



Attendance: Daniel Gordon, Linda Lyshol, Sue Smith, Martha Watson.

- The Public Services Committee met on Monday, March 27th, to discuss the four companies that submitted an RFP for Strategic Planning.
 - The four companies are The Ivy Group Ltd., Maverick & Boutique, W.J. Schroer, and Wiseman Consulting.
 - The Committee discussed the pros and cons for each company. It was unanimous that the best company for Strategic Planning should be Maverick & Boutique.

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WE KNOW CHANGE BECAUSE

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March 16, 2017

Linda Lyshol,
Library Director,
Branch District Library
10 Chicago Street,
Coldwater, MI 49036

By email: [REDACTED]

Dear Ms. Lyshol,

Consultant Services: Comprehensive Strategic Plan for Branch District Library

A. Straus & Associates, Inc., DBA Maverick & Boutique, is a Massachusetts-based consulting firm that specializes in helping organizations, government and communities develop and implement strategies and build capacity to realize their desired futures.

We are pleased to present this proposal to help the Branch District Library develop a comprehensive strategic plan to guide your activities for the next five years.

Our contact details are as follows:

Firm: Maverick & Boutique

Tel: 413-489-3343

Principal Contact: Abby Straus, President

Website: www.maverickandboutique.com

Address: 102A State Street, Shelburne Falls, MA 01330

Email: [REDACTED]

The proposal is valid for six months from the date of this letter.

I am authorized to bind the firm to the terms of the attached proposal.

Respectfully submitted,



Abby Straus
President



Strategic Plan for the Branch District Library



Proposal prepared by:

Maverick

& Boutique

WE CAUSE IT
WE KNOW CHANGE BECAUSE

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Contents

Executive Summary..... 4

Summary of Qualifications and Experience 5

 Descriptions of Recent Projects 6

 The New Jersey State Library 6

 LibraryLinkNJ, the New Jersey Library Cooperative 6

 John. S. Watson Institute for Public Policy/New Jersey Urban Mayors Association 7

 Massachusetts Library System 7

 La Crosse Public Library..... 7

 Cozby Library and Community Commons 8

 I-86 Corridor Strategic Plan, NY 9

 State of Vermont..... 10

Personnel 11

Work Plan..... 14

 Description of the Strategic Planning Process 14

 Task 1: Project Kick-off Meeting and Guided Tour 14

 Task 2: Information Gathering and Review 14

 Task 3: Targeted Interviews 15

 Task 4: Surveys 15

 Task 5: Facilitated Workshops with the Staff, Board and Stakeholders 16

 Task 6: Synthesize Workshop Outputs into 6-7 Strategic Goal Areas 18

 Task 7: Project and Program Design 19

 Task 8: Deep Dive Workshop 20

 Task 9: Development of High Impact Measures 21

 Task 10: Draft the Strategic Plan..... 22

 Task 11: Review the Plan 23

 Task 12: Present the Plan to the Board..... 23

References 25
Cost Proposal 26
Appendix 1: Inventory of Future Roles for Libraries 28
Appendix 2: Technological change, learning and knowledge creation 32
Appendix 3: Sample Strategic Plans..... 34



Executive Summary

Executive Summary

Maverick & Boutique (M&B) has developed a program of activities to help the Branch District Library staff, board and community develop a comprehensive strategic plan to guide the library over the next five years. We bring to your project robust processes, and thinking frameworks that help participants think creatively to make a new and better future together, and research methods that help reveal and anticipate emerging needs and the services to delight patrons.

The planning process would begin in April-May 2017 and be completed by August 2017. Highlights of the process are:

- **Kick-off Meeting/Visit:** including opportunities to meet and talk with staff and board members, a tour some of the Library branches to understand their relationship with the townships in the area, begin the interview process and conduct an initial pilot planning session with you and your board.
- **Interviews with Staff and key Stakeholders:** with staff, board, township officials (both elected and management), and other key stakeholders to better understand how the library operates and deals with current community issues.
- **Workshops using our Zing™ collaboration system:** that guides county/township officials, staff, board, friends and other community stakeholder participants through a complete planning process in a few hours to create new projects and results in commitment to the plan, which we call "join in"
- **Research:** National, regional and county population and other trends such as emerging services concepts, and impact on the library and the community.
- **Surveys:** using up to five surveys to identify new service needs and opportunities, especially with new partners or underserved populations, users and non-users.
- **Ready-to-Implement Projects and Programs:** including new and/or enhanced projects and programs, which are much easier to implement than abstract strategies.
- **A Deep Dive Workshop:** to craft strategies in 6-7 goal areas, a vision, mission and values and to discuss critical issues of staffing, resources, how to deal with technological change and continue to adapt to meet the evolving needs of all stakeholders.
- **The Plan:** comprising three versions: an executive summary, a full plan including projects/programs, and a slide show including vision, mission, values, goals, strategies, projects, action plan and strategic measures, plus a data package of all reports, evaluations, surveys etc.
- **Presentation to the board:** In August, we will present the completed plan to your board.
- **Project Management:** comprising skype/phone meetings and regular reports.



Qualifications and Experience

Summary of Qualifications and Experience

Maverick & Boutique was founded by Abby Straus and John Findlay in 2011 to help people deal successfully with three of the biggest challenges that organizations and communities face today¹: how to capitalize on complexity, connections and accelerating change.

We have created a set of simple, reliable methods for strategic planning and implementation, based on the science of complex systems and originally developed for the complex project management community worldwide. We have since applied them extensively and successfully to our work in economic and community development, innovation and organization transformation in local communities and regions in the US.

We have a special interest in working with libraries. We regard them as one of the key players in helping to revitalize communities, especially as we move into a post-knowledge age society, where the wise application of knowledge is a critical skill for people and a vital capacity for organizations and communities.

In its 2014 report, *Rising to the Challenge: Re-Envisioning Public Libraries*, the Aspen Institute Communication and Society Program cites the public library as “a key partner in sustaining the educational, economic and civic health of the community during a time of dramatic change.”²

This exciting new view of libraries is also spelled out in great detail by Professor David Lankes in his timely book, *Expect More: Demanding Better Libraries for Today's Complex World*,³ whose recommendations are being adopted by libraries to develop new roles in their communities.

Many of these new kinds of activities are examples of the library playing a role as a community anchor institution, in new business incubation, job readiness and skills development, emergency preparedness, a facilitator of crucial community conversations, and contributor to the wise application of knowledge in partnership with community service organizations, which we describe in Appendix 3.

Last year we developed strategic plans for the *Massachusetts Library System* where we are continuing to support implementation, the *La Crosse Public Library* in Wisconsin and the *Cozby Library and Community Commons* in Coppell, Texas. Example strategic plans are shown in Appendix 3.

We are currently developing a new strategic plan for *LibraryLinkNJ*, having developed their current plan four years ago, and strategic plans for the *Clifton-Half Moon Public Library* in New York, the *East Brunswick Library* in New Jersey and the *Kurth Memorial Library* in Lufkin, Texas. We recently

¹ IBM Global Survey of CEOs in 2008, 2010 and 2012

² Aspen Institute Dialogue on Public Libraries, *Rising to the Challenge: Re-Envisioning Public Libraries*, Washington, D.C.: The Aspen Institute, October 2014, p. IX

³ Lankes, D. (2015). *Expect More: Demanding Better Libraries For Today's Complex World*

completed the strategic plan for the **New Jersey State Library** where we are now assisting with implementation and are currently designing a leadership program for the **Reaching Across Illinois Library System (RAILS)** for delivery in 2017-2018.

In our work in strategic planning for economic development in Vermont, New York and New Jersey, we have worked closely with the libraries in each region, involving them as key partners in the delivery of new value-added services, particularly for workforce/skills development, the establishment of incubators/accelerators and makerspaces, in emergency management and in providing meeting places for important civic interaction and deliberation.

Descriptions of Recent Projects

THE NEW JERSEY STATE LIBRARY

During 2014-15, M&B helped guide the New Jersey State Library through a strategic planning process designed to give staff major responsibility for the creation of the plan in order to strengthen ownership of the plan, and develop their capacity to replicate the process, so that strategic planning becomes a way of operating on a daily/weekly basis. The process was also designed to help build collegiality across the boundaries of departments, integrate activities through high levels of coordination, achieve synergies and efficiencies, and establish a climate of innovation and entrepreneurship. As a result, the Library is now more capable of anticipating the changing needs of its constituents and able to reinvent itself when circumstances shift, as they inevitably do in a rapidly changing world.

LIBRARYLINKNJ, THE NEW JERSEY LIBRARY COOPERATIVE

During 2012-13 M&B facilitated and developed a state-wide strategic plan for the 2,000+ public, academic, business, school and special libraries in the state of New Jersey. The strategic plan, including individual executive summary and condensed version, may be viewed at:



<http://librarylinknj.org/about-us/statewide-strategic-plan>

Over 150 people participated in the creation of the plan, including a series of strategic planning workshops conducted throughout the State of New Jersey, on-line task forces to develop 33 detailed project plans, surveys of library patrons and young people and interviews with key influencers and stakeholders. The process is similar to the approach we will use for your strategic planning activity. A step-by-step-mind map of the strategic planning process including background notes, presentations, meeting outputs, and survey data can be seen at:

<https://www.mindmeister.com/237766551/lnj-strategic-planning-process>

This state-wide plan revolves around six goal areas comprising Communicating the Value of Libraries, Leadership and Coordination, Collaboration & Partnerships, The Library as Community Anchor, Cycles of Innovation, Professional Development & Self-Care and Creative Funding Sources.



JOHN. S. WATSON INSTITUTE FOR PUBLIC POLICY/NEW JERSEY URBAN MAYORS ASSOCIATION

In partnership with Camoin Associates, an economic development consultancy, M&B facilitated strategic planning activities for the Comprehensive Economic Development Strategy (CEDS) steering committee consisting of leaders from public, private and non-profit sectors gathered to create a regional economic and community development strategy for 19 urban communities in north central New Jersey.

On the advice of M&B, the client invited the library community into the planning process, whose members not only made a major contribution to the development of the plan, but also figure prominently in the projects adopted in the plan. These projects include playing a role in emergency services, hosting workforce development programs, facilitating and informing crucial community meetings and discussions, fostering entrepreneurship via research, incubators and accelerators, as well as participating in local scale product design and manufacturing.

MASSACHUSETTS LIBRARY SYSTEM

During 2016 M&B facilitated a strategic planning activity with the Massachusetts Library System, including capacity building of library leaders to equip them with the necessary skills to develop and promote a culture of co-creativity.

MLS plans to help member libraries work together with new partners, expand their capacity for marketing and communications, and be "future ready".



LA CROSSE PUBLIC LIBRARY

M&B designed and facilitated a strategic planning process to enable the citizens of La Crosse, Wisconsin the board and the staff of the library and city leaders develop a strategic plan for the La Crosse Public Library during the first half of 2016.

The library staff, the library board members, senior city officials and citizens representing business and community organizations or themselves, participated in strategic planning workshops, a complete end-to-to-end conversation-based process that explored the context and trends, stakeholder and personal interests, a strategic analysis of the library's capability to implement the desired changes, desirable initiatives and the values the library might live by.

Most of the participants in the initial workshops also joined project teams that developed 21 priority projects in considerable detail. At a subsequent Deep Dive workshop, staff and board members explored the main issues facing the library and developed vision and mission statements as well as goal statements and strategies to achieve the goals.



More than 400 people participated in the process via interviews, in workshops and through on-line contributions, surveys and personal communications. Twenty interviews were conducted with key people to deeply understand the issues.

Some 237-people contributed to the on-line version of the strategic planning process or the paper version available in the library. The workshops and on-line survey generated over 100 pages of ideas, opinions and analysis.

A list of 230 project ideas were created and assigned to seven tentative goals areas. The project ideas were circulated to senior staff who were invited to comment on the feasibility of the proposals and the capacity of the library to implement the proposed changes.

A team of seven students from the University of Wisconsin at La Crosse conducted a series of surveys to support the workshop process. These included a survey of organization readiness for change, surveys of new partners to explore what new services would be desirable for the members of their community, a non-user survey, and a library as a community anchor institution survey which considered what other facilities such as a restaurant, cinema, offices or gym might be advantageously co-located with the library or what new services they might jointly offer.

COZBY LIBRARY AND COMMUNITY COMMONS

Over four months in mid-2016, M&B worked with 250 people to create a strategic plan for the Cozby Library and Community Commons, in Coppell Texas. Participants included library staff, school students, Friends of the Library, library board members, city officials and citizens representing business and community organizations.



Five strategic planning workshops were held over a three-day period in which participants contributed their ideas to a conversation-based process. Participants explored the context and trends, stakeholder and personal interests, a strategic analysis of the library's capability to implement the desired changes, and 64 project ideas and 15 Rich Pictures, visual descriptions of how the library would function in the future.

A series of surveys were conducted including an organization alignment survey, a non-user survey and a library as a community anchor institutions survey to consider what other facilities, such as a restaurant, cinema, offices or gym might be advantageously co-located with the library or what new services they might jointly offer. Links to these surveys accompanied the water bill. The members of partner organizations were surveyed; these included Rotary and the Coppell Early Childhood Association.



Project teams of staff and citizens developed 10 highly detailed priority projects. At a subsequent Deep Dive workshop, the strategic planning committee explored the main issues facing the library and developed vision and issues statements, goal statements and strategies to achieve the goals, and a set of values statements.

Interviews were also conducted with 20 staff and community leaders to thoroughly understand the issues facing the library and to explore new possibilities.

I-86 CORRIDOR STRATEGIC PLAN, NY

M&B, in collaboration with an economic development firm, designed and facilitated an accelerated strategic planning process for the I-86 corridor to meet a tight six-week deadline from start to finish to prepare for a one-off state-wide competition for large-scale investment funding. The project involved two counties, seven municipalities, and 80 stakeholders representing utilities, business, education, community and local government groups.



Our work resulted in the I-86 corridor consortium and its partners in nearby Binghamton, which forms the Southern Tier, being awarded a \$500 million investment from the State of New York to fund their projects.

The principals of M&B employed a combination of the Zing™ collaborative meeting technology, systems maps, and project planning templates, to guide participants through the strategic planning process. The result is an ecosystem of 50 fully developed, systemically inter-related projects/programs. Each project/program is described in considerable detail including action steps, strategic measures, governance, anticipated budget and funding and physical resources and talent required.



The workshops were conducted in two blocks of three days during which the participants prepared detailed project plans for infrastructure, innovation, industry development, governance, creating vibrant communities, workforce development and education, and tourism/marketing/branding.

M&B also facilitated a series of robust conversation with the steering committee to develop a corporate structure and implementation process to ensure the many participating stakeholder could work together flexibly under the auspices of an overarching governing body charged with project management oversight.

STATE OF VERMONT

Maverick & Boutique were the project managers and members of the team that developed a Comprehensive Economic Development Strategy (CEDS) for the State of Vermont in 2013-14.

Maverick & Boutique facilitated stakeholder engagement meetings in nine regions, conducted workshops with cabinet level officials, developed some 70 initiatives in six key areas – with a strong emphasis on developing the capacity of the tourism and working landscape sector to capitalize on the trend towards consumer interest in high-value added experiences, the revitalization of villages as destinations, and developing skills in village scale government administration, green energy, agriculture, forestry, advanced manufacturing, health and IT.



The participants at the eight regional meetings participated in the same strategic planning process contributed and shared their ideas using the Zing meetings system, including the environmental scan, dynamic SWOT analysis, stakeholders needs and interests identification, capacities and resources assessment and conceptualization of initiatives. The transcript can be viewed at:

<http://accd.vermont.gov/sites/accd/files/Documents/business/CEDS/VT%20CEDS%20Regional%20Meeting%20Notes.pdf>

Four initiatives were developed with the State Librarian. These included a project to help Vermont libraries to become community anchors for learning, economic development and civic engagement, a project to build a tech-savvy workforce via a Statewide Digital Literacy Network, to participate in a Traditional Working Landscape Skills Training, and to be a center for new village-scale models of Vermont Creativity in artisanal foods, timber products, software development and design, and visitation.

Links to sample strategic planning documents may be found in Appendix 3 below.

Personnel

The consultants who will work on your project and their credentials as they relate to libraries and strategic planning are:

Abby Straus, M.Div.

President, Maverick & Boutique



Abby is a pioneer in the field of leadership and strategy for complex environments. She partners with individuals, groups and organization systems as a facilitator, workshop leader and coach, helping people develop plans of action and methods of interaction to collectively create a more successful future.

She has a BA in cultural anthropology and a master's degree in divinity and works with a number of tools including Systems Thinking, Polarity Management, Appreciative Inquiry, the Leadership Circle 360 and Culture Survey and the Conscious Pursuits Spiritual Intelligence instrument.

Abby has co-developed a cadre of practical tools that support her clients in proactively leveraging possibility and creating their preferred futures in the midst of complexity, ambiguity and rapid change. She has developed applications of the science of complexity that provide both a context and processes for innovation and collaboration across the boundaries of professional disciplines, world views and organizational structures.

Abby is a member of the board of the North East Economic Developers Association. She is the proud mother of a twenty-four-year-old son and an avid yoga practitioner. She lives in the Pioneer Valley in Massachusetts.

Recent projects include:

- **NJ State Library:** Strategic plan and now a second contract to assist with organization development and implementation.
- **LibraryLink New Jersey:** State-wide strategic plan
- **Massachusetts Library System:** State-wide strategic plan
- **Clifton-Half Moon Public Library New York:** Strategic Plan
- **State of Vermont** -Project Manager/stakeholder engagement for the statewide Comprehensive Economic Development Strategy
- **Thomas Edison State College/John S. Watson Institute for Public Policy:** Comprehensive Economic Development Strategy

- **Passaic County, NJ** – Comprehensive Economic Development Strategy
- **American International School, Rotterdam, The Netherlands** – Strategic Plan
- **Defense Acquisition University, Fort Belvoir, VA** -Facilitation of Department of Defense project management forums/strategic planning/leadership development

John Findlay Ph.D., M.B.A.

Chief Program Designer, Maverick & Boutique



John has over 30 years of experience in strategic planning, community consultation, futures forecasting, organizational transformation, politics, infrastructure and new business development.

An Australian native now living in Shelburne Falls, MA, John brings an international focus to our work with clients in over 20 countries including defense/complex project management (Defense Department, USA, Boeing, Australia and General Dynamics, USA), school education (over 200 schools around the world), financial services (UBS in Singapore, Japan, China, Switzerland, the United Kingdom and the USA, BUPA Australia and ING Australia), energy (Chevron, USA and Aramco, Saudi Arabia), innovation (Innovatika, Poland, Gemba in Denmark, Hargraves Institute, Australia and Future Centers in England and Saudi Arabia as well as Chevron and Hallmark cards in the USA) and international development (BRAC, Bangladesh, UNICEF in Uganda and Management Science in Health, USA).

His current focus is on helping communities in North America to become more capable of adapting to accelerating change, and be able to curate and apply their knowledge wisely. He has a Ph.D. from the University of Wollongong in educational psychology and an MBA from Southern Cross University, both Australian universities.

Strategic planning projects he has undertaken recently relevant to this program include

- **NJ State Library and LibraryLink New Jersey:** State-wide strategic plan
- **NJ State Library:** Strategic plan
- **La Crosse Public Library, Wisconsin:** Strategic Plan
- **Cozby Library and Community Commons, Texas:** Strategic Plan
- **I-86 Corridor, New York Strategic Plan:** A hit-the ground running strategic plan involving two counties, seven municipalities and 70 business and community stakeholders, resulting in 50 projects/programs.
- **State of Vermont:** Economic Development Strategy, facilitation of workshops and developing initiatives and project concepts
- **New Jersey Urban Mayors Association-** Comprehensive Economic Development Strategy for 19 municipalities in New Jersey
- **International Association for Complex Project Management:** Facilitation of roundtables and preparation of issues papers in Europe and the USA.
- **Department of Defense:** Through the Defense Acquisitions University, facilitating strategic planning workshops. Currently designing a leadership program for the Missile Defense Agency.

Jane E. Darling, M.A.
Senior Consultant



Jane envisions a bright future for libraries as trusted organizations at the heart of their communities. Although technology has dramatically changed the ways in which people access information, she believes libraries are perfectly positioned to provide new methods of acquiring knowledge, enhancing skills, and supporting personal enrichment in the communities they serve.

Her experience includes developing comprehensive strategic plans which enable libraries to reach their full potential. Components of a strategic plan may include staff development and leadership, collaboration with community partners, facility and system improvements, and collection building to meet community needs. As a facilitator, mentor, and coach, she helps libraries and librarians discover expanded possibilities, allowing them to set challenging, yet achievable, goals in uncertain and rapidly changing environments. In addition to guiding her library through multiple strategic planning processes and a major building renovation, Jane served as an active member of the 2015-2016 Strategic Planning Task Force of the Texas Library Association.

She holds a Bachelor of Science degree in Business Administration from Montclair State University. While pursuing her original career in the savings and loan industry, Jane earned her Master of Arts in Library and Information Science from the University of South Florida. With her unique combination of business experience and her passion for libraries, she brings a fresh perspective and a commitment to excellence in library service.

Jane is a member of the American Library Association, the Public Library Association, and the Texas Library Association. An enthusiastic supporter of the performing arts, Jane enjoys singing, playing the flute, and ringing handbells. She and her husband live in Ocala, Florida.

Work Plan

Description of the Strategic Planning Process

We propose a process for developing your strategic plan that will result in a rich and informative document, achieved through a series of strategic planning workshops with the board, staff and stakeholders, and a suite of ready-to-implement projects and programs.

We propose the following tasks:

TASK 1: PROJECT KICK-OFF MEETING AND GUIDED TOUR

Upon contract approval, the Maverick & Boutique will hold a face-to-face project initiation meeting with your senior staff and board to review the project's requirements, clarify the roles and responsibilities of all parties, review and finalize a project plan, and exchange existing data, reports and information. This would be part of an initial two day visit to include interviews and data collection, and will also include a short version of the strategic planning workshop (see Task 5) for the strategic planning committee and senior staff to give you an understanding of our approach, as well as kick-start the process.

We will review with you and decide upon an invitation list of the stakeholders who will be invited to participate in the strategic planning process and how best to ensure their involvement in workshops or interviews, especially those who might offer critical information, become project champions or otherwise contribute to the strategic plan. These may include representatives of state, regional and local government, community groups/not for profits such as immigrant, senior citizen and cultural groups, business, colleges and vocational education providers.

On the day of the kick-off meeting, we would appreciate the opportunity to visit a representative sample of the library branches and meet key staff and hear their stories (work and interests) and be given a guided tour of the district to gain first-hand insight into the features and resources of the area in geographic relationship to the library branches.

Deliverables: Meeting notes in electronic form, including an agreed implementation process for the planning activity and preliminary stakeholder list.

Timeframe: April, 2017

TASK 2: INFORMATION GATHERING AND REVIEW

The consultants will review data and other information provided by the Branch District Library as well as reports and other trend data pertaining to the future of libraries and library systems in the United States and internationally. Such materials will include:

- National, Michigan and Branch County population, business, government and community population, quality of life and economic statistics, especially in sectors where you may consider establishing new services or expanding existing service such as workforce development, helping

people to complete high school, new business incubation, support for voter registration and participation, improving literacy and numeracy, offering English as a second language, support for immigrants, and services for seniors.

- Resources such as the Aspen Institute report and others that pertain to the best practices in library management and development.
- Inputs from journal articles, meta-studies and from thought leaders and a range of future scenarios from a variety of sources, recent books on knowledge creation, use/re-use and the future of libraries from a variety of perspectives.
- Trend data on emerging technologies, changes in the roles of libraries, shifts in patterns of knowledge management/knowledge creation, as well as changes in how people live, work and interact.
- The Maverick & Boutique Waves of Change Model: This model was initially developed to help our education, business, government and complex major project clients align strategic thinking and action with emerging social and technological trends (see Appendix 2). The model has proven very useful in our work with libraries by providing a framework for thinking about disruptive change and how it offers present and future opportunities for libraries and librarians to be leaders in the wise application of knowledge.

Deliverable: Briefing notes in electronic form.

Timeframe: April 2017

TASK 3: TARGETED INTERVIEWS

We will conduct a series of 15-20 targeted interviews either in person or by phone with key staff, board members, elected and management township officials, and other stakeholders, to:

- Gain a deeper knowledge of the needs and interests of external stakeholder from opinion leaders in the community (especially civic, community organization and business leaders) as well as senior staff,
- Understand how your library is organized and operated: the organization structure, leadership/management model and coordination approaches, systems and technology, resources, state of collections and proposed collections,
- Test new approaches with key stakeholders and staff, and
- Encourage those external stakeholders interviewed to participate in the strategic planning workshop process, including the project and program development phase, to make suggestions about who else should be involved and/or to use their influence to encourage others to participate.

Approximately one half of the interviews will be held with key library staff or board members, the balance with stakeholders.

Deliverable: Outputs from interviews that will inform the strategic plan.

Timeframe: April-May 2017

TASK 4: SURVEYS

We offer a suite of surveys and assessments to assist us in evaluating your library's current performance, and its' alignment with emerging technologies, systems, structures and processes. All of

these surveys/assessments are ready-to-go, and can be relatively easily implemented with minimal resources, following the initial visit.

These surveys may include:

- **A Review of the Library Alignment with Technological Change** of the library roles, skills, technologies and methods with the stages of social and technological development. This inventory identifies the gap between your current organization structure, strategy, production/delivery methods, roles, procedures, coordination and communications and more optimal arrangements. It is based on our Waves of Change model (see Appendix 2). It identifies large scale productivity opportunities compared to the incremental savings achieved by merely improving current arrangements.
- An **On-line Version of the Strategic Planning Process** for stakeholders who are unable to participate in the strategic planning workshops.
- A **Library as Community Anchor Institution** survey to identify which new services offered by the library, or by partners co-located with the library would be most in demand from your community.
- **New Partners Survey** to start a process working with key community partners (e.g. economic development staff of the city, the chamber of commerce, police and not-for-profits) to survey their members or constituency and identify new collection opportunities and delivery mechanisms.
- A **non-user survey** designed to be made available via a rate or other official notice.

Deliverable: Report on data analysis in electronic form.

Timeframe: May 2017

TASK 5: FACILITATED WORKSHOPS WITH THE STAFF, BOARD AND STAKEHOLDERS

Our approach to the community needs assessment to involve in the process, as many board, staff of the library and stakeholders as possible, to actively co-create the plan. By engaging everyone in this way, we will develop ownership of the plan and gain commitment to its implementation, helping people make the critical shift from “buy-in” to “join-in”.

We will facilitate six or seven (6-7) 3-hour workshops to engage the staff, board, friends, and community stakeholders in the planning process. This approach shifts strategic planning from abstract "strategies" to a focus on **practical projects and program concepts**, which are easier for people to grasp, support and feel energized to implement.

The benefits of this process include the collection of valuable input for the strategic plan and the cross-connection among multiple groups to build enthusiasm and encourage collaboration and partnership between the library and stakeholders, and thus, the creation of new synergies and opportunities.

The six workshops will be conducted over three consecutive days, throughout the county. Each workshop can accommodate approximately 70-80 people, seated in groups of 6-8, with representatives of different sectors/groups at each table to encourage maximum diversity of ideas. To provide a variety of meeting opportunities to suit the availability of different stakeholders, we propose holding the workshops at a range of times, for example from 9AM-noon, 1PM-4PM or from 5:00PM-8:00PM during the two-day window.

All participants contribute their thinking to every step of the process: a review of future trends, analysis of current resources and capacities, identification of stakeholder needs, interests and priorities, and the development of initiatives that include both internal and external short term projects and long-term programs.

Our guided-conversation approach is driven by sequences of rich, open-ended questions that Maverick & Boutique regularly employs with great success. It ensures that participants with diverse interests and points of view cultivate a shared understanding of current reality and desired outcomes, and use this platform to design practical, actionable projects and programs to address challenges and take advantage of opportunities.

We also propose employing an agile, adaptive version of a SWOT (Strengths, Weaknesses, Opportunities and Threats), known as Dynamic SWOT (Keep, Abandon, Invent, Reinvent), because it leads directly to identifying desired outcomes and possible ways forward, rather than identifying the gap and a solution in two or more steps.

Our guided questioning process ask these kinds of questions:

- **The context:** *What’s happening globally, nationally and locally that is or will have an effect on the library, its patrons and stakeholders? Things to think about: who is doing what right now, technology applications, social and generational trends, consumer patterns, etc.?*
- **Envisioning our future:** *Draw a rich picture of a vibrant, successful library the future. What is happening? Who is involved? What are they doing and with whom? How are the different aspects of the system connected and how do they connect to external systems such as other libraries or stakeholders including, business, school, community groups, etc.?*
- **Stakeholder Interests and Priorities:** *Thinking about the changes that are taking place in the world and our region, what are the interests/needs/priorities of the patrons and other stakeholders of our member libraries? How can the library better serve them?*
- **Strategic analysis:** *Thinking about the context and what we want to achieve, what do we want to KEEP that is working well? What isn’t working that we want to ABANDON? What might we INVENT or REINVENT that, if we did, would make a big difference to our success?*
- **Taking action:** *Thinking about what we’ve learned so far, what is a program, project or other initiative we could start today that will contribute to the library becoming more successful, influential and valuable in the community? This will include a catchy title and a 25-word description of the project including desired outcome(s), who is critical to project success, qualitative and quantitative measures, etc.*
- **Working well together:** *Craft a list of 3-5 principles that will guide us in working together successfully. Please phrase each principle in present action language, e.g. “We welcome and integrate diverse ideas and perspectives.”*
- **Vision and Mission:** *Thinking about what we have discussed today, craft a 15-20-word VISION (What we will achieve), a 10-15-word MISSION (How we will achieve it).*

Meeting methodology. For this and other stakeholder engagement sessions, we will use Zing™, a computer-assisted, collaborative meeting process, which we use regularly in our strategic planning efforts. Zing™ offers an innovative way to guide groups through a structured process where everyone contributes

to the strategy plan and has an opportunity to own it, thus creating the momentum necessary for successful implementation.

- This conversation-based methodology integrates small group discussion with large group feedback and reporting and allows ALL participants to quickly and easily bring their perspectives to the issue. Participants are presented a series of questions or issues that they first discuss in small groups and share with the larger group via wireless keyboards. Contributions appear on a screen visible to the room, allowing ideas to flow synergistically between participants. All ideas are acknowledged and, in a final and critical step, participants are guided in integrating their ideas to create a more robust understanding of the situation and to produce outcomes such as a plans or project concepts. For more info visit: <http://maverickandboutique.com/about-zing/>. Abby Straus, of Maverick & Boutique, can be seen jointly facilitating a session for 200 social entrepreneurs to discuss leadership in social innovation at the link here: <http://livestre.am/16KFq>



Library Strategic Planning Workshop, La Crosse, Wisconsin

Deliverable: A transcript of the workshop and notes organized as appropriate for further work and discussion.

Timeframe: May 2017

TASK 6: SYNTHESIZE WORKSHOP OUTPUTS INTO 6-7 STRATEGIC GOAL AREAS

The workshop outputs – primarily the 30-50 project/initiative concepts – will be consolidated by the consultants into a set of 6-7 themes or strategic goal areas that will feed directly into the strategic plan and guide the creation of action items. The scope of each priority area will be determined from a review of the outputs from the all the workshop sessions, interviews, and targeted contributions.

The goal areas are likely to include variations on these aspects:

1. Leadership, staffing and professional development
2. Marketing, stakeholder outreach, communicating the value of libraries

3. Technology, systems and future infrastructure needs
4. Programming and events
5. Services innovation and collection building
6. Governance, coordination and resource sharing
7. Expanding the role of the library and partnering
8. Funding, financial health, capital investments, budgeting

We will also add project or program concepts identified during the interview and research tasks.

Deliverable: Recommendations for the 6-7 goal areas and a consolidated list of 5-6 potential projects and programs for each goal area.

Timeframe: June 2017

TASK 7: PROJECT AND PROGRAM DESIGN

The consultants will conduct a half-day workshop where the staff, board and stakeholders will join work groups for each of the 6-7 goal areas to develop detailed projects and programs. There will be two 2-hour sessions, from 11am-1pm and 2pm-4pm; each session will address 3-4 goal areas. Participants will self-assign to the goal areas in which they have the most interest. This activity is part of a two-day visit, the second day being Task 8, the Deep Dive Workshop.

Each group will develop 2-3 detailed project plans using the following template:

- **Project Description:** Detailed description of a proposal for solving the problem/issue (50-200 words).
- **Governance:** Roles and responsibilities, who will own the project?
- **Objectives:** What will the project achieve?
- **Stakeholders:** Which stakeholders and their interests will be served by the project? Who will make use of the product/service/program and how? Who will be the suppliers?
- **Time frame(s)** for development, implementation, etc.
- **Estimated cost range and sources of funding:** How much will the project cost and where could we obtain funding, e.g. grants, fund raising?
- **Actions/activities:** List the actions that will be taken to get started, 1..., 2..., 3..., etc. including what will be done, who will be responsible, by when.
- **Measures of success:** What will be the outcomes and how will they be measured? (benefits, measurable, clear, simple, actionable)
- **Professional development:** What new skills will we required and how will they be acquired?
- **Resources, technological or facilities requirements:** What equipment, systems, buildings, etc. will be needed for this project?
- **Integration with other projects/programs:** How could the project integrate with existing or new programs?

The consultants will set the process up on Google Docs or Survey Monkey so that work group participants can simply log-on and contribute to the document during the session, or if they are unable to attend, be able to contribute a project plan asynchronously.

The projects/programs will be consolidated into a single report and made available overnight to participants in the Deep Dive Workshop the next day attended by the strategic planning committee and senior staff (see Task 8).

Deliverables: 16-24 fully scoped projects and programs, approximately 2-3 in each key focus area.

Timing: June 2017

TASK 8: DEEP DIVE WORKSHOP

Before the consultants begin the task of drafting the plan, we will facilitate a Deep Dive workshop for the board and senior staff to make sense of the data, assess the library's capacity to implement the new or revised proposals and integrate the multiple aspects of the plan into a cohesive whole. This workshop is part of a two-day visit.

All of the interview, research, workshop, and programs/projects designs will be consolidated into a single document and used as pre-reading inputs to a deep dive workshop, at which we will develop goal and strategy statements.

The half-day workshop will be in two parts:

- **Discuss the Issues and Develop Solutions:** A 2-hour session to discuss the main issues revealed by the strategic planning process and develop or refine potential solutions, and to identify which projects/programs are highest priority (1-3 years focus) and longer term (3-5 years).
- **Craft Strategies for the Goal Area:** A 2-hour session to craft goal statements and 4-5 strategies for each goal area that describe the major thrust of the projects and programs that have been developed, and which also deal with the operational issues.

For the **Discuss the Issues and Develop Solutions** session we will ask the following kinds of questions to guide the discussion:

- ***The value of libraries/our library:*** *How is the value of libraries perceived and by whom? How are they perceived as entities that embrace the future? If not, how might we change that? What value/perceived value might we add so that our library becomes better known as a great resource to fund and support?*
- ***Our changing role:*** *What role does the library currently play in community at the moment? What is our role as the library and librarians in a world that is ever more complex, and where many more people are involved in the creation, dissemination, remixing, categorization and publishing of works (film, books, research, learning resources etc.)?*
- ***Governance, leadership and influence:*** *How can the library play a leadership role in our community? How can we make better use of what we know about knowledge management, knowledge creation and the wise application of knowledge? What are the gaps in society/business where we can make a difference or be influential?*
- ***Structures and processes:*** *How might we structure/organize and co-ordinate our activities so that we integrate the interests of our stakeholders and their communities, customers or stakeholders? How might we apply economies of scale to take advantage of resources? What activities require local/custom/just-in-time services and how might we best deliver these?*
- ***Collections:*** *How will our future collections be different to what we have developed in the past? What collections, other than books can we curate for the benefit of our community, e.g. tools, equipment? What collections are vital to keep/refresh?*

- **Professional development:** *What new skills/capacities will our librarians and other staff need and what old skills do we want to maintain or further develop in order to perform our new role(s)?*
- **Resources, technologies and methods:** *What kinds of equipment, processes and methods will we need to put in place that is virtual, physical or a combination of both? How effective are our current systems?*
- **System requirements:** *What are the security requirements? Remote access requirements? Legal requirements? How do the patrons engage with the technology, for what purpose?*
- **Technology Infrastructure:** *How well do the current systems, hardware and software packages fit the needs of the library?*
- **Sources of funding:** *How are our current work/systems funded, e.g. normal revenue, grants? How will our work/systems be funded in the future? What new sources of funding might we tap, expand on existing sources, or manage differently?*
- **Our brand/identity:** *How will our citizens regard libraries and librarians in the mid-21st Century? What will the library be known for/ recognized/valued? How will we help people, where are they located? How will we interact with our community?*
- **Community needs:** *Thinking about the emerging role of librarians and the roles that libraries/librarians in other places are introducing, which of the services (refer to M&B inventory of new roles for libraries, and Aspen Report) would be of value to our community, and what capacities to we have or would need to deliver them?*
- **Competition/potential partners:** *Who are the competitors/potential partners for libraries, for funds and services? Where do we compete where we can't be successful? How and where might we compete/collaborate where we have a strategic advantage? How might we collaborate with competitors to offer higher overall value?*

Deliverable: Goal statements and strategies for each of the 6-7 priority areas.

Timeframe: June 2017

TASK 9: DEVELOPMENT OF HIGH IMPACT MEASURES

M&B will help the library design ways to measure the impact of the strategic plan and monitor the implementation process.

When developing measures of success, it is important to keep in mind both strategic and tactical perspectives. In other words, it is possible to achieve specific input and output goals, such as reduced costs and more library cards issued without realizing the essential strategic goal of facilitating positive outcomes for the community. It is therefore necessary to look both within the organization and outward into the community system of which the library is a part for indicators of success.

The set of measures will take into account both quantitative data, such as community statistics and library performance data and qualitative data, such as the adequacy and rapidity of responses to community surveys, observations about the well-being of library staff, how well the library is able to adapt to changing trends and circumstances, etc.

This activity is an iterative crafting process, where the measures and goals are honed to the point where they are:

- **Clear** and simple enough to send a powerful message for what is to be achieved;
- **Flexible** enough to allow for organization learning,

- Sufficiently **challenging** in order to encourage ongoing innovation and the development of adaptive capacity in the face of the unexpected; but also
- **Contagious**, so they are rapidly accepted and widely adopted.
- **Able to adapt** to new circumstances as well as inform new strategies/measures to achieve better alignment with emerging technologies and evolving community expectations.

Deliverable: A set of high leverage impact measures for each goal area and project or program.

Timeframe: July 2017

TASK 10: DRAFT THE STRATEGIC PLAN

The consultants will integrate all workshop outputs, meeting notes and draft plans into a comprehensive strategic planning document, which will be formatted to give the final product a clean, professional look.

The plan will have the following content.

- **Executive Summary:** *The priorities, how they were determined and suggestions for how members can use or align with the plan, and/or use its processes for their own benefit.*
- **Environmental Scan:** *The major trends and emerging issues.*
- **Preferred future: Refreshed vision, mission and values/principles statements** – *What is happening in and around the library when we have achieved our goal of providing value and facilitating the highest outcomes for our community? How might we best align with the emerging future, or take an active role in creating it? What values or principles will we choose to guide us on the journey?*
- **Stakeholder Interests/Needs Matrix:** *This is a matrix of stakeholders and their interests, and how their interests/needs might be served by the library and vice versa.*
- **Dynamic SWOT analysis:** *What activities should we keep? What should we abandon? What should we invent or reinvent?*
- **Goals and Strategies:** *A list of 6-7 goals and the 4-5 high-level strategies to achieve each goal*
- **Projects/Programs:** *An action matrix of projects or programs to implement the strategies defined in the plan. An appendix of detailed project and program descriptions as generated by participants will be included.*
- **Phased Implementation Plan:** *Time line of activities to be undertaken and the resources and budget required, including year-by-year targets for the next five years, including short term (1-3 years) and longer term (3-5 years).*
- **Impact Measures:** *Indicators/measures of success for each goal, strategy, project/program*

This document will be prepared in up to three formats:

- a) **An Executive Summary,**
- b) **Extended Strategic Plan Document in Word and PDF,** ready to email or print.
- c) **Slide Presentation,** outlining the key elements of the plan, so it can be presented to staff and stakeholders as and when required.

We will also provide the library with a set of documents used in the preparation of the report including survey results, workshop transcripts, interview highlights, drawings, evaluations, statistics and reports,

Deliverables: A draft strategic plan ready for publication in Word and PDF formats, a slide show and the set of documents used to develop the plan.

Timeframe: July 2017

TASK 11: REVIEW THE PLAN

An on-line workshop will be held with the strategic planning committee and senior staff to review the final plan. The plan will be circulated in advance of the meeting in a form ready for printing. Using the following question, participants will be asked to identify any specific opportunities for enhancements and/or make minor adjustments in emphasis where required:

What do we LIKE about the plan, what could be IMPROVED, and how would we CONTRIBUTE or HELP to make it happen?

The consultants will then make additional changes as necessary to the plan to reflect the suggestions by participants. If you wish, the consultants will make a further final presentation to the strategic planning committee, but in our experience, such an additional step is unnecessary.

Deliverables: The consultants will provide the Library with camera-ready, electronic files of the final plan and all outputs and reports resulting from this project. The layout will be a simple format, with color images employed as section banner headers for each section based on photographs supplied by the library as well as up to one additional image per section.

Timeframe: Early August 2017

TASK 12: PRESENT THE PLAN TO THE BOARD

When the plan is complete, the consultants will present the plan to the board.

Deliverables: Presentation of the plan.

Timeframe: August 2017

Invitations to events: It is important that the invitations be issued under the imprimatur of the library rather than by the consultant, so that the workshops are seen as having an official status and value to the participants and will return the highest value as well.

Marketing events: We foresee using a variety of media to produce invitations and marketing materials for these events including letters of invitation, print, personal communications, web and social media. The consultants will assist in the marketing plan and copy for these materials.

Event locations: The consultants will provide direction and specifications as necessary to help the library choose and set up the best environment for workshops. The consultants will provide all aspects of the Zing tool, including wireless keyboards and laptop computer. The Library will provide the venue as well appropriate AV equipment set up to the consultants' specifications.

Handouts and other materials for events: The consultant will supply print-ready files for all handouts and notes produced by them. The library will be responsible for providing the printed documents and any other materials such as flip charts, markers, etc.

Surveys: The library will be responsible for implementing survey questions on their website and social media.

PROJECT MANAGEMENT

To facilitate the coordination of our work together, we ask that you designate a specific member of your staff to serve as the project management contact. Abby Straus or John Findlay of Maverick & Boutique will serve as project manager, and will conduct phone or Skype conference calls with the library project management contact(s) on an agreed-upon schedule to discuss the status of tasks, findings and other project matters.

These meetings help to ensure that the project is completed on time and to the satisfaction of the client. Any and all staff or other stakeholders are welcome to join the calls as needed, but it is principally a coordination effort between our project manager and your representative.

References

The following references for recently completed or current projects are pleased to speak for our work in libraries and in strategic planning.

1. Greg Pronevitz, Executive Director, Massachusetts Library System

Address: 225 Cedar Hill Street, Suite 229, Marlborough, MA 01752

Tel: 508-357-2121 x 303

Email: [REDACTED]

Project: State-wide Strategic Plan for the Massachusetts Library System

2. Vicki Chiavetta, Director, Coppell Public Library

500 Southwestern Blvd

Coppell, TX 75019

Phone: 972-304-3655

Email: [REDACTED]

Date of service: 2016

Project: Strategic plan for the Coppell Public Library

3. Barbara George Johnson, Executive Director, the John S. Watson Institute for Public Policy at Thomas Edison State College

Address: 101 West State Street, Trenton, NJ 08608-1176

Tel: (609) 777-4351 X 3213

Email: [REDACTED]

Date of service: 2013-2015

Project: Comprehensive Economic Development Strategy (CEDS) for 19 Urban Municipalities in North Central NJ

4. Kelly Krieg-Sigman, Director, La Crosse Public Library

Address: 800 Main Street, La Crosse, WI, 54601

Tel: ((608) 789-7123

Email: [REDACTED]

Date of service: 2016

Project: Strategic Plan for the La Crosse Public Library

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Cost Proposal

We are able to provide the strategic planning service to the Branch District Library for a fixed price of \$41,600 including travel.

Phase 1: Data Collection and Analysis

Task	Timing	Description	Fees	Travel	Total
1	April	Kick-off meeting and guided tour	\$1,500	\$1,350	\$2,850
2	April	Information gathering and review, background notes	\$3,000		\$3,000
3	April-May	Targeted interviews with 16-20 staff, board and stakeholders	\$3,000		\$3,000
4	May	4 x On-line Surveys and one organization assessment	\$3,750		\$3,750
Total Phase 1			\$11,250	\$1,350	\$12,600

Phase 2: Community Needs Assessment

Task	Timing	Description	Fees	Travel	Total
5	May	6-7 x board, staff and stakeholders workshop, 2 consultants	\$6,000	\$2,350	\$8,350
6	June	Synthesize data into 6-7 goal areas and develop project concept listing	\$1,500		\$1,250
7	June	Project & program development Workshop for project and program plans, prep and post	\$2,500		\$2,500
8	June	Deep Dive Workshop to synthesize goals, strategies and integrate with internal capacities/resources	\$2,500	\$1,300	\$5,800
Total Phase 2			\$12,000	\$3,650	\$15,650

Task	Timing	Description	Fees	Travel	Total
9	July	Development of high impact strategic measures	\$2,250		\$2,250
10	July	Writing/editing 3 versions of the strategic plan – executive summary, full plan and slide show.	\$7,000		\$7,000
11	August	On-line review of the plan	\$1,500		\$1,500
12	August	Present the plan to the board/staff	\$1,500	\$1,100	\$2,600
		Total Phase 3	\$12,250	\$1,100	\$13,350

Total of Phases 1, 2 and 3

Phase	Description	Fees	Travel	Total
1	Data collection and analysis	\$11,250	\$1,350	\$12,600
2	Community needs assessment	\$12,000	\$3,650	\$15,650
3	Strategic Planning document	\$12,250	\$1,100	\$13,350
	Total	\$35,500	\$6,100	\$41,600

Travel

The travel budget is priced on the following assumptions:

Task 1, 2 and 3: Flight for 1 consultant to Detroit, MI, \$600, rental car for four days, \$300, accommodation for three nights \$450; Total: \$1,350

Task 5: Flight for 2 consultants to Detroit, MI, \$600 x 2, rental car for three days, \$250, accommodation for three nights \$450 x 2, Total: \$2,350

Task 7 and 8: Flight for 1 consultant to Detroit, MI, \$600, rental car for three days, \$250, accommodation for three nights, \$450, Total: \$1,300

Task 12: Flight for 1 consultant to Detroit, MI, \$600, rental car for two days, \$200, accommodation for two nights \$300. Total: \$1,100

Appendix 1: Inventory of Future Roles for Libraries

As our world becomes more complex and change continues to accelerate, we face a critical challenge: engaging our technology *and* our humanity in a way that produces vibrant, self-sustaining local communities. Communities that offer abundant opportunity and support for the social and economic well-being of our citizens. Communities that engage our citizens to productively address the challenges we encounter and create the lives we want to live.

While we are increasingly connected through high-tech interaction, where we gather virtually around topics of interest rather than place, people are also gravitating increasingly toward high-touch, physically based community life. They are moving back to (or staying in) urban areas, preferring walkable, convivial environments where they are choosing both to live and work.

The Library at the Center of a Vibrant Community

Partnering with multiple organizations/entities to facilitate community development and growth

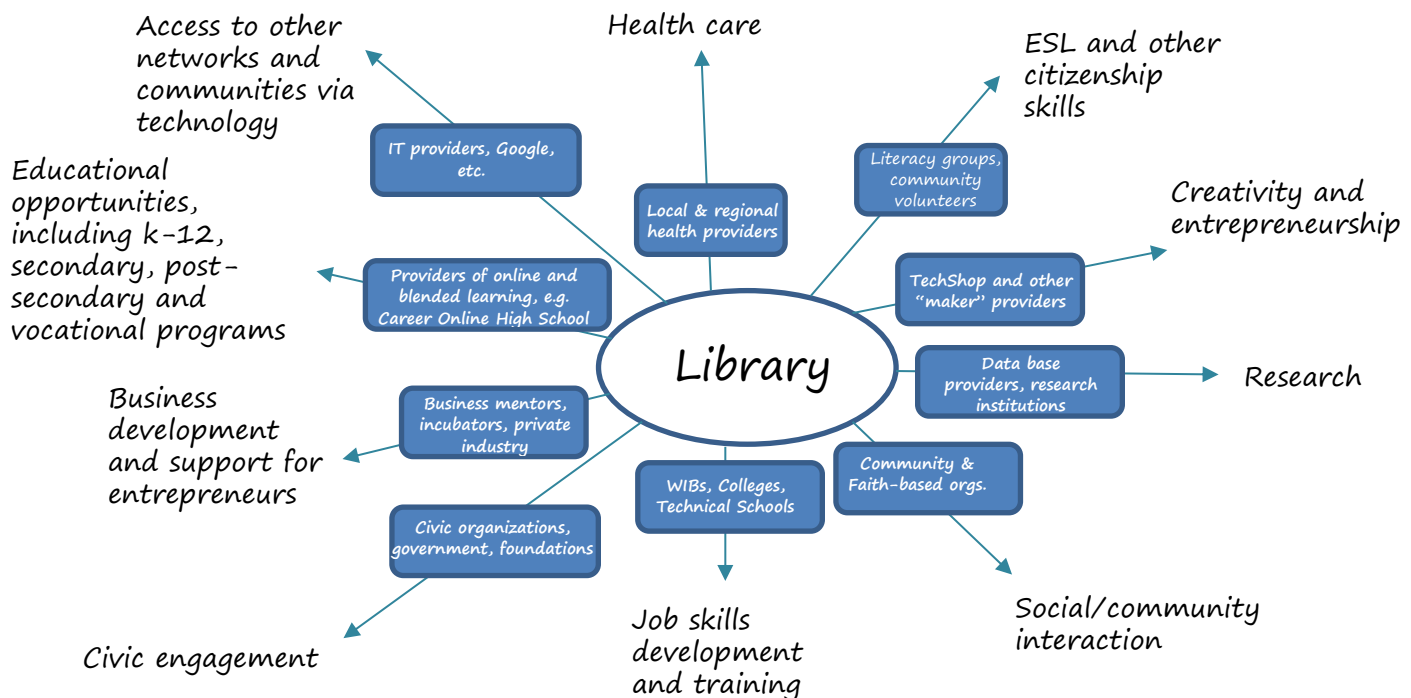


Figure 2: An example of various partnerships and the activities/outcomes they might achieve for participating communities.

At the same time, many urban centers are experiencing profound challenges. These include increasing disparities in access to wealth and the skills to produce it, the lack of digital inclusion, lack of access to (and understanding of) healthy food, low numeric and consumer literacy and low civic participation and pride, all of which are preventing many communities from realizing their visions of vibrancy and well-being.

How might we organize—or re-organize—ourselves to achieve our goals for our communities in the most efficient and effective ways? Which institutions are well-situated to help us create our desired futures? How might we take advantage of our existing assets and combine them with new opportunities and emerging trends?

We believe that public libraries are perfectly suited to the task of creating and/or enhancing vibrant communities. In its 2014 report, *Rising to the Challenge: Re-Envisioning Public Libraries*, the Aspen Institute Communication and Society Program sites the public library as “a key partner in sustaining the educational, economic and civic health of the community during a time of dramatic change.”⁴ The report offers a vision of the library as a “central hub for learning and community connections” supported by a robust network of virtual resources and connections that address the needs and aspirations of citizens of all ages and abilities.

The library is the go-to place for the local community to obtain, experiment with, create and wisely apply new knowledge. It is the anchor and key convener in a community center that provides citizens with places to gather, learn, collaborate and tend to a full spectrum of needs. As immigration and population trends continue to shift, the library becomes ever more valuable as a non-threatening, welcoming place to all, regardless of citizenship status.

This is a compelling vision, one that is taking shape in the minds—and the communities--of many people around the world. We are proposing to take this vision and try it out on the ground in urban New Jersey. In real communities. With real people. Working with real assets and real problems. *To get real results.*

The functions that in the future will partner with libraries include:

After school activities center: The Free Library of Philadelphia's provides a free drop-in after school program every weekday afternoon at 53 libraries and serves 85,000 school children and teens. Each team comprises an adult staff member and three teen leadership assistants. A quarter of the leadership assistants are funded by a welfare to work program, live in poverty or are in the juvenile justice system. The All Stars Talent Show Network in Newark New Jersey, which is adjacent to the Newark Public Library offers an after school, performance-based enrichment program for 1,000 inner-city youth, 42 per cent of whom live in poverty. The All Stars events include auditions, rehearsals, talent shows and performance workshops.

Agriculture: The Northern Onondaga Public Library in Cicero, New York has developed a library farm where around 30 people and families farm 50 plots. People cultivate plots on one side of the land with no commitment; the harvest from the other half is a “community garden” that is donated to local food pantries. In Arlington, Virginia the public library system collaborates with the Master Gardeners of Northern Virginia at a community teaching garden. In St. Helena, California, in the Napa Valley, the public library planted a vineyard which will be mature enough in a decade to make wine, and will help support the branch.

⁴ Aspen Institute Dialogue on Public Libraries, *Rising to the Challenge: Re-Envisioning Public Libraries*, Washington, D.C.: The Aspen Institute, October 2014, p. IX

Apartments: Libraries with multi-floor apartments have opened in Milwaukee and two complexes are planned for Brooklyn, New York. The model is public-private partnerships to drive traffic for the library and provide modern facilities for the library.

Arts and Crafts: The Octavia Fellin Public Library in Gallup, New Mexico, partnered with the Chamber of Commerce, Small Business Association and the University of New Mexico to offer job training and develop marketing skills via makerspace workshops on Native American arts and crafts, including weaving, soap making, quilting, candle making, aromatherapy, knitting, card making, and silversmithing.

Bookstores: Some libraries have bookstores; most also sell books.

Citizen Engagement: Staff and citizen training to facilitate community-wide discussion and create a “think-tank” model to engage in problem-solving on local issues, or to develop a community environment of civil discourse and engagement. One program that is being used in libraries in other states to “activate communities” is from the Harwood Institute: <http://www.theharwoodinstitute.org/>

Community incubator and collaboration spaces: The Chattanooga, Tennessee library, cleared out its 14,000 square feet former storage space and converted it to a community collaboration space. It is space for starting projects or launching a business. It has 3-D printers, laser cutters, spaces for conducting business meetings, offers computer coding classes and has advanced video and audio production facilities.

Community services: Alachua County Library District in Gainesville Florida, provides access to social services, basic health services and legal advice.

Digital publishing and on-demand printing/publishing: For example, the Martin Luther King Jr. Memorial Library in Washington, D.C. has a digital commons with an on-demand book binding machine to publish books as required.

Emergency and crisis management: Some libraries have acquired portable generators and operate as an island in the storm during emergencies.

Film production, recording and broadcast studio facilities: The Yellowstone Public Radio (KEMC) broadcasts live from a recording booth at the Bozeman Public Library in Montana.

Hydroponics: At the Queens Library in New York, local residents learn how to create and maintain hydroponic gardens to grow their own vegetables. As commercial size hydroponics facilities are established in urban areas to supply fresh vegetables, especially in “food deserts,” demand for co-located facilities, such as public access kitchens/production facilities, is growing to teach people how to prepare fresh, healthy food.

Library Express: The new Transportation Center at Storrs Downtown, the near heart of the University of Connecticut including a mini-library, conveniently located at a high-traffic location.

Mixed use development: The AT&T Bell Labs site in Monmouth County, New Jersey, is being redeveloped by Somerset Development Corp, for \$27 million. The redevelopment project includes a health and wellness center, skilled nursing facility, assisted living center, a hotel, restaurants and shopping, spa, office spaces and a 20,000-square-foot public library. Recreation space and luxury homes are planned for the surrounding land. See www.app.com/story/news/local/red-bank-middle-town-area/holmdel/2014/08/01/bell-labs-holmdel-monmouth-county/13473171/

Offices/training rooms: for local learning facilitator/coach/trainer licensed/supporting colleges/universities

One-stop shop for government services: A single place to go to get personal service for local, state and federal government, post office, banking, and micro loans. In Cornwall, United Kingdom, the local government saved 170 million pounds over four years by setting up a one-stop shop through 11 local libraries.

Professional offices: Public health nurse, doctor, lawyer, dentist, counselor, and foundations.

Public access manufacturing: The Chicago Public Library provides patrons with an introduction to new forms of personal manufacturing and business opportunities, including 3D printers, laser cutters, a milling machine, and a vinyl cutter.

Public market/flea market: The Carnegie Library of Pittsburgh has opened a “library without walls” in the Pittsburgh Public Market to deliver library services on the weekends where many people do their shopping.

Restaurants and cafes: Many libraries now have cafes or coffee shops, such as the Terra Libri Café at the Princeton Library in New Jersey.

Retail space for community necessities: Drug stores, laundromats, food trucks

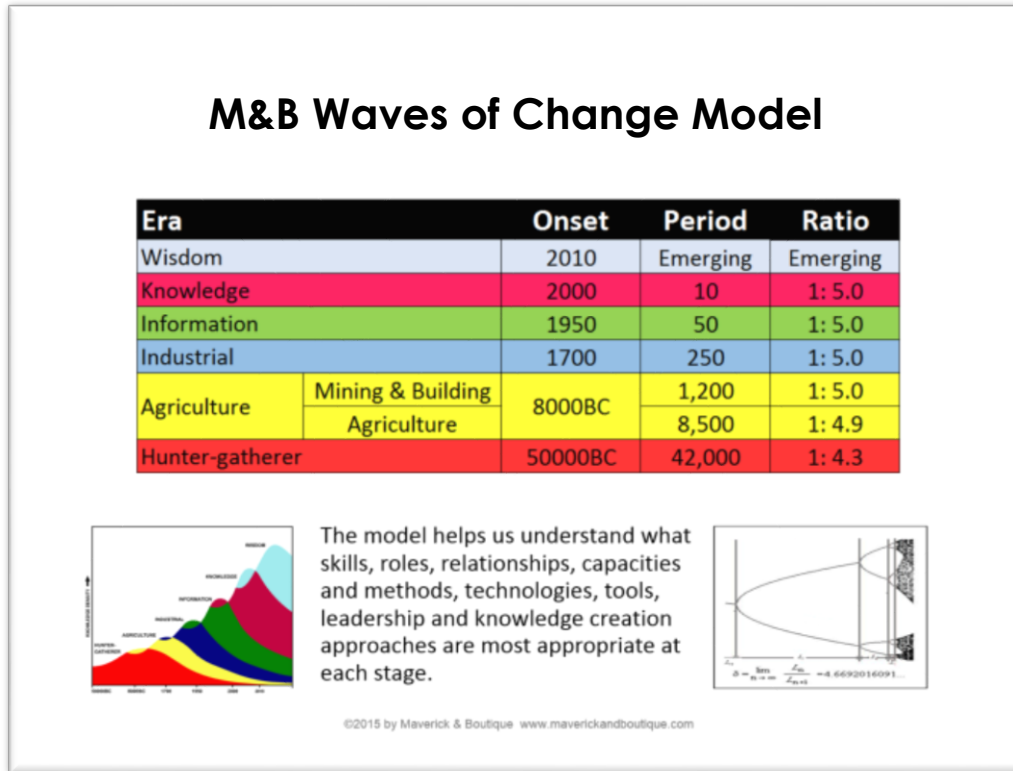
Retirement living and services: As the proportion of the population living beyond the retirement age expands, services and amenities will be needed in close proximity to where people live. Many retirees are seeking living spaces where there are numerous amenities within walking distances, such as centralized community centers, fitness centers, a pool, hobby shops and movie theaters that are close to churches, shopping, restaurants and libraries. Many libraries provide large print and audio books, health information, advice/information of caring for a partner, home delivery, courses and events.

Small business office space and services: Meeting rooms and working spaces for small business and social entrepreneurs, Internet access, computers and software programs. Another idea is to provide working and meeting space to traveling business people on an hourly fee basis.

Storefronts for personal services: Hairdresser, laundry, manicurists, child care

Appendix 2: Technological change, learning and knowledge creation

Maverick & Boutique has created a model of social and technological change, based on research and the science of complex systems that is broadly predictive of emergent technologies, work/job activities and roles, organization, group and inter-group structures, as well as leadership, co-ordination models and social system dynamics.



We use this model to help our clients understand where their systems, methods, structures, activities and attitudes fit with the unfolding trends and how they might upgrade their “operating systems” to be better aligned with their preferred futures.

The model demonstrates a reliable pattern in the development of human social and technological systems. Each era is one fifth shorter than the one before, by a factor from complexity theory. The technologies of the new era automate the work of the previous era, including further rounds of automation of the work of earlier eras which was previously automated by new technologies.

A key focus of our model is how knowledge is created, acquired, transmitted, replicated, applied and repurposed and the tools and interaction systems we use to do this.

The most recent three eras have these features:

Factor	Information Age (1950-2000)	Knowledge Age (2000-2010)	Wisdom Age (2010-)
Metaphor	Computer	Network	Ecology (complex adaptive system)
Technologies	Software including spreadsheets and word processors, fax machines, television, mobile phones, photocopiers	Internet, I-phone, voice response systems, expert systems, automatic trading, software as a service, CRM, data mining, knowledge management, mesh services e.g. Zip cars	Nanotechnology, software systems that learn from users, biomimicry, advanced energy, tools for expanding consciousness and relationships
Productivity gains	Automates routine cognitive work e.g. clerical, secretarial, numerical	Automates knowledge and relationships work, e.g. professionals, middle managers, travel agents, bank clerks	Automates governance, judicial, leadership and wise expert work
Rate of change	Transformational change in 2-3 generations	Transformational change in one generations	Transformational change in less than a generation
Knowledge use	Knowledge reproduction e.g. on-line learning, essays	Knowledge creation and management by many	The wise application of knowledge by many
Roles	Team leader-team member, trainer-trainee, supplier-customer	Servant leader, facilitator-, contributor, co-creator	Prod-users, orchestrator-interactor, challenger-designer, researcher-learner
Production methods	Local customization of mass production, factory designed choices	Customized by the user, customer involved in design and delivery	Agile, adaptive, high value-add experiences, systems that anticipate your needs
Communication	Informal discussion, debate	Dialogue, sense-making	Ethical-dialectical, integrative win-win-win

The model has critical importance for libraries and librarians, to more deeply understand the vital role they have to play in the future development of society, in which the wise application of knowledge becomes the main goal of the system. The roles for librarians are:

- **Honest brokers** between a rapidly expanding number of disciplines, each with its own specialist language, ways of seeing the world, and growing distrust of other models/frameworks
- **Validators** of knowledge of vital importance to communities and organizations who wish to make good decisions
- **Facilitators** of crucial conversations between a diverse range of interests, particularly in community decision making and planning, policy making, and implementation
- **Curators** of new and ever more diverse collections, including tools, methods, processes, systems and talents.
- **Mentors**, so curation, categorizing and research become skills that everyone routinely uses.
- **Trusted partners**, helping people and their organizations build the capacity for the wise application of knowledge, so they become much more than “learning organizations”.
- **Conveners** for meetings, events, exhibits, safer refuge in emergencies, making and designing.

Appendix 3: Sample Strategic Plans

1. Library Link New Jersey Strategic Plan: There are three versions of the strategic plan which may be retrieved from:

A 24-page executive summary:

<http://librarylinknj.org/sites/default/files/pdfs/StatewideStrategicPlanMasterExecutiveSummary.pdf>

A 142-page plan, including 33 well-developed project plans

<http://librarylinknj.org/sites/default/files/pdfs/StatewideStrategicPlanMaster.pdf>

A 4-page plan overview:

<http://librarylinknj.org/sites/default/files/pdfs/CreatingOurFuture.pdf>

2. La Crosse Public Library Strategic Plan: The consultants produced a formal plan and slide show. The formal plan can be viewed at:

<http://www.lacrosselibrary.org/sites/default/files/FINAL%20La%20Crosse%20Public%20Library%20Strategic%20Plan%20FINAL%20No%20Page%20Numbers.pdf>

3. Massachusetts Library System strategic plan, all on-line and connected to current and emerging activities:

<http://guides.masslibsystem.org/mls-strategicplan-2017/overview>

4. New Jersey State Library, a plan created by staff using a process facilitated by the consultants, so there is a high level of ownership of the plan:

<http://www.njstatelib.org/wp-content/uploads/2014/05/adaptiveplanningjuly2016final.pdf>

5. State of Vermont Economic Development Strategic Plan: The outputs from the eight workshops conducted throughout the state using a process similar to that proposed for your project:

<http://accd.vermont.gov/sites/accd/files/Documents/business/CEDS/VT%20CEDS%20Regional%20Meeting%20Notes.pdf>

6. Comprehensive Economic Development Strategy (CEDS) for 19 New Jersey Municipalities: A 173-page document including regional and local strategies:

<http://www.tesu.edu/watson/institute/documents/CEDS-FINAL-September-2015.pdf>



Linda Lyshol [REDACTED]

Maverick & Boutique

Barbara George Johnson [REDACTED]

Tue, Mar 21, 2017 at 3:33 PM

To: Linda Lyshol [REDACTED]

Good afternoon Linda,

Maverick& Boutique was an integral part of our strategic team when we worked on an economic development plan for urban communities in New Jersey. Maverick's expertise in engaging a cross section of stakeholders was superior to our experience with other facilitators. Their patented Zing process truly created increased creative thinking and engagement at our stakeholder and community meetings. They were extremely professional and we continue to engage them whenever possible.

I highly recommend them. Much success in your endeavors.

Barbara G. Johnson

Sent from my iPhone

[Quoted text hidden]



Linda Lyshol [REDACTED]

Maverick & Boutique

Gregory Pronevitz [REDACTED]

Wed, Mar 22, 2017 at 12:32 PM

To: Linda [REDACTED]

Hi Linda,

We were pleased with the work Abby Straus did for us with Maverick & Boutique.

I would recommend her highly as a planning consultant.

She had excellent results in gathering input from our stakeholders and encouraging the Committee and others to be involved.

She delivered everything we agreed on.

She had good insight into analysis and evaluation of input.

She provided a nice draft plan that allowed us to use to design our three-year plan.

We decided to make it much shorter than the the draft.

Feel free to call or email if you have additional questions.

Good luck!

Greg

Greg Pronevitz, Executive Director
Massachusetts Library System
Stronger Together

[508-357-2121](tel:508-357-2121) x303[866-627-7228](tel:866-627-7228) x303 (Mass. only)www.masslibsystem.org

From: Linda Lyshol [REDACTED]**Date:** Tuesday, March 21, 2017 at 11:38 AM**To:** Greg Pronevitz [REDACTED]**Subject:** Maverick & Boutique

[Quoted text hidden]



Linda Lyshol [REDACTED]

Maverick & Boutique

Vicki Chiavetta [REDACTED] >

Tue, Mar 28, 2017 at 7:06 PM

To: Linda [REDACTED]

Linda,

I greatly apologize for the delay in responding to your email.

What I liked about Maverick and Boutique was the process they used to generate discussion and feedback. It consists of using keyboards to capture everyone's ideas and suggestions in a format that is instantly seen by all. This helped spark other ideas from our committee and was extremely useful in getting the group to focus on priorities.

The other thing about this group that was appealing to us was that they approach strategic planning in a very different manner than consultants we have used in the past. They are much bigger picture, tying in library services with what a community wants and needs to be successful; workforce development, community partnerships, civic engagement and so much more. They look beyond library walls to try to discover how the library can embed itself and meet needs that may not be readily apparent. They also like to engage as many stakeholders as possible in their process to ensure that the movers and shakers understand how a library can help the city, other organizations and even school districts reach their goals.

The only thing we had to rein them in on was doing too many different surveys. Be specific about who you want to survey and what about. We started out talking about 4 different target audiences to survey which I felt was too much, but narrowed it down to 2.

I really enjoyed working with John and Abby. John was our primary consultant on this project. I would use them again for strategic planning. We now have a plan that will serve us well for the next three years, which was our goal.

If you have further questions, I will be happy to serve.

Vicki



Victoria A. Chiavetta

Director of Library Services

Cozby Library and Community Commons
City of Coppell, TX

972-304-7030 (office)

www.coppelltx.gov

From: Linda Lyshol [REDACTED]

Sent: Tuesday, March 21, 2017 10:39 AM

To: Vicki Chiavetta [REDACTED]

Subject: Maverick & Boutique

[Quoted text hidden]