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The Public Library Board of Trustees and Friends of the Library Board held a joint retreat at the library on Month DAY, 202--. Consultant Rachel Arndt facilitated small group activities and discussions for the Library Board and Library Friends Board. Utilizing a SOAR framework, the consultant provided a variety of prompts to engage participants in substantial dialogue to reflect on the previous strategic plan and generate ideas for the next strategic plan. The retreat structure was cumulative; small groups were encouraged to prioritize and build upon their ideas. Small groups recorded their own feedback and ideas. All groups provided report-backs to the large group throughout the retreat. The consultant recorded all large group feedback.

The notes in this debrief document and the category headings were created by the consultant. These ideas represent aggregate feedback, and some concepts may have been re-worded for clarity. The raw notes from the retreat have been provided to Public Library leadership. In each category, concepts are presented in alphabetical order and no priority is implied.

Strategic Areas of Focus

Participants reviewed the six strategic areas of focus from the current Strategic Road Map (2020-2025). Individuals shared their perceptions about what has been successful over the plan's lifespan. All ideas were welcomed and participants were encouraged to up-vote others' ideas.

1) **Community Partnerships**
    - Bookmobile
    - Library is a strong partner to the community
        i. Open application to collaborate with the library
    - Literacy Network classes
    - WayForward panels
2) **Civic Engagement**
    - Covid-19 strategy and communications
    - Engaged community & business partners for bookmobile campaign
    - Proclamations read at City Council for library-related commemorations
    - Voter registration
3) **Inclusion & Belonging**
    - Bookmobile expands reach of library services
    - Employee retention and advancement
    - Engaging teen patrons
    - English language classes
    - Improvements to library recruitment and hiring
    - Internal promotions (12+ since 2021)
    - Multiple languages overheard in library
    - Programs reaching diverse audiences
    - Virtual author visits

Strategic Areas of Focus (con't)

4) **Place & Space**
    - Art gallery space
    - Bookmobile
    - Homework handouts
    - Infant, children's spaces
    - More library space for public use
    - Bookseller remodel, flexible spaces
    - Reinvigorating Community Campus
5) **Sharing the Impact**
    - Friends outreach
    - New fundraising brochure
    - Organized approach to City Council
    - Outreach programs
    - Relationships with local media
        i. Monthly updates in *newspaper*
    - Social media engagement
        i. Damaged materials waived with pet photos.
    - Updated, useful website
6) **Thriving Together**
    - Collaboration between Trustees and Friends on Bookmobile campaign
    - Development Committee formed with Friends and Board of Trustees members
    - Internal reorganization
    - Opportunities for library staff, boards, and volunteers to connect
        i. Staff presentations at BOT meetings
    - Programs with community partners
    - Reinvigorated partnership with library Friends

SOAR Analysis

SOAR is a strengths-based approach to strategic analysis and works well for organizations with a track record of success. SOAR examines strengths, opportunities, aspirations, and results. Participants spent significant time during the retreat engaged in small group work focused on each facet of SOAR. Discussions included multiple prompts to support robust conversations that outlined Public Library's successes, identified opportunities in the library's ecosystem, and described what is most important to stakeholders. When discussions identified weaknesses or threats, participants were encouraged to define what improvement looks like and to articulate the opportunities for the library to address perceived threats. Finally, participants articulated what success would look like and how it would be quantified. This structure is future-focused so that the strategic plan can reflect dynamic action, incorporate creative ideas, and design optimistic goals for the future.

SOAR Analysis- Strengths

- Clear organizational mission, goals, plan
- Community outreach
- Community support
    - Funding
    - Generosity
    - Resilience
- Community values the library as a resource
- Consistent communication
- Creative
- Depth of available materials
- Ease of access
- Facility is a community space
- Flexibility
- Growth of community
- Inclusive customer service, adapts to feedback
- Library hours
- Library leadership
- Organizational growth mindset
- Partnerships
- Programming
    - Diverse
    - Easy to access information and schedule
    - In-demand
    - Meets community needs
- Sense of connection
- Staff
    - Responsive
    - Teamwork
    - Trust
- Strong relationships throughout community
- Variety of offerings

SOAR Analysis- Opportunities

- Analysis of Bookmobile's first year
- Appeal of library amenities, spaces
    - Safety
    - Technology
    - Welcoming
- Capitalize on community desire to connect
- Community Campus Plan that serves both the library and community needs
- Deliberate partnerships
- Engagement with key audiences
    - Aging population
    - Donors
    - Increasing diversity in demographics
    - Municipal leaders
    - Teens
    - Working families
- Funding support
- Increase library awareness for low-information community members
- Information literacy
- Library as community hub
- Multi-lingual collection
- Population density, growth
- Scaling library engagement with key community issues:
    - Climate/natural disaster
    - Employment, workforce
    - Housing
    - Immigration
    - Increase in those affected by poverty
    - Transportation
    - Uncertainties about social, federal systems
- System-level marketing
- Technology advancement
- Trusted resource

SOAR Analysis- Aspirations

- All community members find the library relevant, useful
- Awareness and understanding of return on library investment for community
    - Conserves resources
    - Sustainable
- City-wide communication
- Connection
- Community gathering place
- Community partner of choice
- Dedicated to responsive public service
- Diversified funding
- Ease of access, use of plentiful resources and information
- Enhance patrons' everyday living
- Environment that is safe, welcoming, uplifting to all
- Improved collaboration with South Central Library System
- Increase community involvement in library
- Inspire generations of users
- Library use increases
- Library values are evident in materials, programs, and services
- Provides self-directed education and personal improvement
- Relevant technology
- Space expansion
    - Community use
    - Flexibility
- Support civil discourse
- Support of right to read, anti-censorship
- Sustainable growth of library as organization
- Technology for variety of uses beyond computing
- User feedback is regularly sought and incorporated

SOAR Analysis- Results

- Achieve goals with sustainable growth
- Data analysis across past performance and peer libraries
- Focus groups, exit interviews
- Goals for different parts of library e.g. Board of Trustees, Friends, Staff, Statistics.
- Increase library donors and donations
- Leverage city resources for communication, social media
- Operationalize Library Board report to City Council
- Publicize library savings on checkout receipt
- Regular surveys for community input
- Reliable library revenue

No Brainers

These concepts represent "easy wins" or obvious goals and objectives for the library to incorporate. They may be first steps towards complex goals. They may have a sense of urgency or immediacy.

Culture & Values

Retain connection to core library values and mission. Free access to information, the right to read, and the right to privacy are at the heart of equitable service for all patrons. The organizational culture has a growth-mindset, is resilient, and can adapt to changing landscapes.

Library Facility

Engage in high-level participation in the Community Campus Plan. Articulate goals and vision that are aligned with library and community needs.

Municipal Relationships

The Library Board and Friends are mobilized to advocate for the library throughout the community. They gather supporters beyond elected representatives and cultivate relationships with community pillars, business leaders, and major donors. This is key to ongoing and future support for library governance, funding, and the campus plan.

Patron Experience

Patrons remain the core of the library mission. Patron feedback is sought the regular satisfaction surveys and acted upon. There is a high level of patron participation in the community campus process and the library's positions on the project reflect known patron needs. The library is aware of the "pulse" of the community even beyond the library.

Audacious

These bold, audacious ideas may have a transformational effect on the organization and community. They may require mid- to long-range planning and the achievement of many smaller goals.

Advocacy

The library is a resource, service, and community concept that exists beyond the walls of a building and is more than "just" books. The library is top-of-mind for all community members when they encounter a need to meet, learn, or gather.

Library Facility

The library inhabits a beautiful, inspirational facility that fulfills the needs of a community campus. The facility has expanded and modernized spaces that meet user needs. The facility includes an auditorium for larger events and performances.

Library Funding

The library accesses diverse revenue streams that may include business sponsors, independent funders, legacy and major donors, and a robust endowment.

Emerging Ideas/Themes

- **Awareness**

  Feedback from retreat discussions indicates the City appears to be highly aware of and supportive of the library. Key community connectors can ensure this continues and provide access to new audiences. Friend-raising, pillars of the community, the chamber of commerce and the city council should remain part of the current library awareness strategy. Create specific outreach strategies, messages, and goals for these stakeholders that relate to the strategic plan.

- **Communication**

  There was positive feedback about the director's current monthly and annual report formats. Ongoing communication in this format is valued by all community stakeholders. Continue this practice and adapt to the structure applied to next strategic plan. Strong relationships across library and city leadership can support standardization and amplification of messages.

- **Community Campus Plan**

  The developing Community Campus Plan offers Public Library an opportunity to imagine a new space. The library already has a strong voice in the early planning phases. The Director, Board, and Friends must be strategically aligned for the library to maximize the impact of this potential project. Understanding the space and programmatic needs, considering community feedback, and project management will require considerable time and knowledge outside other responsibilities. Communication with stakeholders throughout the process will be critical to successful alignment.

- **Community Thriving Together**

  Connect community members at the library, through library programs and with intention. Programming and events enhance neighborly and civic relationships. Partnerships, appearances at community events, creating marketing assets, and the promotion of library resources requires significant time investments for success. Examine models and feasibility for sustainable growth of these staff roles or expansion of budgeted positions to support these critical duties.

  - Person-to-person connections remain a strong source of library promotion. Consider ways to invite and coach patrons to share library information.

- **Culture & Values**

  The Public Library is mission-driven, provides a high level of patron service and care, and is deeply connected to the community's needs. These values are critical to carry over to a new strategic plan. Reflect on how to incorporate library culture and values in new strategies and goals.

- **Data**

  Libraries collect and generate data regularly. Public Library has been effectively using data to communicate outcomes from the previous strategic plan. In the next plan, assess the data needed to demonstrate success. Analyze and contextualize this data to connect it to the strategic goals, performance indicators, and other metrics. This delivers actionable information to library decisionmakers.

- **Friends of the Library**

  The library's strategic plan must incorporate its relationship with the Friends. Assess the benefits of a strategic plan for the Friends to achieve growth in membership, donor engagement, and fundraising.

  - The Friends of the Library fundraising is critical to the long-term financial stability of the library. Scaling Friends volunteers requires strategic goal setting, fundraising and friend-raising skills and resources, and alignment with the Library Board and Director.
    - Further define roles and train volunteers to help with awareness and fundraising efforts.
    - Fundraising tools should be aligned with best practices and industry standards.
- **Population Growth**

  There is population growth both locally and regionally along with housing growth in municipality. This impacts both the service population and the property tax revenue. Monitor the effects on demographics and library impacts. Plan for sustainable growth of collections, programs, and services. Examine and pursue diverse revenue sources that aren't reliant on population and property ownership.
- **Programming**

  Programming has high patron appeal and high attendance. Sustainable growth and expansion may not be possible without creating greater capacities, especially in the areas of budget, space, and staff time. The strategic plan must address how library programs best serve the library mission, program design, and program priorities. Define any audiences that are key demographics to reach through programming. Perform a needs assessment and identify library programmatic goals for the Community Campus Plan process.
- **Return on Library Investment**

  Utilizing library collections and resources is a good return on community investment. The library provides resources that people either cannot afford or choose not to spend money on. This makes good fiscal sense and promotes sustainability. The library is responsive to patron needs and offers things that are useful to community members. Continue monitoring data and outcomes that can help communicate this return on investment and share widely through structured communication and reports.
- **Strategic Plan**

  The group had consensus about the format and effectiveness of the previous plan. Having areas of focus allowed flexibility to be responsive, to pivot when necessary, and to adapt goals over time. If the next plan continues this format, set SMART goals regularly and nest them within plan objectives and outline the measurements for success.

  - Feedback from this session does not reflect the needs or ideas relevant for library staff. Solicit structured staff input to drive internal strategies and goals. Staff may be helpful in articulating ways to incorporate culture and values in the next strategic plan.

Parking Lot of Ideas

There are useful, granular ideas in the raw notes captured at the retreat. This category represents some of the applicable ideas germinated but were either too specific or outside of the scope of the existing categories.

Data Analysis

- One small group provided a high level of detail on potential areas of data analysis. Review these group notes as the measurables and outcomes of the strategic plan are defined.

Library Policy & Procedure

- Anecdotal evidence for more, increased hours. Seek additional feedback from patrons and assess findings and resources available.

Library Services

- Increase inclusion and access by offering translation services when public forums and panels take place at the library. Assess needs for which languages are needed.

Programming

- Expand all-ages programs.
- Provide programs that highlight local talent, experts.

Technology

- Artificial intelligence was a specific topic that teetered between opportunity and threat. The strategic plan might not address this technology directly, but specific objectives or goals may incorporate policies and procedures or uses for or programming about the technology.
- Consider hands-on and creator technology such as 3D printing, craft equipment, etc.