

Framing the Future: Advancing Strategic Planning for Small and Rural Libraries

Statement of Need: The Montana State Library (MSL) requests \$169,400 to create a regional capacity building project with bordering states in order to rethink and advance rural libraries' planning efforts within a community engagement framework. The need for planning is broadly understood and promoted by national library agencies and increasingly state libraries are requiring strategic planning. In MSL's experience, a persistent problem exists with small libraries not recognizing the need, not having the experience and capacity to undertake planning, and not having the resources to do planning (or do it well). This project addresses all three of those issues and challenges and will both create a foundation for improving community support for participating libraries and increase the capacity of library staff to engage in thoughtful, community-based planning.

Overview: MSL encourages strategic planning among its libraries and sees *Framing the Future* as a way to overcome resistance about the effectiveness of planning in rural areas. Working with Library Strategies Consulting Group (LSCG), MSL will engage librarians across the region with a three-fold, action-oriented approach to directly engage community and library stakeholders in strategic planning. Scaling this continuing education project to incorporate up to seven states in a community catalysts initiative will mean greater benefits to a much broader range of library stakeholders. North Dakota, South Dakota, Wyoming, Oregon, and Idaho state libraries have committed to participating in the project, with an invitation to Washington, as well. The approach focuses on public and tribal libraries across the region that have service areas of less than 150,000 (the majority of the region). Training library staff LSCG's planning process, which is centered on community engagement, will equip libraries to think differently about strategic planning. The deep focus on engagement through the project and the trainings will involve directors and staff in a process that blends local needs with national trends to create realistic and forward-thinking plans.

Project Design: The three phases of this project include eight regional workshops or pre-conference sessions; two training institutes; and remote consultation and follow up with the new trainees. First, 3-4 hour regional workshops will be held in each state coordinated through the state libraries. Led by LSCG, these workshops will provide pre-planning and lay groundwork to energize rural libraries regarding planning. The sessions focus on the benefit for libraries to do planning and community engagement. The content will include the changing nature of library work and communities; how to do planning effectively and frugally; ways libraries have benefited, including case studies; and the danger in not planning for their library's future. There will be no cost to participate for attendees. Each of these sessions will serve 25-40 people, including directors and library trustees, and be held during Fall 2020 and early Winter 2021.

Two intensive training institutes will be offered in locations that facilitate travel from all seven states. These institutes are for individual library staff to become facilitators of the LSCG process (Rapid Results Planning), and participants will commit to subsequently facilitate a specified number of strategic planning processes in the region for libraries other than their own. The two-day, interactive institutes will feature the following sessions and activities: training overview; description of the planning model; case presentations of planning processes; step-by-step description of the planning process; role and use of surveys and other community inputs; library trends and opportunities; a mock community planning retreat; drafting a strategic plan; facilitating the implementation planning process; and "What if..." session to address potential questions and challenges in the planning process. The institutes include a handbook detailing the process and philosophy behind the planning model, including sample materials. Approximately 75 pages in length, the training materials will be produced in a format that is comprehensive and user-friendly.

LSCG has facilitated the planning model with more than 50 libraries nationwide, and tested the institute trainings in Georgia, Florida, and in South Carolina (fall 2019). The model is built on broad and deep stakeholder engagement, with results that are energetic, collaborative, and drive the library to further meet

community needs. The process is designed to be done quickly (three months from beginning to final plan) and culminates in a plan that has buy-in from a broad base of the community, making it ideal for smaller libraries. MSL has seen the results of this process, notably in Bozeman and Helena, and values the potential for the training to revitalize strategic planning and the understanding of its value across Montana and all participating states. There will be 8-10 institute participants from Montana and 4-6 participants from each of the bordering states, all of whom will be able to facilitate the planning process after the institute. There will be no cost for participants and expenses will be paid for all participants to mitigate barriers for attendance. The institutes will be held in Spring 2021.

As the third tier of this project, LSCG will provide remote support to the state libraries and the participants in the institutes for a year afterward. This includes overall support and check-ins, as well as counsel to participants as they conduct their own strategic planning sessions and processes. In addition, MSL and LSCG will provide a digital platform to keep the training cohort in contact so that the newly trained facilitators can work through problems together.

Diversity Plan: A well-designed strategic plan identifies what members of the community are not being served and works toward creating inclusive services and libraries that welcome all members of their communities. A good plan recognizes and appreciates the diversity of these communities. This project's diversity is also centered in serving economically stressed rural areas and will endeavor to make sure staff are included who are most in need of these capacity building efforts in their communities. MSL will contract with an outside firm to conduct in-depth evaluation of each stage of the project and solicit feedback from participants and the library staff as they conduct planning locally.

National Impact: MSL will relay the broader potential impact of the project for the larger library community through presentations at one or more of the following conferences: ALA/PLA, ARSL, COSLA, and the Mountain Plains Library Conference. Presentations may also occur at the state library conferences in the region. *Framing the Future* is scalable for individual states, regional areas, and other multi-state consortiums, like the one proposed in this project.

Goals & Outcomes: The project goals are: approximately 50 library staff build capacity through strategic planning training; approximately 240 library staff and trustees advance in their knowledge of, and increasingly value, strategic planning; and that rural libraries across the region are better prepared to face the changing future of libraries and reaffirm their status as vital centers of their communities.

Budget Summary:

- MSL staff pre-workshop facilitation (3 workshops at \$1000 per): \$3,000
- MSL staff institute facilitation (2 workshops at \$5,000): \$10,000
- Library Strategies Consultants for pre-workshops (8 workshops at \$1500 per): \$12,000
- Consultant cost per Institute training (2 @ \$30,000): \$60,000
- Per diem/travel costs for consultants: \$18,000
- Travel costs participants, including hotel, mileage, per diem (est. \$750 per participant outside of MT and \$500 per participant from MT): \$31,000
- Grant Administration (at 10% of total budget): \$15,400
- Workshop and training materials: \$4,000 (\$500 per workshop)
- Evaluation costs: \$10,000
- Off-site mentoring consultant cost: \$6,000

MSL will provide \$34,750 in kind support to the project, including staff time, travel budget for staff and facilitators, meeting and supply costs.