

Developing a Strategic Plan for the Des Moines Public Library

Part Two: Strategic Goals with Objectives; Annotated Bibliography

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INFO 204-14

November 13, 2019

Abstract

Part two of the organizational strategic planning of Des Moines Public Library contains five strategic goals, compiled after the analysis of information gained from a literature review, SWOT analysis, and environmental scan detailed in part one of this study. These goals are to be completed within the 2020 and 2025 fiscal years and include generating budget sustainability, improving customer access to buildings and materials, improving technological offerings and technological literacy advancement opportunities, enhancing the library's ability and capacity to support the diverse communities of Des Moines, and increasing employee retention and engagement. Each goal includes three objectives and includes a plan for accomplishment as well as assessment for the objectives. The goals, objectives, and assessment matrices are followed by an annotated bibliography of essential resources used in the analysis of this organization and formation of the strategic goal.

Keywords: Des Moines Public Library, strategic plan, goals, action plan, technology, budget, fundraising, employee engagement, access, community, library services, partnerships, outreach

Introduction

The Des Moines Public Library is always striving to improve service to its communities and patrons while practicing sound fiscal policies. Achieving both of these objectives, which can sometimes be at odds with one another, takes careful strategic planning. In part one of this report we conducted a literature review, an environmental scan, and a SWOT analysis that have informed the five goals that make up our strategic plan goals. For each of these goals we have identified three concrete and actionable objectives, which in turn consist of an action plan and assessment criteria.

The plan starts with the budget sustainability that DMPL needs to remain viable as an institution. We will achieve this sustainability through a mix of improved resource allocation and increased funding via grants and philanthropy. Three goals focus directly on patrons library-wide: improving access to building and materials, enhancing technology offerings and technological literacy programs, and expanding community outreach. Our patron access goal involves library branch renovations and parking improvements, plus implementing a new mobile library. For our technology goal, we will invest in hardware upgrades, offer computer skills classes, and create a new makerspace. And to expand community outreach, we will increase opportunities and resources at our South Side branch through community partnerships, expand services for seniors, and offer classes to help improve employment in the community. Achieving these patron-centric goals will require a dedicated and engaged workforce, leading to our final goal focusing on employee engagement and retention. By improving communication between leadership and staff, enhancing employee development, and implementing a new employee

recognition program, we will give staff the tools and motivation they need to help make the DMPL strategic plan a success.

Following the strategic goals is an annotated bibliography of sources that informed our strategic plan. These reference materials collectively provide theoretical background and practical steps for plotting a course to ensure the DMPL remains a vibrant and essential part of the Des Moines community now and well into the future.

Des Moines Public Library Strategic Plan (2020 - 2025)

The Des Moines Public Library (DMPL) of Iowa strives to continuously advance by improving how they serve the community. By generating budget sustainability, improving customer access to the library's buildings and materials, investing time and resources to create a communication technology hub, teaming up with community partners to create more opportunities and resources for all branches, and increasing employee retention and engagement, fiscal year (FY) 2020 to 2025 will greatly improve DMPL.

Goal 1: Generate budget sustainability through applied practices and policies.

Objective 1.1: *A Resource Allocation Plan will be created for all branches to reference when writing their branch-specific Collection Plan which will be revisited annually in order to continually develop and control costs.*

Action Plan: Over 40% of the DMPL budget is allocated for library materials. DMPL will continually improve resource allocation in all branches by first performing collection evaluations, referencing the last 15 years, at each branch. After which, a Resource Allocation Plan, individual branch Collection Plans, and the Purchaser Policy will be created or updated for the following fiscal year. The collection evaluation, including both digital and physical materials, will consist of a collection analysis and a collection assessment. Each collection evaluation will be analyzed, compared with other branches, and consolidated into a systemwide report, seeking multiple facets of information: 1) circulation rates to determine heavy- and low- use material to identify resource prioritization, opportunities for retention expiration or relocation, and indicators for user-demographic changes, 2) collection spending history by year, branch, and subject to help determine if the allocated spending correlates with current branch-user population's needs, 3) collection assessment to identify strengths and weaknesses of subject support, perform branch comparison of percentage of library use, evaluate the effectiveness of any recent changes, and seek out opportunities for library consortia, I-Share, and programs for digital subscriptions.

Assessment: Due to resource allocation being an essential and continually developing task, each branch will assign personnel to perform the collection evaluation annually, starting FY 2020, and enter the resulting data into the systemwide database, to be completed by the end of Q2. At the beginning of Q3, each branch will perform a mid-fiscal year review to gauge the effectiveness of the branch following their current Collection Plan, removing barriers when necessary to realign. Lastly, each branch will perform an annual summary by the end of Q3, assessing their observations of interventions for the current fiscal year and identify any improvements, e.g., increase in circulation rates, decrease in customer wait times with interlibrary loan (ILL), increase in materials budget and cost-effectiveness of its collection resources, or decreased collection size due to digital supplementation, offsite relocation, or retirement. Every branch's annual summary will be delivered in a consolidated report to the Board of Directors, making the case for funding, identifying trends and new areas of interest, and giving their forecasted strategic direction for the library system, including any updated plans and/or policies for the next FY.

Objective 1.2: *Research and application of grant dollars to diversify source funding.*

Action Plan: The awarding of grants that fit within the library sphere will assist in diversifying source funding for DMPL. In order to be successful, the library will invest in personnel either be hiring experienced staff and/or training current employees in library grant writing by the end of Q4 FY 2019. The library grant writer(s) will research the grant cycle process, perform source identification to find appropriate grants that align with the strategic plan and mission of DMPL along with Des Moines' community needs, and write grant proposals for the Library Director to approve for application.

Assessment: Due to the number of applicants and cyclical nature of grants, applying for grants requires strategic planning. Strategic planning will include which grants to apply for, when to apply for the grants, and obtaining stakeholder buy-in. The library grant writer(s) will collaborate with internal departments, stakeholders, and community partners to produce a five-year schedule by Q3 FY 2020 with goals such as successfully awarded grants equal to 10 % of the DMPL budget and applying for a minimum of five grants per FY. The library grant writer(s) will create a database to capture grant research, application history, and grant feedback, providing advice on how to be successful for secondary applications. Lastly, DMPL will provide continuing education opportunities each year such as conferences, workshops, and webinars for the library grant writer(s) which will also be captured on the database.

Objective 1.3: *By fostering a culture of philanthropy, DMPL will increase source funding diversification for specified costs identified in the Library Development Program.*

Action Plan: Public funding to support DMPL has become unreliable. To give stability to DMPL's budget and fiscal expectations, DMPL will focus on obtaining sponsorship through philanthropic sources. Utilizing the Library Development Program as a reference, the DMPL sponsorship support staff will solicit and perform outreach to local community businesses, philanthropists, corporate partners, and patrons who utilize and frequent the library. They will also create methods of cultivating and enriching sponsor relations.

Assessment: DMPL will provide sponsorship support staff, at least one employee per branch by end of Q1 FY 2020. Each employee will have a seat on the DMPL Donation Committee along with the Program Coordinator, Community Engagement Supervisor, and Library Director. The Donation Committee will put together annual goals by Q3 FY 2020 in

order to achieve 20 % of the DMPL budget, increasing three percent each year, and coordinate an annual recognition celebration. The goals will reference the projects identified in the Library Development Program, all upcoming five-, 10-, 20-, and 25-year projects, detailing their estimated costs, priority level, and methods by which donors are to be acknowledged. Each sponsorship support staff will plan and coordinate quarterly sponsor-perquisite events for their designated branches and onsite marketing events for potential sponsors. The Donation Committee will also perform research on local non-profits, for the last 10 years, to be completed by Q4 FY 2020. This comparison will identify the standard of giving for the area and assist with future goal setting for DMPL donations. Lastly, the Donation Committee will provide excellent stewardship of DMPL sponsors by providing transparency through an annual sponsorship report, made public on the DMPL website for each FY.

Goal 2: Improve customer access to the library's buildings and materials.

Objective 2.1: *Enhance customer access with renovated library branches.*

Action Plan: As the definition of a library is every-changing and evolving, it is up to the Des Moines Public Library to change as well. The library branches will need renovations to update the space and technology. We will be looking at adding meeting and makerspace rooms, updating public computers, adding other technology (3D printer, printing press, etc.), continually updating and improving the virtual library through DMPL's website, and deciding if building a new branch is needed to cover the gap of space between branches. Each of the six branches will be renovated over a five-year period. Meetings about these renovations will begin in 2020 between branch managers, assistant managers, library administration, and the Library Board of Trustees. The initial meeting will set up funding projections and a branch need study.

Assessment: A branch need study is essential for each of the six branches in order to determine what needs to be updated and what the community needs most out of their library. The branch need study will include an assessment of the branch's condition, an audit of technology within the branch (see objective 3.1), feedback surveys from both staff and the community, and the possibility of adding another branch to reach more of the Des Moines community.

Objective 2.2: *Improve parking around the Des Moines Public Library branches.*

Action Plan: Parking for the different Des Moines Public Library branches is limited. One branch has an underground garage, while others rely on street parking, parking shared with other buildings, and limited spots directly in front of the branch. In the beginning of Q1 FY 2020, all branch managers and assistant managers will meet with library administration to discuss the expansion of branch parking lots. These ideas will then be taken to the Library Board of Trustees to discuss the financial aspect of expanding the parking lots as well as finding a suitable company to construct these new lots. We expect this to be part of a five-year plan of branch renovations, that will include fundraising, hiring a company to build new lots, working with the city for land permits, and constructing new parking lots.

Assessment: Branch managers and assistant managers will conduct a survey among the staff for input on the new parking lots. Library administration will start a customer survey both online (on the DMPL website) and on paper to send to the individual branches. The surveys will inform our customers of our intent to expand parking options and ask for feedback based on their personal experience. These surveys will be sent out at the beginning of Q2 FY 2020 and collected at the beginning of Q3 FY 2020. By Q4 FY 2020, all surveys will be recorded.

Objective 2.3: *Improve customer access to library materials by creating a mobile library service.*

Action Plan: Due to not all library customers having access to our branches or online services, a mobile library service will be implemented. Each branch would have its own mobile library van that would be stored in their parking lot. When this service is ready to start, Q4 2022, each branch would be assigned specific underserved neighborhoods in the Des Moines community. Each van will be filled with materials from all sections, e.g. adult fiction, nonfiction (adult and juvenile), young adult, children, graphic novels, audiobooks, DVDs. They will visit the area for one hour and allow customers to get a library card and check materials in and out.

Assessment: Library Administration will work with the Library Board of Trustees on funding for the mobile library vehicles. A study will need to be done to determine which neighborhoods would benefit the most from the mobile library and would be actively participating in checking in and out books. This study will start at the beginning of Q3 FY 2020 and be conducted for a year, ending when Q3 FY 2021 starts.

Goal 3: *Invest time and resources to improve our technology offerings and technological literacy of the public, making Des Moines Public Library a communication technology hub.*

Objective 3.1: *Modern libraries have an obligation to be at the forefront of information technology. We will ensure that staff and patrons have high-grade materials to work from.*

Action Plan: A technology assessment plan will be drafted with DMPL's Technology Services and branch managers to assess every computer in the building, its current working status, and software status. Within five years, every staff and patron computer will be updated with current hardware in order to support current software needs. This action plan will be

dedicated to taking inventory of every computer in each branch location and will start Q1 FY 2020. At this time, Technology Services will assess the equipment and determine how well the hardware is servicing the current system. The team will also assess how soon they believe the hardware will need to be replaced with newer models to support upcoming computer advancement, and hypothetical computer advancement to anticipate system needs within the next five to ten years. At this time, Technology Services will be in charge of drafting a plan to update technological equipment to deliver to the Board of Directors and the Foundation to decide how to properly fund the effort.

Assessment: Technology Services will have a total of three financial quarters, beginning Q1 FY 2020 to report their inventory assessment, and projected technology replacement needs to the Board of Directors. At this time, the Board of Directors, the Deputy Director, and the Foundation will have an additional quarter to plan out how to best finance the updates in the following four years. After the financing plan has been delivered, an update on the progress of this effort is expected every six months at the Board of Directors meetings.

Objective 3.2: *In being true to our mission of supporting lifelong learning, every branch will hold regular computer skills classes for patrons of all ages, focusing on those facing information poverty.*

Action Plan: Currently, North Side Library and Central Library branches have semi-regular programs addressing computer skills instruction. A systemwide committee, made of at least one librarian from every branch and one building manager, will design uniform goals for the classes and teaching methods. It is understood that these are goals to direct the program as each branch will have their own important literacy needs. Beginning Fiscal Q2 FY 2021 the

committee will meet once a month for two quarters to build their guidelines, and then meet once every quarter to update as needed. Additionally, it will be up to each librarian — with supporting staff — to analyze which demographic group of their regular patronage has the highest level of need in order to build their program content and meeting time(s).

Assessment: After the committee has finalized their program goals and curriculum, due Q1 FY 2022, branches will have one marketing cycle of four months to prepare the program for their own branches. After three months of regular weekly programs, each branch will assess attendance, patron satisfaction, and curriculum satisfaction. If the branch is not doing well in any of these areas it will be up to the committee to brainstorm on what is and isn't working and to make changes to the program as necessary. If the programs have steady attendance, positive patron feedback, and have indications patrons are getting a good understanding of the computer skills, then no changes will be necessary.

Objective 3.3: *We will dedicate ourselves to becoming a technology hub by creating a makerspace for our staff and patrons to visit, learn, and create.*

Action Plan: Because of its abundance of space, Central Library will be home to the new makerspace. It will include technologically advanced items to use under staff supervision and/or assistance, and practical technologies to help patrons in their everyday lives like sewing machines. Eventually, select items will be available to check out by patrons and staff for program use. These items will transfer between branches like the rest of our materials. A Makerspace Committee of librarians from each branch will get together and assemble a comprehensive list of items to outfit the makerspace. This list will be based on both cutting-edge technology to explore, items sturdy enough for patron use, and items of high patron interest. Librarians will

have three months to compile this list and deliver it to the Board of Directors who will take charge of obtaining price estimates and planning the budget for this makerspace. This plan will be due by Q2 FY 2020. An estimated two years is needed to prepare for the opening of the DMPL Makerspace, but librarians are encouraged to create programs around the new materials as soon as they are purchased. Once items are purchased, librarians are to decide which items can travel and check out to patrons. It will also be up to this team to address how to manage high-demand materials, should the need occur.

Assessment: With something as experimental as a makerspace, it may be hard to judge success in the short term. However, public interest will be measurable through program attendance, check-out rates, and patron feedback.

Goal 4: Enhance the library's abilities/capacities by utilizing community outreach.

Objective 4.1: *Team up with community partners to create more opportunities and resources for the South Side branch.*

Action Plan: These community partners will include local grocery store managers, elementary school and high school administrators and teachers, politicians such as aldermen and the mayor, and park district officials. Local grocery stores will team up with the Des Moines Public Library Southside branch by hosting classes on healthy eating and cooking skills. This branch will visit surrounding elementary schools to provide monthly storytime, while the high schools will receive college application workshops. In addition, the library will provide volunteer opportunities for students seeking out service hours. The politicians will collaborate with the library on an early literacy program, which will include a summer reading challenge that concludes with a free book and promotional tote bag. To enhance the south side community, park

district officials will hold weekly gardening classes for four weeks in the spring. During the last class, participants will use their newfound knowledge to help plant a garden outside the library.

Assessment: Tim Paluch, the supervisor of community engagement, will oversee the progress of the new programs and classes. Attendance will be taken and data collected to decipher the continuation for FY 2020. Instructors will gather the data and share with Paluch after programs are finished. Surveys will also be conducted to better improve programming and services in Q1 2021.

Objective 4.2: *Increase services for seniors.*

Action Plan: In order to accommodate senior citizens across all Des Moines Public Library branches, online services such as discussion boards and book delivery systems will be implemented by FY 2021. By the summer of 2020, online services will be available to seniors specifically. Programs such as Authors Visiting in Des Moines (AVID) will be recorded for viewers unable to travel to the library. A discussion board will be available for seniors to address their input in what the library is lacking for senior citizens. Using this discussion board, at least two programs for seniors will be formed by Q1 FY 2021. Volunteer opportunities will be posted monthly. Assisted living homes can sign up for monthly book deliveries. In the beginning of each month residents can request certain titles to receive by the end of the month.

Assessment: Des Moines Public Library Program Coordinator Katie McKenzie will use the discussion board results to plan the two programs for FY 2021. A survey will be available for the assisted living homes participating in the new delivery system.

Objective 4.3: *Improve the community's employment rate.*

Action Plan: Three new professional development classes will be added to the library's course list dedicated to supporting the people of Des Moines. One five-hour long citizenship registration course, to broaden career choices for aliens, will be provided every fiscal quarter of the year, starting in 2021. GED prep course, which will be held at the Central branch, will be available yearly with each course consisting of three nights a week for three months starting in Q1.

Assessment: Katie McKenzie, Program Coordinator, will collect and study evaluation surveys from each course to assess the instructors and overall success of the course to determine the continuation of the course for the following year.

Goal 5: Increase employee retention and engagement.

Objective 5.1: *Improve transparent communications between library staff and leadership.*

Action Plan: In order for library employees to be able to support the organization's mission, they need to know what the goals are that will help achieve that mission. Yet too often, only administrators have visibility into the strategic plan. At our library, we will improve the communication of the plan by involving staff in its formulation and then subsequently notifying the entire organization of shifts in strategy in a timely manner. We will hold quarterly update meetings that will give employees the opportunity to ask questions about and weigh in on the plan. Beginning in Q1 FY 2020 we will also conduct quarterly surveys where staff can offer feedback, express concerns, and ask questions anonymously. These measures will improve staff's understanding of and stake in the strategic plan and allow them to prioritize their

individual work according to how it will best serve the plan, giving them confidence that they are working on the right thing at the right time.

Assessment: We will use the results of the quarterly surveys to assess progress in employees' understanding of the strategic plan, as well as progress in staff perceptions of communication, including whether or not they feel leadership is effectively communicating and listening to staff members' concerns and suggestions. We also will measure retention and hope to see a year-on-year decrease in the number of employee departures, especially employees leaving within three years of being hired.

Objective 5.2: *Increase employee development.*

Action Plan: Library-wide plans are necessary but individual staffers can tend to feel removed from that overarching strategy and find it hard to create their own goals that serve the greater mission. One tool that can help remedy this is the formation of smaller strategic plans for the different units within the library that bridge the gap to the larger organizational plan. Before the beginning of FY 2021, unit leaders and their teams will create strategic plans for their units. Managers will then work with their direct reports to develop personalized development plans for each employee, using the small-unit strategic plans as guidance. Not every goal within the development plan need necessarily tie directly to the small-unit development plan, but each must follow the SMART criteria – that is, they must be specific, measurable, achievable, relevant, and time-bound. The library will also increase opportunities for employee development through training programs including paying for or subsidizing online and on-site conferences and classes, bringing in guest lecturers, and holding in-house training sessions led by leadership and staff.

In-house training will cover new technologies, customer service, industry developments and trends, and other topics suggested by employees.

Assessment: All development plans are to be completed by the end of the current quarter. Evaluation of progress toward development plans will occur during biannual performance reviews. In evaluating plans, we want to see that every employee has at least one more ambitious goal that ties to one of the small-unit strategic goals. In addition, we want to see at least 90% agreement of employees confirming (via the surveys) that they understand how their individual work serves the higher organizational goals. Lastly, we want to see at least 50% of employees to have completed or signed up for some form of training program by the end of Q1 FY 2020, and 85% by the end of the year.

Objective 5.3: *Implement staff recognition program.*

Action Plan: Our new staff recognition program will be a way to reward employees for exceptional performance, including going above and beyond their stated job duties. It will also be a means for leadership to promote the library's culture by communicating its values. We will achieve this latter goal by giving an award for each value. Phase one of the recognition program will involve reviewing and, where necessary, updating all job descriptions. Together with the development plans, this will have the added employee engagement benefit of clarifying roles so that employees better understand their responsibilities and what is expected of them. Staff can then strive to exceed those expectations or undertake extra effort in the award categories of customer service, community outreach, innovative ideas, collaboration, and fiscal responsibility.

Assessment: We will monitor quarterly surveys beginning in Q2 FY 2020 for progress on
1) a reduction in the percentage of staff reporting that the organization does not recognize or

reward their efforts, and 2) an increase in the percentage of staff saying that they feel they have contributed to promoting the library's values. We also hope to see an increase in the percentage of staff reporting that they believe the library has a strong, positive work culture.

Conclusion

The Des Moines Public Library is excited to start our new strategic plan in the year 2020 and is looking forward to launching these objectives and goals that will span five years. This plan includes goals that will generate budget sustainability, improve customer access, progress technology offerings and technology literacy to make DMPL a communication technology hub, increase communication between library staff and leadership, and enhance the library's abilities/capacities by utilizing community outreach. Our strategic plan, which will start in 2020, will help us improve our library branches and become more connected to the Des Moines community. It will also help us accomplish both the DMPL mission of bridging our community to a world of information and the DMPL vision to expand the universe of opportunities to our diverse community.

Annotated Bibliography

Analoui, F., & Karami, A. (2003). *Strategic management in small and medium enterprises*.

London: Thompson.

This book presents strategic management concepts and practices for small-to-medium size organizations in an attempt to fill the gap left by previous scholarship that had limited itself to large corporations and their CEOs. The authors are management consultants at the University of Bradford in the United Kingdom. Though their book is aimed at businesses, their principles are also applicable to libraries, as both types of organizations share resources that the authors identify as making up the building blocks of strategy, including physical assets and employee skills. They outline the four stages of strategic management: awareness, strategy formulation, strategy implementation, and control (during which evaluation and further development occur). While some of the book's sections on competition might not be as applicable to librarians, it provides excellent guidance for conducting strategic planning for libraries, including a chapter on strategy formulation and a background on and explanation of the importance of environmental analysis and SWOT analysis.

Buck, W. (2016). Providing help in hard times: A blueprint for successful strategic planning. *Journal of*

Library Administration, 56(2), 199-208. doi:10. 1080/01930826.2015.1124703

William Buck, a retired Texas State Library and Archives librarian is the author. His article is inspired by the 2007-2009 recession and the blow libraries took across the nation to accommodate new budget cuts. An important note made is that during these kinds of economic trials libraries become more in demand. The column focuses on a blueprint that matches goals, actions, and measurement criteria. Buck gives tips such as installing programmable thermostats, inspecting the windows, and servicing HVAC units before each season in order to cut costs.

Butler, M. A., & Davis, H. L. (1992). Strategic planning as a catalyst for change in the 1990s.

College & Research Libraries, 53, 393–403. Retrieved from

<https://crl.acrl.org/index.php/crl/article/view/14740/16186>

Meredith Butler and Hiram Davis discuss how strategic planning in the 1990s helped create a much-needed change for research libraries to stay relevant and open. Firstly, Butler and Davis talk about how academic librarians feel like they are on a treadmill, with forces pushing them back and forth. Pushing back are the budget cuts, reduced staff, escalating demands, and so on and the forces pushing them forward are the technological advancements that will affect how people learn and teach. The solution that Butler and Davis see is strategic planning and they go on in the middle of the article about the benefits of strategic planning and what it is. They also share the success stories from two universities: Michigan State University and the University at

Albany - University of New York. Both universities were able to succeed because of their new strategic plans. Butler and Davis conclude that going through the process of strategic planning, including an environmental scan and internal assessment, and putting an importance on staff empowerment will lead to a successful organization.

Cannon, A. (2019, June 27). Des Moines sales tax: City tears down blighted homes, extends

library hours. Des Moines Register. Retrieved from

<https://www.desmoinesregister.com/story/news/2019/06/27/des-moines-local-option-sales-tax-lost-1-cent-city-blitz-on-blight-homes-library-hours-polk-county/1584028001/>

Austin Cannon is a Drake University graduate and metro reporter at the Des Moines Register. Previously, Cannon wrote for Ames Tribune, first as an education reporter, and then government reporter. Cannon gives an overview of what the city plans to do with the money they will make by charging Des Moines buyers an extra cent for every dollar. Most importantly mentioned is the hours the Des Moines Public Libraries will be gaining back after previous budget cuts.

Casey, A. (2015). Grassroots strategic planning: Involving library staff from the beginning.

Journal of Library Administration, 55(4), 329–340. doi:10.1080/01930826.2015.1038935

This source is a case study outlining the approaches this library has used to plan change, and an analysis of how and why they worked, written by Dr. Ann Marie Casey. At the time of publication, Dr. Casey was the dean of retention and student success at Embry-Riddle Aeronautical University and is now the Library Director of the Hunt Library at the same university. The author argued that by taking a grassroots approach to writing plans, managers can encourage employees at every level to own the organizational strategic planning and goals to enhance outcome. Although this is a case study focused on one academic library with a fairly small staff, this article was utilized in the literature review focusing on the methods of strategic planning. In part 2 of the organizational analysis this source was considered in writing the objectives of the strategic goals when deciding how best to involve the staff in realizing each goal.

Coleman, D. E., & Robbins, K. (2016). Strategic planning for a single-person medical library.

Journal of Hospital Librarianship, 16(4), 299–304.

doi:10.1080/15323269.2016.1221274

This article outlines strategic planning of a one-person library within a larger nonprofit

organization. At the time of publication, the authors were both in leadership or managerial roles with Hawaii Pacific Health. Dr. Robbins is now the Vice President of the organization. The authors of this study define and describe strategic planning and long-range planning and write how the two may be better suited in different organizational pursuits. This article was used in part 1 of the organizational analysis literature review, helping define terms, and as a reference for a guide to how a strategic plan is formed and written in part two of the analysis.

Corrall, S. (2003). Strategic planning in academic libraries. In *Encyclopedia of library and information sciences* (2nd ed.). Retrieved from:

http://d-scholarship.pitt.edu/25247/1/Corrall_%282003%29_ELIS.pdf

This encyclopedia article presents the state of strategic planning in libraries as understood at the beginning of the 21st century. The author gives an overview of the core concepts for libraries to – concepts that we used to guide our thinking around our own plan. These concepts are the mission, situation audit, environmental appraisal, vision and goals, strategic options, action plans, and performance indicators (which factor into our assessments). The author’s brief history on the subject also helps put these core concepts in context and explains why they are considered fundamental to any strategic plan. The author also presents key elements that fall outside (or under) the core concepts, such as service values and scenario developments. Also of great use are the practical examples the author provides, which allow the reader to see how these core concepts work in action and how they (the reader) might interpolate them into their own strategic plan.

Des Moines Public Library: A plan for tomorrow, 2013-2018. (2013). Retrieved from

<http://www.bradburymiller.com/DesMoinesstratplan.pdf>

This source is a strategic plan written for FY 2013 to 2018 for the Des Moines Public Library with the intent of ushering the library system towards an enhancement of services to improve service to the public. The report was researched and written by the Strategic Planning Committee compiled of Greg Heid, Library Director; Linda Roe, Library Deputy Director; Dory Briles, DMPL Foundation Executive Director; Tom McKlveen, DMPL Foundation President; Sue Woody, DMPL Branch Manager; Dawn Work-MaKinne, DMPL Virtual Librarian; and Cathy Newton, DMPL Office Manager. All authors of this source were high managerial staff, lead library board staff, and their direct support staff. This strategic plan concluded that the strategic goals for FY 2013-2018 were to prioritize on customer service, technology fundraising, and supporting education. Part 1 of this organizational analysis utilized this plan to study where the library has been focusing its efforts and financial resources in the last five years in relation to the needs of the public it serves. Part 2 of this organizational analysis referenced this source to study how change has been planned in the past.

Des Moines Public Library strategic plan Appendix: Section six: Facilities master plan 2013-

2018. (2013). Retrieved from

<http://www.bradburymiller.com/DesMoinesfacilitiesplan.pdf>

The Des Moines Public Library (DMPL) laid out its facilities master plan for the years 2013 to 2018 in the sixth section of its strategic plan. The first part of this master plan talks about the need to compare space needs for the DMPL with other library systems to learn how to improve space standards. DMPL is influenced by the Iowan space demands assessment that is done every five years and is based on identified service and collection needs of the library. The second part of this plan looks at the different demographic areas that DMPL serve through their six library branches. They also have done a study on each branch, highlighting certain areas such as size, collection, technology, circulation, parking, service area population, etc. After the branch information is laid out, there is a Recommended Action Plan and on occasion a Long-Term Plans section. The last section introduces the idea of public library kiosks, a summary, which includes branch recommendations and their costs, and a look again at the service area demographics. This strategic plan is similar to what you would expect to see from a library system. They found areas that needed attention, set up goals, set actions plans, and established a timeline to resolve these needs. It was important in our paper to understand how strategic plans are written and gave useful information so that we could devise our own objectives.

Dole, W. V., Dabbour, K., & Kott, K. (2017). Dialogic approaches to strategic planning in academic libraries: An appreciative inquiry case study at Oviatt Library. *Journal of Library Administration*, 57(4), 468–480. doi:10.1080/01930826.2017.1300499

Wanda V. Dole, Column Editor, is the Emeritus Dean of the Library at the University of Arkansas at Little Rock. This article focuses on strategic plans specific to libraries. Keywords of the column in relation to strategic planning include components, methods, approaches, trends, tools, and training. Other contributors to the column include Katherine Dabbour, the Associate Dean of the Oviatt Library at the California State University Northridge in Northridge, California and Katherine Kott, the principal at Katherine Kott Consulting in Oakland, California. The authors explain the difference between a “dialogic” trend versus a “diagnostic” trend (e.g. SWOT) while leaning towards the dialogic.

Forsythe, P. (1990). An endowment campaign for a public library. *Journal of Library Administration*, 12(4), 103–119. doi:10.1300/J111v12n04_08

Forsythe's article, *An Endowment Campaign for a Public Library*, gives the reader a macro and micro level of understanding, from Forsythe's point of view, on how to create and sustain an endowment for public libraries. Pulling counsel from *Fund Raising*, by Thomas E. Broce, and *The Raising of Money*, by James Gregory Lord, Forsythe gives a step by step explanation how the Iowa City Public Library Foundation adopted and adapted these two sets of instructions, ultimately succeeding in their efforts. The long-term planning "campaign" by the Foundation laid a community-motivated plan of action that layered upon itself as each year went by, in addition to folding in challenge matching grant opportunities and donor recognition. There is no doubt that the successfulness of both the "silent" and "official kickoff" campaigns leaned heavily on the constant backing of boots-on-the-ground efforts and grassroots tactics by both paid and unpaid laborers. Forsythe stressed the importance of an investment policy to maintain, monitor, and manage the nonprofit, one of a few personal biases within the article. This article emphasized how a deeply vetted development plan and public image can have a large effect on one's fundraising potential, both of which are integral in strategic planning and strategic goals.

Fought, R. L., & Misawa, M. (2018). Accepting the challenge: What academic health sciences library directors do to become effective leaders. *Journal of the Medical Library Association*, 106(2), 219–226. doi:10.5195/jmla.2018.350

This scholarly journal article examines the experiences of academic health sciences library directors in an effort to discover the qualities and practices of effective leaders. Fought is an associate professor and director at the University of Tennessee's Health Sciences Library, while Misawa is an assistant professor of adult learning and education at the University of Tennessee. Their analysis of their interviews with eight library directors revealed traits related to strategic planning that were thus applicable to our own strategic plan and that of any library charting its course for the future. The authors noted that every participant in the study stressed the importance of leaders having strategic planning and visioning skills. In particular, the study showed that effective leaders have an awareness of library trends and technology as well as their operational environment (in this case, healthcare and higher education), the ability to make both short- and long-term strategies and decisions, and highly developed critical skills.

Johnson, Q. (2016). Moving from analysis to assessment: Strategic assessment of library collections. *Journal of Library Administration*, 56(4), 488–498.
doi:10.1080/01930826.2016.1157425

Johnson lists 19 references used in researching library collection evaluation for this article. Johnson's task was to show how Collection Evaluation, through analysis and assessment, is integral to a library's success when performed regularly. Those successes being collection spending, current patron population satisfaction, collection inventory, and toward the library's

overarching strategic plan and goals. The article only lacked detail concerning software options to ease the labor intensiveness of collection evaluation. However, that may be due to the complexity of options in software, and would be best as single topic in an associated article. The care taken to clarify the difference between analysis and assessment along with detailed explanations why it is important to perform both, cannot be understated. Johnson reminded the reader of the importance of libraries having a continuous process, such as seeking out new library consortia opportunities, recognizing changes in patron needs and demographics, and how an up-to-date inventory is essential to understanding where a library is in order to know where to go next. Regular collection evaluation, including inventory, shows how well the life blood of the library is serving its community. This topic's importance is supported by other articles on the issue, making it a strong initiative with strategic goals for any information center.

Kelly, T. (2010). A positive approach to change: The role of appreciative inquiry in library and information organisations. *Australian Academic & Research Libraries*, 41(3): 163–177.

doi:10.1080/00048623.2010.10721461

Dr. Tricia Kelly is a research librarian at the University of Southern Queensland and has written several articles on technology within information studies, team, and change management. . In terms of technological advances within the library, Kelly focuses on the approach of Appreciative Inquiry (AI). The concept, over twenty years old, is increasing in its relevance. AI studies certain approaches and discovers the best results within individuals, teams, and organizations at whole. Unlike previous techniques, AI finds what works instead of finding issues and creating resolutions.

McGee, R. (2006). Information technology (IT) strategic planning for libraries. *Library Management*, 27(6/7), 470–485. doi:10.1108/01435120610702459

This article is written by Rob McGee, the founder and president of RGM consultants, an information technology consulting firm. The author's position may result in a bias of information reporting on information technology. The intent of this article is to provide an approach to strategic planning in reference to technology in libraries. The article highlights the benefits of creating strategic goals with technology advancement in mind. This article was used to inform technological goals in the strategic planning of part 2 of the organizational analysis, and to inform the different methods of strategic planning in the literature review of part 1 of the organizational analysis.

Pacios, A. (2004). Strategic plans and long-range plans: Is there a difference? *Library Management*, 25(6/7), 259–269. doi:10.1108/01435120410547913

This journal is written by Ana R. Pacios who works in the Library Science and Documentation Department at Carlos III University in Madrid, Spain. The main objective in this journal is to analyze the difference between the terms “strategic” and “long-term” when it comes to libraries creating plans for the future. There were 65 libraries in total looked at — 34 of them were public and 31 were university libraries. The audience for this type of journal would be those in library administration who are wanting to see the effect of terminology before writing a plan. Pacios details the history of both “strategic” and “long-term” planning and the research that other professionals had done over the two terms. The previous research is about strategic and long-term planning in libraries and the differences between the two. Towards the end of looking at what past researchers have said, Pacios points out that current literature does not make any distinguishing differences between the two terms and almost always uses strategic planning. The conclusion to this content analysis is that the two terms do not have any type of effect. The real difference between public libraries and university libraries in how they write their strategic plan. The models used by the different library systems is entirely their own, but the groundwork for both is very similar.

Perrin, J. M. (2017). Strategic planning from the bottom up: A unit strategic plan that pushes change. *Journal of Library Administration*, 57(6), 712–722. Retrieved from

<http://libaccess.sjlibrary.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=lls&AN=124896661&site=ehost-live&scope=site>

Perrin’s article lists several references: journals, websites, and books. The article is written from Perrin’s point of view when integrating a strategic plan for the unit he currently managed. Thus, the pros and cons of unit strategic planning are skewed to that experience. Perrin set out to explain the benefit of having a “bottom up” approach to strategic planning. An overarching strategic plan is a guide to understanding how each unit can individually participate by setting their own strategic plan and goals. Through the pilot’s timeline, Perrin relayed many lessons that were learned and epiphanies that were realized. The organization understands the unit’s purpose and participation under the company’s umbrella and the manager sees the unit as made up of individuals to invest in and seeks out opportunity for their unique goals. The manager can also understand each individual use of time better and guide them more efficiently. This article brings the employee back into scope under large canopied companies, worth integrating into strategic planning and strategic goals.

Siemensma, G. G. S. (2017). Winning grants: a how-to-do-it manual for librarians. *Journal of the*

Australian Library & Information Association, 66(2), 200–201.

doi:10.1080/24750158.2017.1319013

Siemensma reviewed Gerding and MacKellar's book, *Winning Grants: A how-to-do-it Manual for Librarians*, to help librarians understand the gravitas it has to help librarians write and apply for grants, giving her full endorsement. The article gives a synopsis of the book's content, which is broken down into three parts. Part one introduces readers to grant writing via the grant cycle process. Siemensma emphasized its theme of being prepared before starting the process, planning for all the complexities the book introduces to you. Part two motivates the reader by celebrating success stories. Part three offers tools for guidance to help one get started via templates. The information Siemensma provided is effective in that it gives a well-rounded review with enough data for one to grasp the full intent and content of the book. This article was useful to the research by giving an understanding to grant writing and how integral a well taught grant writer is to the success of a grant being awarded. Thus, making it an important objective within strategic goals.

Truck, L. (2002). Plain English collection budgets: A collection plan for public libraries. *The Bottom Line, 15(4)*, 167-173.

This journal article examines the creation, implementation, and results of a new collection plan for the Public Libraries of Des Moines (or PLDM, and now known as the Des Moines Public Library) undertaken in 1995. The author is Lorna Truck, Deputy Director of the PLDM. Her goal in writing the article is to give librarians insight into the strategic planning process the PLDM used to modernize its circulating collections after years of neglect and almost a decade of budget stagnation. Our team used this previous plan as background information in forming a new strategic plan for the library. PLDM began its previous strategic planning process by auditing its current collection and establishing success metrics. Two overarching goals guided the program from a high level: creating a collection of 500,000 items with a median age of five years, and readers having a 50% chance of finding the item they're looking for within the collection. The plan resulted in concrete benefits including decreased waiting times for popular titles, and materials circulation growth of 18% even as the PLDM reduced its collection size by 15%. Other benefits the author concludes the article with include having a plan that they can easily explain and to the city council and team unity as library staff work together toward the plan's longer-range goals.

Williams, J. F. (Ed.). (1991). Strategic planning in higher education: Implementing new roles for the academic library. New York: Hawthorn Press.

This volume contains articles that were written by college and university presidents, campus planners, and libraries. This volume was also edited by James William II who is the Dean of

Libraries at the University of Colorado at Boulder. The purpose of this volume and subsequent articles is to cover strategic planning in higher education and in academic libraries. Those who work in administration in academic libraries and higher education would benefit from reading what other professionals have to say on strategic planning. The main themes of these articles are: the ultimate goal of these plans is communication and help the surrounding community understand the decision-making process by the organization, strategic planning usually comes from unforeseen circumstances, and lastly by allowing the library planning to be a part of the university-wide planning, it holds more importance to administrators. The importance of this volume to our work is what is being done today with strategic planning.