1 workstation per approx. 3300 patrons in West Hills neighborhood alone; average 30 minute wait-time	Triple workstations available (an increase of 12 to 36), lowering ratio to 1 workstation per approx. 1100 patrons; decrease wait-time to 10 minutes
Outreach/Marketing	670 followers/40,000 target population (1.67%); fewer than 1 post or Tweet per week	Increase followers to min. 8,000 (20%); regular posts or Tweets at rate of min. 2 per week

While we are on the right path in providing ELL services, access to technology, and marketing via social media; all of these needs and more are being expressed by our patrons. A very common request is for social services. We will need to find a way to facilitate connecting patrons to the appropriate social service resource while communicating that the library is unable to fill these needs directly. As the library is the community's main information hub, we are also seeing a rise in field-specific questions we are not qualified to answer, such as medical and legal inquiries. We need to think creatively about meeting these needs. Furthermore, spaces that are provided for patrons to gather and socialize are regularly over-crowded; the community needs a communal "third space," a neutral meeting ground away from work, home, or school. As a library hoping to function as a community center, we are in a position to meet this need and again will need to think creatively to do so in an innovative way that meshes well with the library's performance and goals.

New Priorities

Strategic Profile

The world has changed dramatically over the last fifty years. Technological innovations, greater connectivity between geographically distant places and people, and new social and economic realities have greatly influenced our society. Libraries have taken advantage of many of these changes to provide access to information in new ways. Successful libraries embrace change and strive to remain at the heart of their communities by meeting the ever-evolving needs of their patrons. The American Library Association's Office for Information Technology Policy has highlighted four trends that point to a future that is significantly different than our current reality: (1) continued advances in digital media and technologies, (2) heightened competition, (3) demographic transformation, and (4) financial constraints. These trends will certainly pose challenges for our library, but we look forward to taking advantage of new opportunities to transform our organization in order to best meet the needs of our diverse community. We hope to evolve in strategic ways that specifically account for the unique demography of the West Hills neighborhood and the community-building functions we hope to serve. We also acknowledge that our library must be strategically aligned with the technological and digital media landscape. We must support information literacy as this new digital environment continues to grow.

Future Vision

Our library has many competitive advantages over other information services that members of our community may seek. We honor the privilege that our community has bestowed on us as the heart of the community in a new and beautiful space. We acknowledge the pride that our community feels in our library as a symbol of information access for all. We will continue to provide convenient access to information and excellent service. We aspire to be a welcoming and inspiring center for lifelong learning, where our patrons can feel at ease as they gain knowledge and attain their goals. We value the diversity of the West Hills neighborhood and hope that through our library we can support the rich cultural fabric of our community through local collections, events, and community-oriented facilities. We hope that our dedication to the democratic ideals of our library will support our patrons as they become informed members of our community. We see a future in which emerging technologies and digital media play a large part; we recognize our duty to bridge the digital divide and provide opportunities for our patrons to acquire the technological proficiencies and media literacy that are necessary to navigate our modern world. Given all of this, we have prepared a new mission statement for the Aloha Public Library:

> **Our Revised Mission:** *The mission of the Aloha Library is to enrich and empower the community. The library is dedicated to change in response to the needs of our patrons. Our focus includes connecting patrons with technological opportunities, social services and a community center, therefore improving literacy and quality of life.*

Strategic Initiatives

Our patrons tell us that the services we offer that help advance literacy are the most important. We know that we must expand our services to adult English language learners to meet the needs of our patrons. However, as the world continues to advance technologically, we are aware of the need for our library to broaden our idea of literacy to include information and digital media literacy. We do an excellent job helping immigrants integrate into the community and join the workforce, but to continue to do this in our ever-more-digital world, we must keep pace with the demand for computer workstations. Many of our patrons do not have access to the Internet outside of the library; we see that we must close the gap in technological access that our patrons

currently experience. Moreover, we recognize that access is not the only piece when it comes to bridging the digital divide. We know that it is imperative that we support information literacy and technological skills in a digital environment. Therefore, one of our strategic initiatives is to **support a spectrum of adult literacy services, from ELL offerings to classes that teach technological skills and information literacy**. Objectives that support this initiative include:

1)   Decrease the wait time for computers for Internet use by 10%

2)   Increase the number of ESL classes

3)   Purchase online English language lab software

4)   Increase circulation by improving the library website

5)   Create a mobile app

As we designed our new library space, we were keenly aware of the shift toward decreasing the size of our physical holdings as we participate in more collaborative and patron-driven collection development. As we move away from large physical holdings, we were also attuned to the need for our library to re-envision the use of our space to best meet the needs of our patrons. We heard from many members of our community that they lacked a central meeting place for events, meetings, and exhibitions. Additionally, they saw the library as a symbolic place of learning and a source of community pride located in the center of culturally rich West Hills neighborhood. While many libraries are moving toward more and more virtual offerings, we envision our library as supporting community-building functions. This role is not easily filled by many of our information service competitors (Amazon, Netflix, etc.) and we recognize our unique ability to understand and support the endeavors of the members of our diverse community. Thus, another of our strategic initiatives is to **become a thriving community center that showcases the local history and cultural richness of the West Hills and supports gathering, teaching, and learning**.
Objectives that support this initiative include:

1)   Sponsor local monthly exhibitions/programs for specific ethnic groups

2)   Increase the library's usage of social media outlets

3)   Open up a coffee stand on the ground level of the library

4)   Connect patrons with social services in-house

5)   Connect patrons with specific librarians (i.e. law or medical) to help with specific needs

Action Plan

Strategic Initiative 1

To support a spectrum of adult literacy services, from ELL offerings to classes that teach technological skills and information literacy.

Objective 1: Decrease the wait time for Internet computers by 10% by purchasing 10 iPads for short-term (2 hour) in-house loan.

>   Responsibility: Library staff
>   Timeline / Action Items:
>> Phase 1 (months 1-6): Research potential grants for new technology, apply for selected grants
>> Phase 2 (months 7-12): Purchase iPads and advertise via website and signs @ library, run reports on wait times on Internet computers to use as a baseline
>> Phase 3 (months 13-18): Loan out iPads to patrons for short-term (2 hour) in- house loan
>> Phase 4 (months 19-24): Run reports again and compare to baseline
>   Measurable outcomes: Wait time for Internet computers will decrease by 10%
>   Resources needed: Staff time, financing
>   Budget: Cost will be $600/iPad/$6000 total (including cover and some basic apps, like Office)

Objective 2: Increase the total hours of participation in ELL classes by 20%

>   Responsibility: Library staff, volunteers
>   Timeline / Action Items:
>> Phase 1: Determine number of hours of participation by patrons who attended ELL classes in the last year, conduct a survey with current patrons/participants to determine optimal times/dates for classes and to gather suggestions for increasing participation in classes

Phase 2: Set-up schedule of ELL classes for months 13-24 using survey results to either add more classes and/or changing times/days, recruit additional ELL facilitators/volunteers as necessary to cover classes

Phase 3: Advertise classes via website (publish promotional material in target languages), signs @ the library, social media, during current classes & other programming

Phase 4: Conduct ELL classes, determine number of hours of participation and compare to baseline results

Measurable outcomes: Participation will increase by 20%

Resources needed: Staff time, classrooms, facilitators

Budget: $0

Objective 3: Purchase online English language lab software and have them available on lab computers and online via the library website

Responsibility: Library staff, volunteers

Timeline / Action Items:

Phase 1: Research software options and determine which software to purchase, survey patrons on best times/days for lab

Phase 2: Schedule weekly labs using information from survey results, recruit volunteers to facilitate labs, advertise labs (publish promotional material in target languages)

Phase 3: Hold language labs on a weekly basis

Phase 4: Assess participation, adjust lab scheduling as necessary

Measurable outcomes: Usage of software and participation in labs

Resources needed: Staff time, volunteers, financing

Budget: Cost of software

Objective 4: Increase circulation by improving the library website. Focus on ease of use so patrons utilize the website more to peruse catalog and place holds. Web improvements will be done by a small team of Aloha Library staff members who specialize in web design.

Responsibility: Library staff

Timeline / Action Items:

      Phase 1: Form a committee to be in charge of website improvement, set meeting schedule for monthly committee meetings, decide on survey questions for patrons' satisfaction with website using quantitative measures in addition to qualitative comments

      Phase 2: Conduct online survey, using survey results, determine areas of improvement, and assign action items to individuals and deadlines

      Phase 3: Complete improvements & roll out changes to website

      Phase 4: Conduct follow-up survey and reassess what works/doesn't work, assign action items for follow-up improvements as needed

Measurable outcomes: Patron satisfaction survey will improve by 20%

Resources needed: Staff time, possible software upgrades

Budget: Depends on committee findings for improvement action items, tentative budget will be no more than $4000 which will be taken from library's technology budget

Objective 5: Create a mobile app, through Boopsie Mobile, for the library so patrons have even more exposure to the catalog and can request materials.

Responsibility: Library staff, IT staff

Timeline / Action Items:

      Phase 1: Determine technology/financial requirements from Boopsie to create app, sign contract with Boopsie to implement creation of app

      Phase 2: Have Boopsie create app and launch, fix bugs as necessary

Measurable outcomes: Mobile app will be launched by end of year one

Resources needed: Staff time, financing for app launch and support

Budget: $1335 one time integration fee, $3645 annually

Strategic Initiative 2

To become a thriving community center that showcases the local history and cultural richness of the West Hills and supports gathering, teaching, and learning.

Objective 1: Sponsor local monthly exhibitions/programs for specific ethnic groups (i.e., Somalians, Hispanic, etc.) – specifically a monthly potluck with food, a movie and music from related group and related library material and artwork displayed throughout assigned month. Partner with local community organizations that specialize in working with each ethnic group to promote event.

> Responsibility: Library staff, community leaders
>
> Timeline / Action Items:
>> Phase 1: Form a committee to plan events, meet once/month for planning, brainstorm ideas for events, and set a tentative schedule for upcoming year
>>
>> Phase 2-3: Advertise and launch events/programs, measure attendance for each event
>>
>> Phase 4: Assess success of events/programs and make adjustments to schedule as necessary
>
> Measurable outcomes: Attendance numbers will be compared from month to month and evaluated
>
> Resources needed: Staff time, community leaders' time
>
> Budget: $0

Objective 2: Increase the library's usage of social media outlets, like Facebook and Twitter, by 20% to promote library's holdings of community materials, both historical and current.

> Responsibility: Library staff
>
> Timeline / Action Items:
>> Phase 1: Attend training and create training material for staff to use as guidelines for updating Facebook, Twitter and Google+, determine which library staff will do the updating and the schedule for updates, measure wall posts and followers and/or friends
>>
>> Phase 2-3: Follow schedule for increased postings
>>
>> Phase 4: Re-measure wall posts and followers and/or friends to determine change, determine areas of improvement and areas that are working and make changes as necessary

Measurable outcomes: Postings will be done a minimum of 4 times per week. Number of followers/friends will increase by 10%

Resources needed: Staff time

Budget: $0

Objective 3: Open up a coffee stand on the ground level of the library.

Responsibility: Library staff

Timeline / Action Items:

Phase 1: Determine requirements for minimum service wanted for coffee stand, advertise for businesses to apply

Phase 2-3: Decide on company to run stand, determine facility needs and contract out necessary work

Phase 4: Coffee stand opens

Measurable outcomes: coffee stand will open

Resources needed: Staff time

Budget: $2000 for plumbing and electrical set-up

Objective 4: Connect patrons with social services in-house.

Responsibility: Library staff

Timeline / Action Items:

Phase 1: Consult with libraries that currently have this service to gain insight on the process, contact county agencies to create possible partnerships and to see if there could be a social worker assigned to work/have their office on-site

Phase 2: Depending on results from Phase 1, if a social worker is available, set up schedule and objectives for partnership and plan for transition

Phase 3: Move social worker into new office space, advertise services

Phase 4: Assess effectiveness of services and determine any opportunities for improvement

Measurable outcomes: Library will have an on-site social worker with an office and who will do outreach within the building

Resources needed: Partnership with the county social services office

Budget: $0

Objective 5: Connect patrons with specific librarians (law, medical) etc to help with specific needs.

Responsibility: Library staff

Timeline / Action Items:

Phase 1: Network with librarians in other fields through OLA and Libs-OR listserv announcing our plan to have guest librarians and direct them to apply online

Phase 2: Interview and hire top applicants

Phase 3: Create a rotating one day per week schedule for librarians, promote new service to patrons through all promotion channels

Phase 4: Launch service and determine areas of improvement and areas that are working and make changes as necessary

Measurable outcomes: Library will have an on-site profession specific librarian who will consult within the building

Resources needed: Staff time, hourly salary for each librarian (no benefits given for this position)

Budget: $4,800 annually

Performance Management

Initiatives will be implemented in phases as to not overwhelm our staff and patrons. The roll out will be four-six month phases. Phases are generally broken down into research, implementation, assessment and reimplementation if necessary. Each initiative is balanced to draw patrons in and have the resources to support them. With new classes, events, personal reference services and coffee being offered, the staff is backed up by new technology, an improved website, a new mobile application, a social service worker and guest librarians.

Potential conflicts could involve staff time and budget concerns. Almost every phase involves these two resources. During the research phase staff will be delegated so that each job is given equally and no one staff person is overloaded. The budget will be laid out with some room for fluctuation. Having a flexible phase will

also help avoid conflict. During the assessment portion of the phase any conflicts can be addressed and taken care of in a timely manner.

Each objective is designed with a measurable outcome and budget from the beginning. The staff in charge of the objective will keep track of progress to see if the outcomes are being met and we are keeping within the allotted budget. If the outcome is not met or we are exceeding the budget by the assessment phase then revisions will be made at that time to make changes to keep close to the original goal.

The plan is to have all staff involved on that particular objective meet during the assessment phase and compare notes and propose and agree on revisions to be made. If there are revisions to be made the agreement is to make them by the time the assessment phase is over to keep within our time frame. The goal of the group is to keep things as simple and precise as possible as to not get hung up and behind the timeline.

Contingencies

Possible threats to a successful implementation of the action plan include applications for grants denied, lack of community support, low attendance at programs, lack of volunteers and staff burn out. These are not all likely to occur, but none should be ruled out completely.
In the even that grants are denied, steps will be take to follow-up with the institution(s) to figure out the cause. If the cause is something that can be remedied with a resubmission then that will be done as many times as it takes to obtain the grant. If that particular grant is going to be more effort than it is worth (i.e. staff hours) then another grant will be pursued.

If community support and program attendance are low then deeper connections must be made with community leaders to figure out the disconnect. A continuous push in marketing will also be made to brand the library.

The volunteer pool should have continuous new growth. If this branch has a challenge in securing volunteers then we will lean on other branches for help in asking if each could spare a few volunteers. During

the main volunteer orientation it will be asked that volunteers consider Aloha Library first since many new exciting changes are launching there.

Finally, to prevent staff burnout an open atmosphere of communication and support is encouraged. Staff members are asked to voice their concerns right away if they feel overloaded. Everyone is open to shifting workloads and delegation. Staff will have opportunities to work from home on occasion and take time off when needed. Aloha Library is going to be very flexible as long as we have coverage. The greater use of volunteers as personal assistants in this implementation phase is also encouraged.

Concluding Remarks

Due to some major changes to the Aloha Library in recent months, including relocation to the ground level of an apartment building, a new strategic vision and plan is needed to help the library address the needs of its community. The strategic plan described above has been designed to not only meet the requirements of our new community and local residents, but to address the current trends that are now part of the current reality of all libraries including advances in technology, heightened competition, changes in the local demographic structure, and financial constraints. Addressing these needs in a timely manner is critical to the success of the library, and to the lives of its patrons. By proceeding with a carefully developed plan in mind, management and staff can be assured that objectives have been carefully thought through, and that everything is being done for the benefit of the community. This document is the culmination of a combined effort on the part of all library and city staff. Everyone involved is fully aware of what is expected of them, and are satisfied that everyone has the skills, knowledge, and professionalism to successfully carry out their mission. We realize we have put forth an ambitious plan for our library and community but are confident in our ability to follow through for the greatest possible success. Despite whatever setbacks we may face in the implementation of our vision, we are sure that this plan will allow us to provide a better future for our community by providing them with the tools and the space they need to bring about their success.

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Appendix: Summary Report of Team Project Activities

Emporia State University

SLIM LI805: Leadership and Administration of Information Organizations

November 30, 2011

The Diving Hedgehogs:

Beth Caldwell

Katy Bogart

Visakha Seon

Maria Power

Thea Evenstad

Jessie Sweeney

Narrative

The Diving Hedgehogs first met on Skype on Wednesday, August 24, 2011. All members (at the time) were present, and the discussion lasted 20 minutes. This convention clearly marked the beginning of our group's "forming" stage: we discussed our purpose and organization in broad terms, ultimately settling on a focus on public librarianship. We discussed what our next steps would need to be, and chose an initial leadership structure, wherein Katy nominated herself secretary and Beth was appointed leader.

We met twice more online – switching from Skype to Adobe Connect because of connection problems – before meeting in-person during our first face-to-face class session. This allowed us to establish a routine of connecting online in weekly meetings. Another regular method of connection and communication grew out of our decision to create a dedicated Facebook group for discussion. During this time, the Diving Hedgehogs were still "forming"; communal decisions regarding structure and leadership were made, both through an organic process over time and deliberate discussion of plans. We began to narrow in on what would become our focus for the project and our process for completing it.

Our final meeting before class began our transition into the "storming" stage. Leader Beth presented us with a document she had drafted that divided up all of the work before us into sections, with a due date set for each. This would allow us to stay on track and complete our project with enough time to conduct careful review and editing.

We officially entered our "storming" period with our fourth meeting on Saturday, September 17, 2011. This was our first opportunity to meet face-to-face. Today Thea was added as the final Diving Hedgehog. During this meeting, we worked through a worksheet provided by our instructor. Thanks to this worksheet we addressed many aspects of team structure and functioning. Our team name was finalized after a productive brainstorming session. We assigned roles, including leader, secretary, presentation-maker, and document-collator. This meeting was a venue for a lot of great discussion and debate over how to regulate our activity as a group, which would fall under the "questioning" typical of the "storming" phase.

By our next meeting, on Wednesday, September 21, 2011, we entered our "norming" stage. Our sense of purpose had become clear and the group had a structure and routine with individual roles and responsibilities that operated smoothly. This was an exciting time!

Within the early days of October, the Diving Hedgehogs dove into their "performing" stage. This is recognizable due to launching into a schedule, as inspired by Leader Beth's due date schedule, with each member aware of her responsibility. Beginning at the group's sixth meeting, a routine developed that helped keep things efficient and productive: Visakha, who had been assigned the section with the first due date (the organizational profile), made a draft of her work available to the group. At the meeting, we discussed her progress, feedback, and possible revisions.

From here on out, meetings revolved around presentation and discussion of the section currently due. This meant each member took a turn "hosting" the meeting and explaining their process, progress, and any needs for feedback or assistance. With our continued weekly meetings, constant communication on Facebook, and joint editing of our document in the Wiki on Blackboard, progress was made rapidly. Our weekly meetings especially helped us feel we had everything under control and were on track to complete our tasks well and with plenty of time. Having divided tasks and assigned roles relatively early also brought a lot of helpful structure to

the process; it was also important, however, that we practiced flexibility and cooperation. It was obvious when some sections had become more work than others, and team members frequently stepped in with assistance in completing or proofing a section.

Meeting Minutes

Group Meeting #1 -- on Skype Wednesday, August 24, 2011

Present: All members

Duration: 20 minutes

- Katy nominated herself as secretary of the group.
- We agreed to do our project on public librarianship.
- It will be important to consider: marketing; digitization; making/keeping your library current, relevant
- We discussed environments, the possibility of working with a specific, existing library (rather than inventing a scenario)
- Working from the starting point of a public library, we will need to decide setting -- rural? urban? size of the library, collections, user population?
- Future meetings will be held in Adobe Connect via BlackBoard.
- We will establish a brain-storming thread in our group on Facebook.
- Create a collaborative document in Google Docs?
- We will meet every Wednesday at 9 PM (beginning Sep. 7) in Adobe Connect.

Group Meeting #2 -- Adobe Connect Wednesday, September 7, 2011

Present: Beth, Maria, Jessie, Visakha (Absent: Katy)

Duration: 1 hour?

Notes by Visakha

- Read article Katy posted on Facebook. Write your thoughts on our group wiki (we are going to try this vs. Google docs for now).
- Under each section (i.e. overview, the organization, guiding values and mission), each team member can post notes/ideas.
- Next mtg (next Wed) we'll discuss postings and moving forward divvy up sections under "preparation/planning".
- Themes we are going w/public library, low-income housing connected to library, ESL/homeless/low income patrons.

Group Meeting #3 -- Adobe Connect Wednesday, September 14, 2011

Present: All

Duration: ~30 minutes

- due dates schedule - Beth
- assign roles etc: Sat.
- we need more research, info
- What will need the most discussion: strategic initiative -- needs to be very specific
- look through resources Prof. sent to see if any worksheets we want to use
- between now and Sat- look over emails, articles, due date doc, team name

Group Meeting #4 -- in class Saturday, September 17, 2011

Present: All, adding Thea to group as well

Duration: 1 hour

- **Team Goals**
- **Team Name**

We will discuss this on FB. Free divers / Hedgehogs / Free-diving Hedgehogs / The Diving Hedgehogs logo! Branding!

- **Roles**

Leader Beth
Secretary Katy
Presentation-maker Maria
Document collator Thea

- **Team Norms:**
- Decisions
- Everyone agrees, in case of tie Beth has executive power
- Meeting Times
- Wednesday nights at 9 on Adobe Connect, remember to record. Time goal: 30 minutes.
- Attendance
- One or two absences okay. Just make sure to follow up with someone, let know in advance if possible, and catch up by recording/minutes. Email w own progress report?
- Assignments
- If someone doesn't meet a deadline, offer help. If you know you are having trouble try to let people know before deadline. Maybe give revised deadline. Communicate openly.

- *Have review session in meeting together to discuss document as it develops, constructive editing and feedback.
- Participation
- Ask for opinions, feedback, and input. Weekly meetings makes it easier to share. Use "raise hand" feature in Adobe Connect.
- Communication
- Express feelings and personal needs. We've been using Facebook for communication outside of meetings and work on document. We are all still OK with this. Check FB daily. If posting on FB and want replies, make sure to add note asking for input/answers/responses. Respond to these within 24 hours. Respond to emails within 24 hours. If will have period of unconnectivity, give advance notice. If you don't hear from someone within period you expected to, follow up with them.
- Etiquette
- We are respectful. No personal attacks.
- Agendas & Minutes
- Agenda set/discussed at end of each meeting for next meeting. Confirmed in minutes/refer to minutes. Katy (secretary) takes minutes. Will post minutes within 24 hours.
- Enforcement
- Beth can enforce! Let her know if you need some enforcing.
- Next Wed meeting: talk about divvying up and what needs to be done with whole group.

Movie: 12 Angry Men
V & T to rent

We shared phone numbers and everyone said that texting was an ok way to communicate.

Group Meeting #5 -- Adobe Connect Wednesday, September 21

Present: Beth, Visakha, Jessie, Maria, Katy, Thea

Duration: ~1 hour

Maria looked at the sample strategy plans Rajesh sent the class. There are five and they are all over 40 pages (approx. 20 pages report, 20 pages of minutes). They emphasize bullet points and graphics; this makes them much more readable. Maria especially recommends the paper by the Possibilitarians.

- To do: look over the sample papers. Especially focus on your assigned topic/section.

Division of labor: base off of Beth's document with due dates. There are 6 sections, 6 members; everyone takes one and is responsible for making sure that section of the paper gets done. Everyone will contribute to each section within the Wiki.

We considered our library's mission. Factors to consider about the library we've decided upon: low-income and ESL patrons; apartments in building. We looked for Rondo (the library we are basing ours on)'s mission

statement; as a branch of the St. Paul PL system they didn't have a unique mission but St. Paul Public Library does have mission, vision, strategic plan on their site.

- Look at St. Paul Public Library's mission, vision, goals/objectives, strategic plan documents. Also check out Multnomah's mission.

We discussed possibly focusing on a single department of the library, which Rajesh had mentioned. We were particularly interested in Outreach.

Brainstorming: 2 goals; focus on revitalizing community; importance of technology. What do community members say are needs that are not being met currently in the library? Digital divide. Social service referrals.

ESL: our library has a large ESL population. Possibility: "learning lab" with computers available for patrons to learn software, computer use, and use ELL software. Ideally, always open and available; can be minimally staffed (but at least one staff member to assist).

We want to have some kind of mock-up of a community analysis. In particular it would be interesting to survey the residents of the building, noting their first languages, English literacy, etc.

We initially chose 2 goals to focus on: addressing the digital divide/tech literacy needs; and adult literacy. Following more discussion we decided to also include a focus on social services and how to navigate the line between addressing and meeting these needs without trying to become a social service agency (ie, how to provide connections and referrals to social service resources for patrons). Instead of making this a third goal, we plan to tie this objective into our mission and where possible our second goal of adult literacy.

- Goals: 1) Digital literacy and access to technology

    2) Adult literacy, esp. but not limited to ESL

Maria discussed a past project she has done on providing services to urban homeless patrons. She offered several real-life examples of using the public library as a bridge between patrons and social services, including: having a social worker stationed within the library; implementing a peer mentor program.

Next meeting: Wednesday, September 28. This week:

- read sample strategic papers
- read St. Paul Public Library's mission and vision statement, others (MultCo)
- begin to set up/work on assigned section of paper (see Beth's document).

Group Meeting #6 Adobe Connect Wednesday, September 28

Present: All

Duration: 40 minutes

Agenda:

1) Organizational profile -- by Visakha, on Wiki -comments, input, change, progress?

2) New priorities section -- by Thea, upcoming second deadline

1

- Visakha: planning to add more and expand her section. Aiming for 1 page length for organizational overview, and 1 page of guiding values in bullet point form
- Storyline: MSP-area library newly relocated to an impoverished area, within a residential building. The relocation (and the resultant shifting demographics of user population) explains the motivation for doing a new strategic plan at this time.
- Thea suggested the overview was too general and should be more focused on the library rather than the community, so Visakha is going to move some of the community info from the organizational profile to the general overview, keeping the org. profile strictly to the institution of the library
- We discussed a timeline for our strategic plan; possibilities seen ranged from 2-5 years. Agreed upon a 2 year plan.
- Where does the community profile fit? Visakha has written some of this in her section. It should be included broadly in the overview, as well as in the environmental scan.
- Visakha requested people post any comments, criticism they may have for her section in the wiki as she develops it.

2

- The due date for the next section, Thea's, is currently 10/5. She plans to post a draft to the wiki by Sunday, 10/3, and would like feedback. Aiming to complete section by next Wednesday.
- Next week's meeting: Katy won't be present.
- We discussed the movie assignment (due 10/30) and the Portland folk set up a viewing party, which Thea and Katy will attempt in Eugene as well if possible! Thea leaves for Alaska on W Oct 12, and several of us have class next weekend.
- We also discussed the presentation briefly, agreeing that everyone should present the section they are compiling for the paper, so keep talking points and visuals you may want in mind while working. The emphasis in the presentation will be on our action plan.

Group Meeting #7 Adobe Connect Wed 10/5/11

Absent-Katy (sorry we forgot to record the meeting for you!)

Duration: 45 mins

Agenda:

-Review New Priorities, posted by Thea on Blackboard wiki

-check out the document that Thea cites, input, changes?

-Discuss Action Plan section --Lead by Maria --Due October 19

- Re Thea's portion: community building function important and an advantage for our library over other business'/community centers
- Goals/initiatives (review pg 14 of the 805 Assignments document) will revisit after action plan is written

- Maria will go ahead and start writing her portion may end up splitting initiatives to include addressing digital divide and adult literacy.
- Agreed that **initiatives** are specific, **goals** are broad and **objectives** are "how are we going to make that happen". Referred to Whichiporia strat plan example.

- Agreed to all site a few (3?) references when compiling our section. If we find an article/study that is in line with how we came up with our plan use that as a source. Share sources with group members if you find something that relates to what they are writing. Ideas for sources can include past class readings or sources we used for other projects.

Next meeting Wed 10/12 7p Movie "12 Angry Men" at Maria's house followed by 9p Skype, Thea will be absent, but will try to review Maria's portion and give feedback beforehand.

Group Meeting #8 Adobe Connect Wednesday, October 12, 2011

Absent: Thea

Duration: 1 hour

The group minus Katy & Thea met earlier to watch the movie (12 Angry Men) together. Katy was in Eugene and Thea was en route to Alaska!

For Maria's section, she worked with our initial 2 strategic objectives of adult literacy and community. We

looked at the action plan she drafted to meet these objectives. There was a question about the wording of increasing ESL -- whether services or participation should be measured, and how.

For the second objective of becoming a cultural community center, we discussed the importance of relying on partnerships with other community organizations.

Timing: how detailed does our timeline need to be? Sketch out in phases or detail step by step? For now we agreed we just need to lay out phases (implementation etc).

We discussed whether increasing circulation might be an important goal and how this might relate to funding. This ties in to our objective of improving adult literacy. Visakha mentioned the importance of the library website and the possibility of a mobile app as ways of increasing access and subsequently circulation.

Beth brought in some information from her past project on the digital divide in regards to outreach. There was mention of the residents of the housing project in the shared building as a particular target for outreach.

We reviewed the instructions which call for examining how our objectives and steps can be implemented in relation to one another, synergy, possible conflict, etc. This confirmed our discussion that the timeline doesn't need to be more detailed than in 'phases'. We further discussed contingencies that could threaten the successful implementation of our plan. In regards to Maria's steps we discussed low participation/attendance as such a threat. Visakha made a connection to another course and described how a community needs analysis could be a good response to such a situation. In particular the use of key informants in community analysis reinforced our emphasis on the importance of involving community leaders.

The social service aspect previously discussed was brought up again and how the library might be able to help patrons make connections and empower them to locate/utilize resources to meet their needs. Examples: LA with a social worker stationed in the public library, MultCo offering tax classes at tax time. An e-book seminar happening at MultCo was mentioned and someone made the great comment "That's a lot of terms [Kindle, LibrarySense, Library2Go, etc] -- and I speak English!"

We decided to change the second strategic objective to include this social service connection aspect, differentiating between a cultural center and a community center. While part of the objective will remain to showcase local culture and history, this isn't the main focus; rather, gathering, teaching, and learning in the process of showcasing local culture and history will be emphasized.

For next week: Visakha will add some about a mobile application/website etc. Maria will add some on social services to the 2nd objective. Beth will draft her section and will also post an article to Facebook that we should

read: regarding the Aloha Library, which is in its first year of existence and serving a traditionally underserved population. There are parallels here to our library and we will consider shifting the location of our library.

Group Meeting #9 Adobe Connect Wednesday, October 19, 2011

Present: All

Duration: 50 minutes

Maria will work on phases of our timeline this week. Visakha will help. We will all look at this and contribute to it on the Wiki. We need to cite research articles for our bibliography, at minimum 3 per section, so research for your section.

We discussed the preparation planning that should precede the action plan. Who is involved, what are factors, what staff positions/roles are we taking on – it was suggested that we not all take roles of senior staff, in order to include a combination, such as community outreach director or staff liaison, volunteers, assistants, IT, bilingual staff, etc.

What might limiting factors be? $, resources, especially an increase of those needed due to setting up in a new location. We discussed the importance of relationship building within the community, and how sharing a building with residents would be both a challenge and a strength, as almost a built-in clientele.

Since our building is new and was custom-built for its current purpose, we decided there will be a large gathering space, a kitchen, and other resources needed for such community-building events as monthly potlucks. We discussed possibly needing to invent a conflict within our staff or the board in order to be realistic. The restrictions of limited staff time, reduced hours, being short-staffed, etc are the universal current reality, so building conflict around these issues is realistic.

Next week: discuss the action plan further. Everyone to look for articles. Send any pictures to Thea.

Group Meeting #10 Adobe Connect Wednesday, October 26, 2011

Absent: Thea

Duration: 30 minutes

The group checked in with each other, answered questions, and received feedback. The meeting was short as no sections were due this week.

Group Meeting #11 Adobe Connect Wednesday, November 2, 2011

Absent: Thea

Duration: 20 minutes

Visakha contacted Boopsie and will hopefully get an estimate for the cost of a mobile service. She updated the Wiki and will help Maria after this weekend.

Maria asked for help with our last objective, regarding the special librarian/advice scenario.

Beth updated her section on preparation planning. Look it over and check our own "job descriptions", and edit if/as desired.

Currently the document is at 12 pages, aiming for 15-20, so we are on track.

Beth will create a table or other graphical representation of our budget.

The next section is current reality, due 11/16, by Katy -- SWOT, environmental scan, gap analysis. Katy will work on a draft by next week, and will also start a draft of the minutes report (team forming, storming, norming etc).

We will brainstorm thoughts on contents and images for the presentation this week on Facebook.

Group Meeting #12 Adobe Connect Wednesday, November 9, 2011

Absent: Thea

Duration: 30 minutes

Visakha added to the action plan -- we will pay the special librarians 20$/hour for their drop-in hours.

Visakha heard from Boopsie; a mobile app is very expensive.

Beth posted an article on FB -- read.

Also, we all need to find articles to build our biblio.

Maria will start the presentation and stick it in Bb file exchange. She'll announce this on FB when she does.

Jesse can help with compiling the document -- she will email Thea to discuss this.

Beth will email our draft to Rajesh for feedback.

We have 2 weeks left to meet before due date. Last week will be esp. important to go over everything.

Katy's section is due Wednesday (11/16); the summary and concluding remarks are due 23rd.

To do: find articles for bibliography; look for videos or think of activities to incorporate into our presentation; read Beth's article; read Rajesh's feedback (Beth will forward).

Group Meeting #13 Adobe Connect Wednesday, November 16, 2011

Present: All!

Duration: 40 minutes

Maria will work on and post the presentation this weekend. She mentioned that Rajesh gave suggestions for specific slides to include in the presentation, which leads us to plan for a more formal style than we had originally envisioned. The presentation time has been cut to 20 minutes of talking, 10 minutes for Q&A. As we all need to talk this is about 3 minutes each, which is definitely doable!

Katy will complete Current Reality section with Visakha's feedback from Facebook and set up the report on group development... and review the instructions for this part of the assignment. We couldn't find the article that is referenced in the framework for this report (storm, norm, form, etc) but Beth found several resources and finally the article in question!

Thea and Jessie will compile the report in a Word document, including a Table of Contents.

To do: post personal portrait for bio; find and post photo to use within your section of the report.*Important: complete and finalize your sections of the paper. When you are done with a section, change the font color to green in the Wiki document. This will signal Thea and Jessie that it has been completed and they may use this version of the section in the final paper. Aim to get this done by Friday/Saturday and Jessie will work on over weekend.

We will incorporate any references in a reference list at the conclusion. Visakha will compile this, if anyone has sources to add, please get her the citation in APA style!

We will meet on Tuesday, 11/22 next week, and Tuesday, 11/29 the next week for a run-through of the final document.