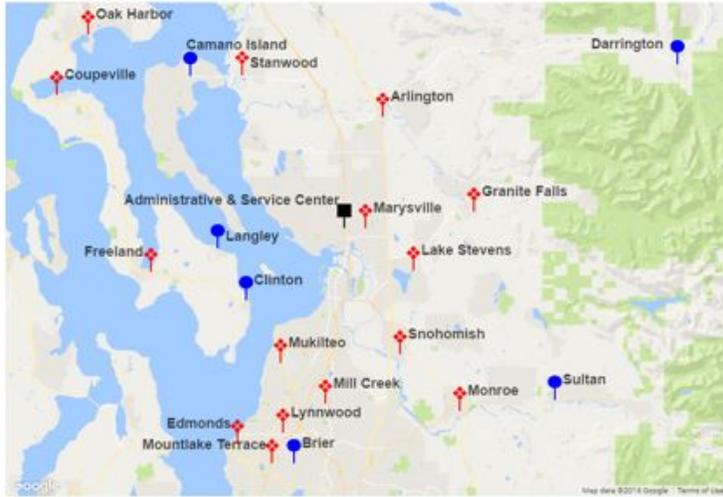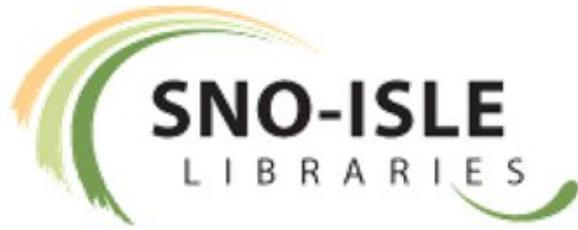# Got a Strategic Plan!
Now What?

Christa Werle, Sno-Isle Libraries (WA), cwerle@sno-isle.org

Lindsay Hanson, Sno-Isle Libraries (WA), lhanson@sno-isle.org

Who's here?

By the numbers

- 2 counties (2,260 square miles)
- 22 community libraries plus online services and Library on Wheels
- 450+ full- and part-time employees
- 743,540 district residents
- 1.5 million books, CDs, DVDs, and eBooks available
- $53m budget in 2017
- 7.3 million items borrowed in 2016

Project & Data Management "Department"
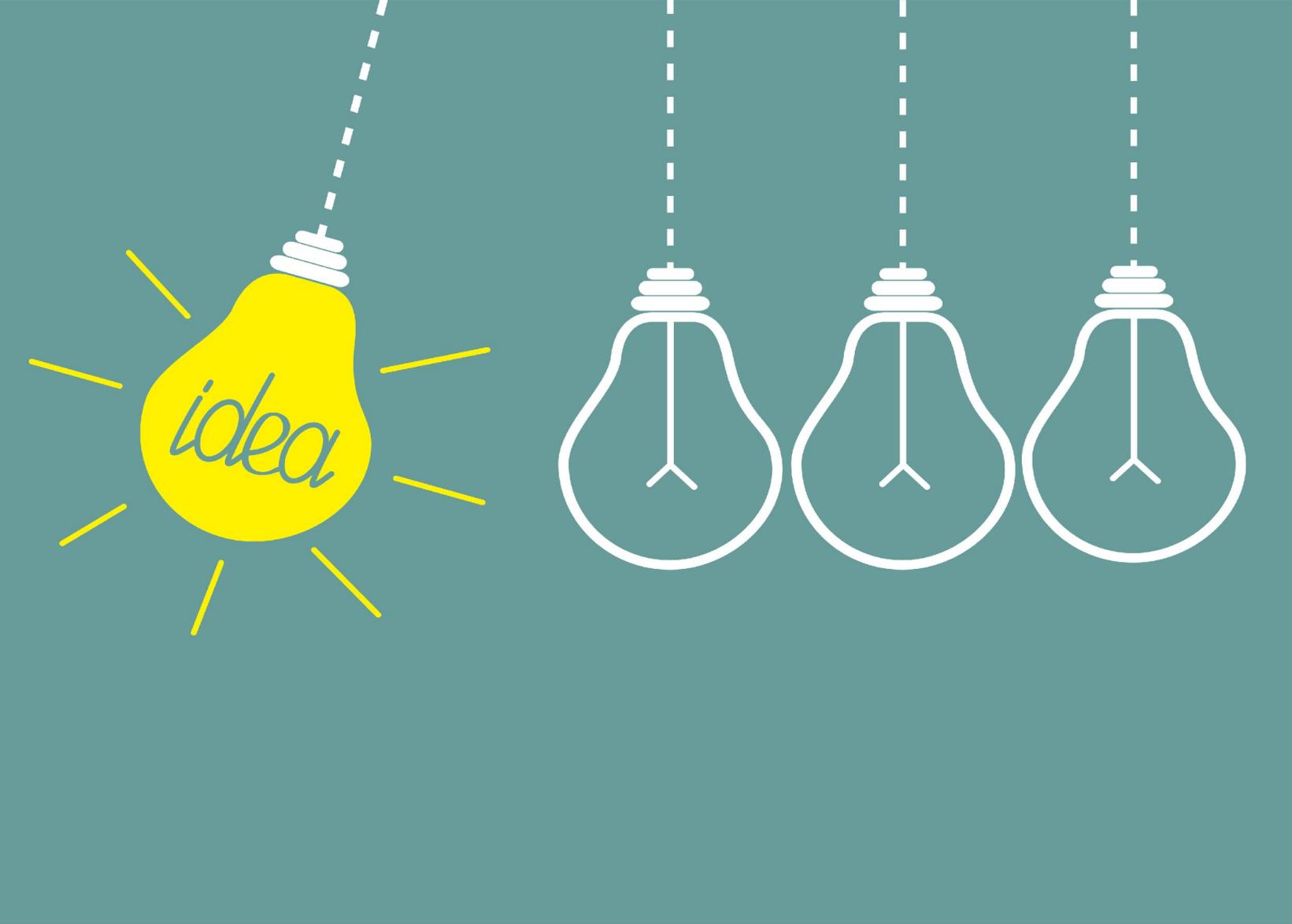
Public Services Project Manager

Data Analysis Librarian

Roles

Assist and support planning, evaluation, and decision-making by providing data and processes that align with our strategic plan:

- Following a logic model for evaluation planning
- Creating meaningful reporting
- Consulting on the decision-making process
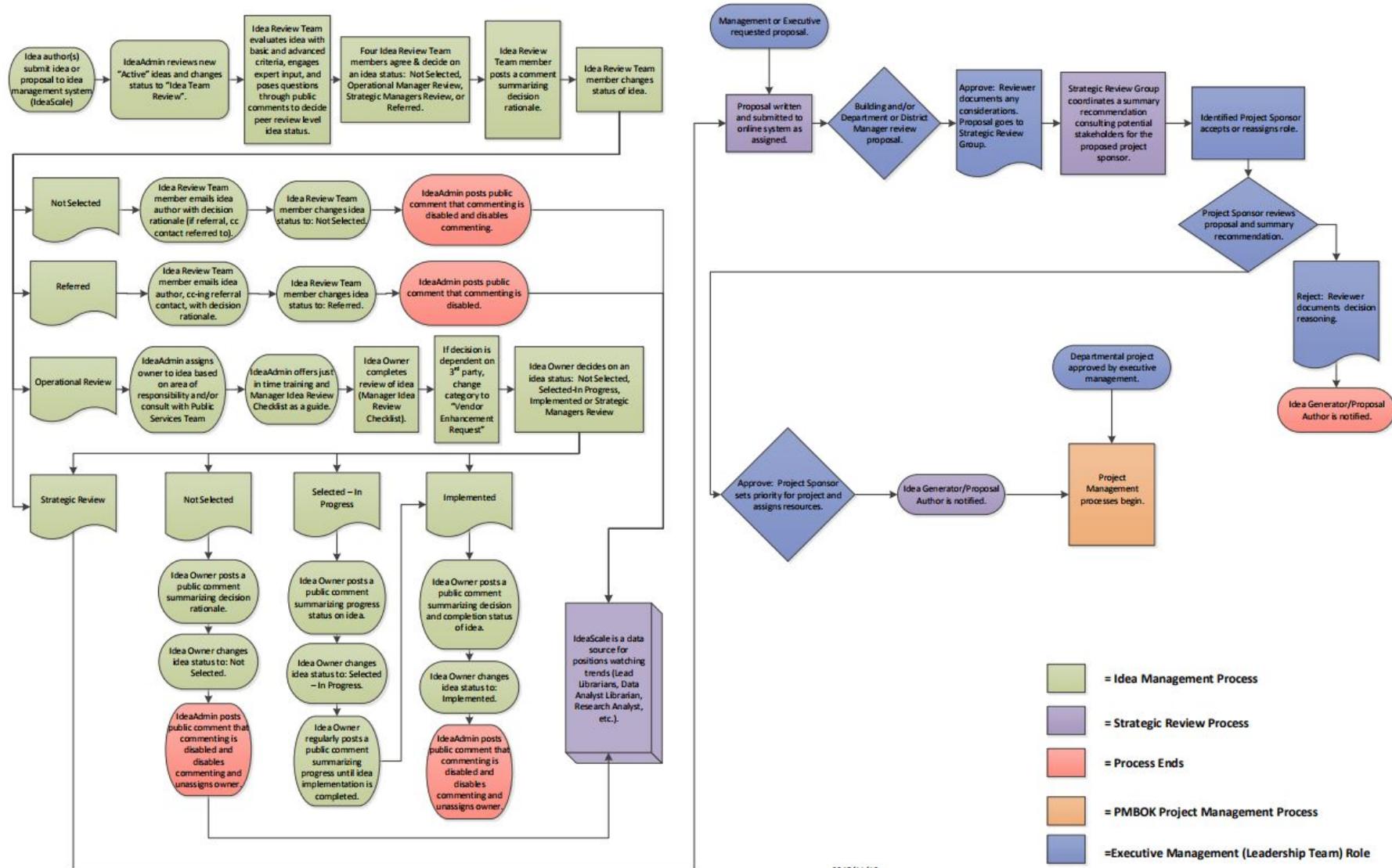- Being accessible

Ideas-first
vs.
Needs-first

"outcomes that really matter, such as better consumer health or greater financial well-being, cannot be achieved by single actions. Instead, they require a constellation of virtuous behaviors, sustained over lengthy periods of time."

~HBR, Dholakia, Utpal, 2016/4/15, "Why Nudging Your Customers Can Backfire".

Idea Management Process Map

Idea author(s) submit idea or proposal to idea management system (IdeaScale)

IdeaAdmin reviews new "Active" ideas and changes status to "Idea Team Review".

Idea Review Team evaluates idea with basic and advanced criteria, engages expert input, and poses questions through public comments to decide peer review level idea status.

Four Idea Review Team members agree & decide on an idea status: Not Selected, Operational Manager Review, Strategic Managers Review, or Referred.

Idea Review Team member posts a comment summarizing decision rationale.

Idea Review Team member changes status of idea.

Not Selected → Idea Review Team member emails idea author with decision rationale (if referral, cc contact referred to). → Idea Review Team member changes idea status to: Not Selected. → IdeaAdmin posts public comment that commenting is disabled and disables commenting.

Referred → Idea Review Team member emails idea author, cc-ing referral contact, with decision rationale. → Idea Review Team member changes idea status to: Referred. → IdeaAdmin posts public comment that commenting is disabled.

Operational Review → IdeaAdmin assigns owner to idea based on area of responsibility and/or consult with Public Services Team → IdeaAdmin offers just in time training and Manager Idea Review Checklist as a guide. → Idea Owner completes review of idea (Manager Idea Review Checklist). → If decision is dependent on 3rd party, change category to "Vendor Enhancement Request" → Idea Owner decides on an idea status: Not Selected, Selected-In Progress, Implemented or Strategic Managers Review

Strategic Review

Not Selected → Idea Owner posts a public comment summarizing decision rationale. → Idea Owner changes idea status to: Not Selected. → IdeaAdmin posts public comment that commenting is disabled and disables commenting and unassigns owner.

Selected – In Progress → Idea Owner posts a public comment summarizing progress status on idea. → Idea Owner changes idea status to: Selected – In Progress. → Idea Owner regularly posts a public comment summarizing progress until idea implementation is completed.

Implemented → Idea Owner posts a public comment summarizing decision and completion status of idea. → Idea Owner changes idea status to: Implemented. → IdeaAdmin posts public comment that commenting is disabled and disables commenting and unassigns owner.

IdeaScale is a data source for positions watching trends (Lead Librarians, Data Analyst Librarian, Research Analyst, etc.).

Management or Executive requested proposal.

Proposal written and submitted to online system as assigned.

Building and/or Department or District Manager review proposal.

Approve: Reviewer documents any considerations. Proposal goes to Strategic Review Group.

Strategic Review Group coordinates a summary recommendation consulting potential stakeholders for the proposed project sponsor.

Identified Project Sponsor accepts or reassigns role.

Project Sponsor reviews proposal and summary recommendation.

Reject: Reviewer documents decision reasoning.

Idea Generator/Proposal Author is notified.

Departmental project approved by executive management.

Approve: Project Sponsor sets priority for project and assigns resources.

Idea Generator/Proposal Author is notified.

Project Management processes begin.

Legend:
- = Idea Management Process
- = Strategic Review Process
- = Process Ends
- = PMBOK Project Management Process
- = Executive Management (Leadership Team) Role

2015/11/16

INTRANET

GO

Home | Form Locator | Policies | General Services & Help | Whom to Call | Site Map

Departments

Project Process Groups

- ▶ Administrative Services
- ▶ Communications
- ▶ Director & Board of Trustees
- ▶ Facilities
- ▶ Foundation
- ▶ General Services & Help
- ▶ Human Resources
- ▶ Policies
- ▶ Project & Data Management
  - • Current Projects
  - • Operational Reports
- ▶ Public Services
- ▶ Strategic Planning
- ▶ Technical Services (TS)
- ▶ Volunteer Program

Home > Project & Data Management > Project Process Groups

Printer Friendly

Project Process Groups

Initiating

Planning

Executing

Monitoring & Controlling

Closing

Next

Page reviewer: Christa Werle

Mental health needs 24%
Drug Addiction 18%
Lack of affordable housing 16%
Homelessness 13%
Lack of mid-range, living wage jobs 13%
Low literacy rates among children 9%
Poverty 7%

633
460
419
352
343
228
181

Mental health   Drugs   Housing   Homelessness   Living wages   Literacy   Poverty

County
☑ (All)
☑ Island
☑ Snohomish
☑ Other

Location
☑ (All)
☑ Arlington
☑ Bothell
☑ Brier
☑ Camano Island
☑ Clinton
☑ Coupeville
☑ Darrington
☑ Edmonds
☑ Everett
☑ Freeland
☑ Gold Bar
☑ Granite Falls
☑ Greenbank
☑ Index
☑ Island Co. UnInc
☑ Lake Stevens
☑ Lakewood
☑ Langley
☑ Lynnwood
☑ Marysville
☑ Mill Creek
☑ Monroe
☑ Mountlake Terrace
☑ Mukilteo
☑ Oak Harbor
☑ Other
☑ Snohomish
☑ Snohomish Co. UnInc
☑ Stanwood
☑ Sultan
☑ Woodinville

Strategic Plan

2017- 2019 Strategic Priorities

We will concentrate on:

- Increasing kindergarten readiness in language and literacy
- Building civic engagement to address community issues
- Strengthening our economy by supporting entrepreneurs and small business owners

Core Services

In keeping with our values and purpose, we:

- Sustain a diverse collection of materials in various formats
- Lend library materials
- Connect readers with books
- Provide access to computers and connectivity
- Deliver expert information and research assistance
- Present programs addressing community needs and interests
- Maintain safe, welcoming spaces

Values

We believe in:

- Each individual's right to free and equal access to information and ideas
- The worth and appreciation of diverse points of view
- The value of individuals, community, and culture
- The importance of innovation in meeting evolving customer needs and expectations
- Accountability for the public's resources

Purpose

We foster a literate and informed citizenry by:

- Providing equal access to the library and its resources for all
- Championing early literacy
- Supporting lifelong learning
- Providing space to think, meet, work, and create
- Convening people for public discourse

Our mission is to be a community doorway to reading, resources, and lifelong learning, and a center for people, ideas, and culture.

SNO-ISLE LIBRARIES

Decision-making

1. Identify the problem
2. Establish decision criteria
3. Weigh decision criteria
4. Generate alternatives
5. Evaluate the alternatives
6. Choose the best alternatives
7. Implement the decision
8. Evaluate the decision
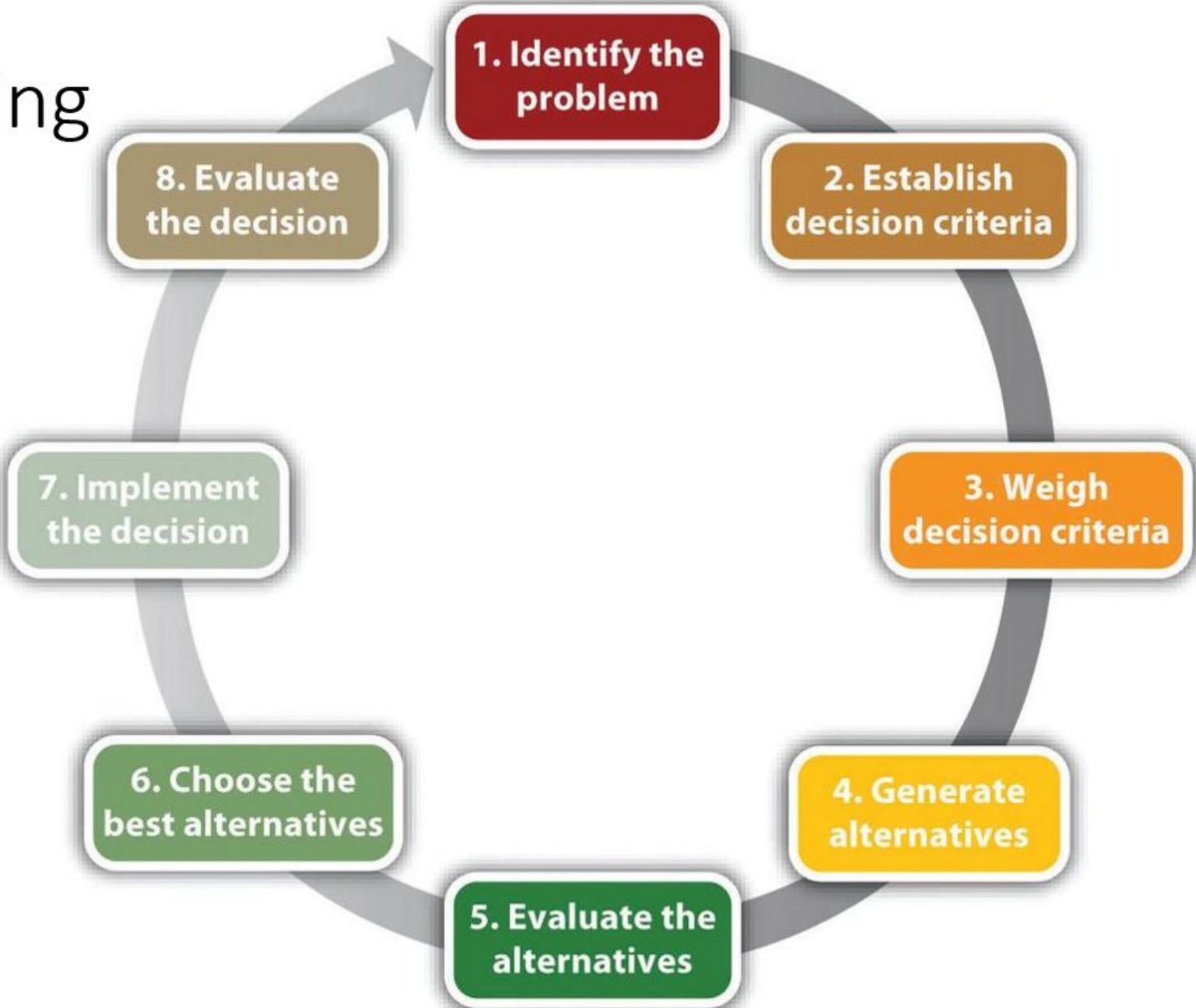
Data Guides Our Work

Strategic Plan

Baselines and Success Targets

Do good work* & measure it

Data viz to stay on track

*intentionally planned work with evidence of success or
has such potential for success to warrant a trial/pilot

Service Plan Example

Strategic Plan Impact:

Strengthening our economy by supporting entrepreneurs and small business owners

Target Audience:

- People considering starting a new business
- Small business owners who want to grow their business

Service Plan Example

Output/Outcome/Impact	Metric	2016 Baseline	2019 Success Target
Output	Number of people served through Book A Librarian	49	100
Output	Number of people served through programs	1312	1800
Output	Number of new business licenses reported	N/A	20/year
Output	Number of businesses that report benefit from SIL services	N/A	100%
Output	Business eResources monthly usage average - DemographicsNow	526	600
Output	Business eResources monthly usage average - ABI/INFORM Trade & Industry	164	250
Output	Business eResources monthly usage average - AtoZdatabases	2304	2500
Output	Business eResources monthly usage average - Lynda.com	8975	8975

Service Plan Example

Output/Outcome/Impact	Metric	2016 Baseline	2019 Success Target
Outcome	Entrepreneurs utilizing SIL services will start new businesses that generate enough revenue for an owner's salary within two years	N/A	70%
Outcome	Current business owners utilizing SIL services will grow their revenue	N/A	85%
Outcome	Small businesses with less than 100 employees in our region will have utilized SIL business services	N/A	20%
Outcome	Businesses utilizing SIL services will report generating revenue as a result of this contact	N/A	90%

Service Plan Example

Output/Outcome/Impact	Metric	2016 Baseline	2019 Success Target
Impact	Average taxable retail sales in our service area will continue to increase annually at 5% for Island County and 7% for Snohomish County	2014 Island Co. baseline - $789,563,406 2016 Snohomish Co. baseline - $2,394,676,951	Island Co. - $1,007,705,218 Snohomish Co. - $2,933,582,236
Impact	Unemployment rates remain below 5% in Snohomish County and 6.5% in Island County	Island Co. - 3.9% Snohomish Co. - 5.8%	Unemployment rates remain below 5% in Snohomish County and 6.5% in Island County

Programming Support & Evaluation:

- Nationally, investment in and attendance at public library programs is trending upward.

- In 2016, Sno-Isle Libraries invested approximately $1,130,000 of staff time and financial resources in our programming services.

- Programming in community needs and interests targeted in our strategic priorities is an opportunity to make a difference through core library services.

Service Plan - Programming

Strategic Plan Impact:

A literate and informed citizenry supported by educational programs addressing community needs and interests

Target Audience:

- Residents of Snohomish and Island Counties with needs and interests in lifelong learning, early literacy, STEM/STEAM education and public discourse
- Sno-Isle Libraries programming staff

Service Plan - Programming

Output/Outcome/Impact	Metric	2016 Baseline	2019 Success Target
Output	Number of programs meeting definition of an outcomes-based program	72%	100%
Output	Number of program attendees	221,080	221,080 (or 100% of previous year, watch measure)
Output	Percent of targeted staff trained in core curriculum	0	100%

Service Plan - Programming

Output/Outcome/Impact	Metric	2016 Baseline	2019 Success Target
Outcome	Customers immediately increase their knowledge	4.5	4.5
Outcome	Customers immediately increase their skill/ability	4.3	4.5
Outcome	Customers immediately feel more confident	4.4	4.5
Outcome	Customers immediately increase their knowledge of SIL resources	4.2	4.5
Outcome	Follow-up digital learning, education/lifelong learning, job skills - applied Awareness, applied knowledge, applied new skills, change in behavior and perceived value	83% 93% 92% 89% 84%	90% for all
Outcome	Staff measures of training component learning outcomes	N/A	90%

Program or Event?

A program is defined as a library hosted event that is designed with measurable customer outcomes in knowledge, awareness, behavior and skill (https://intranet.sno-isle.org/?ID=12963). All other library events are considered to be "Community Events" or "Group Meetings". Data for these visualizations are only available starting in July 2017.

Community Library Staff Self-Report

No
11.17%

Yes
88.83%
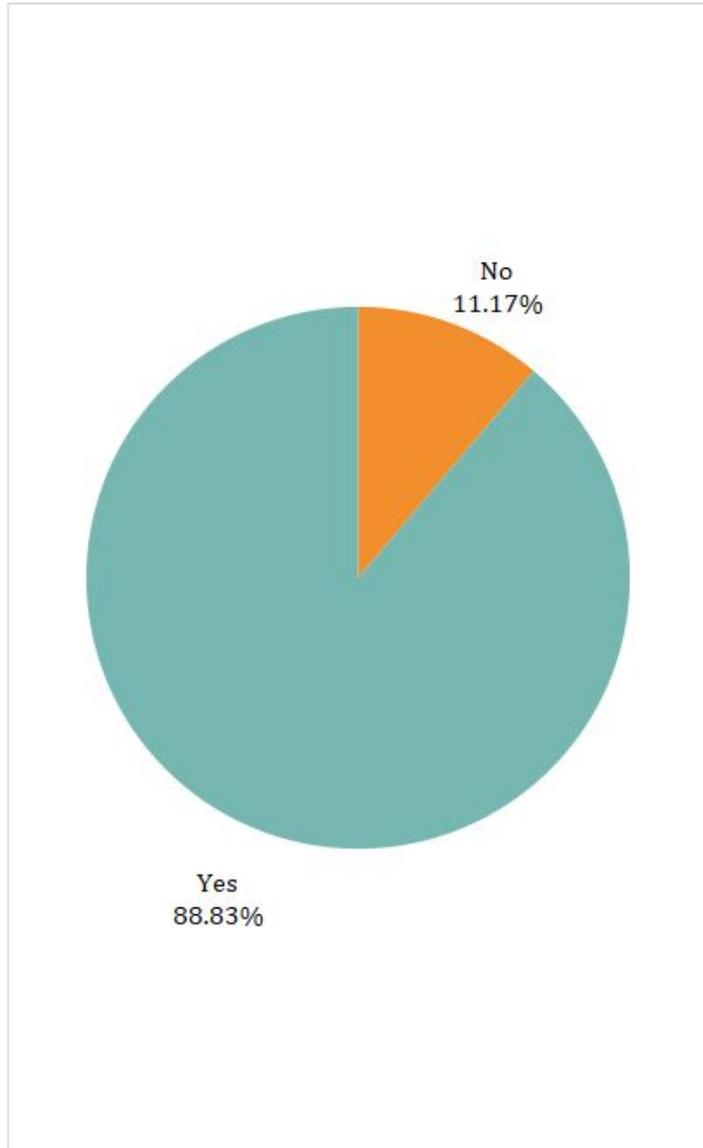
Program Service Area Alignment

Community Event or Group Meeting
9.11%

Program
90.89%
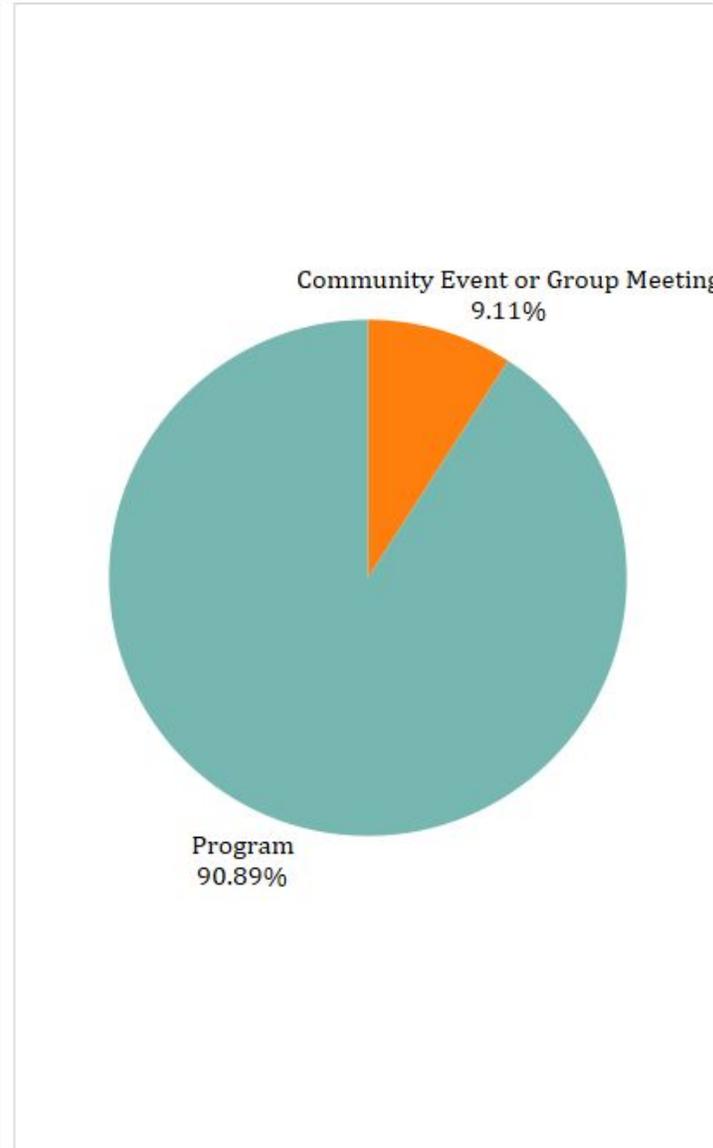
Community

- ☑ (All)
- ☑ Arlington
- ☑ Brier
- ☑ Camano Island
- ☑ Clinton
- ☑ Coupeville
- ☑ Darrington
- ☑ Edmonds
- ☑ Freeland
- ☑ Granite Falls
- ☑ Greater Everett
- ☑ Lake Stevens
- ☑ Lakewood-Smo...
- ☑ Langley
- ☑ Lynnwood
- ☑ Mariner
- ☑ Marysville
- ☑ Mill Creek
- ☑ Monroe
- ☑ Mountlake Ter...
- ☑ Mukilteo
- ☑ Oak Harbor
- ☑ Snohomish
- ☑ Stanwood
- ☑ Sultan

Total Attendance at Programs
1/1/2017 - 8/17/2017
Use the filters on the right to narrow down the programs you see
* means more than one option was indicated

Tech Fest
27

Lego Robotics
17

Winter Science Extravaganza: Rockin'

Shrinky Dink Charm Fun
15

Lego Club Free Play

Explore Summer: Look Up to the Stars with Kevin Manning
25

See the Sun Up Close
34

Drop-In Scratch Programing
20

Pioneer Birthday Bash
8

Explore Summer
66
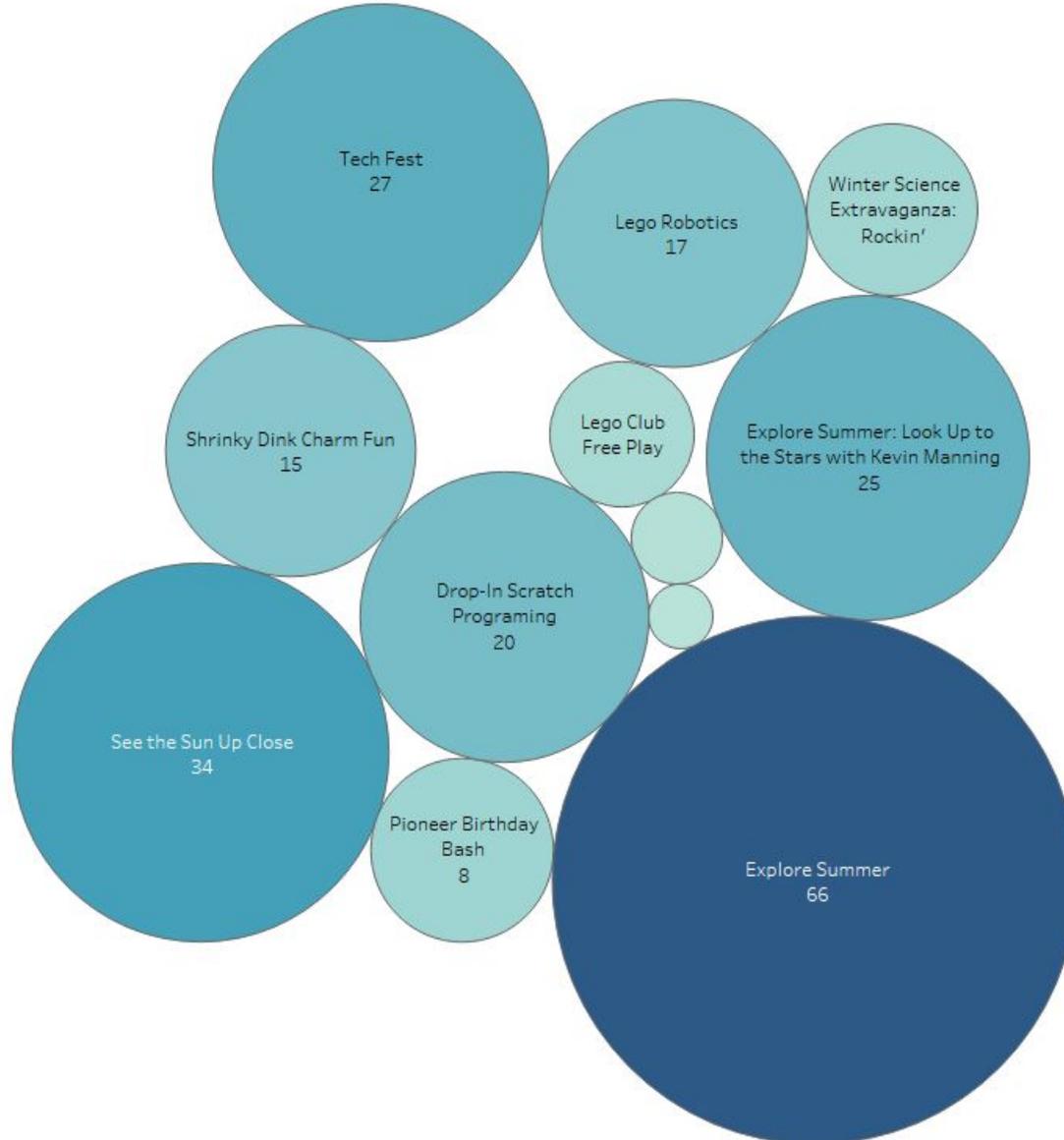
Library
(All)
Arlington
Brier
Camano
Clinton
Coupeville
☑ Darrington
Edmonds
Freeland

Initiative
(All)
Civic Engagement
Digital Literacy
Early Learning
Readers' Services
School Partners...
Small Business / ...
☑ STEAM
Workforce Readi...

Type
☑ (All)
☑ Class / Instruction
☑ Film
☑ Informational Pr...
☑ Library Tour / Visit
☑ School Group (P...
☑ Storytime
☑ Storytime w/ Pla...
☑ Youth Program (...

Target Audience
☑ (All)
☑ Babies (0 to 18 ...
☑ Toddlers (19 to ...
☑ Preschoolers (3-5)
☑ Elementary / Ear...
☑ Tweens (10-12)
☑ Teens (13-17)
☑ Families
☑ Adults (18+)

Number of Programs in each Service Area

Early Literacy
45.25%

Education & Lifelong Learning
22.11%

Civic Engagement

Community Event
13.05%

Job Skills
2.91%

Digital Learning
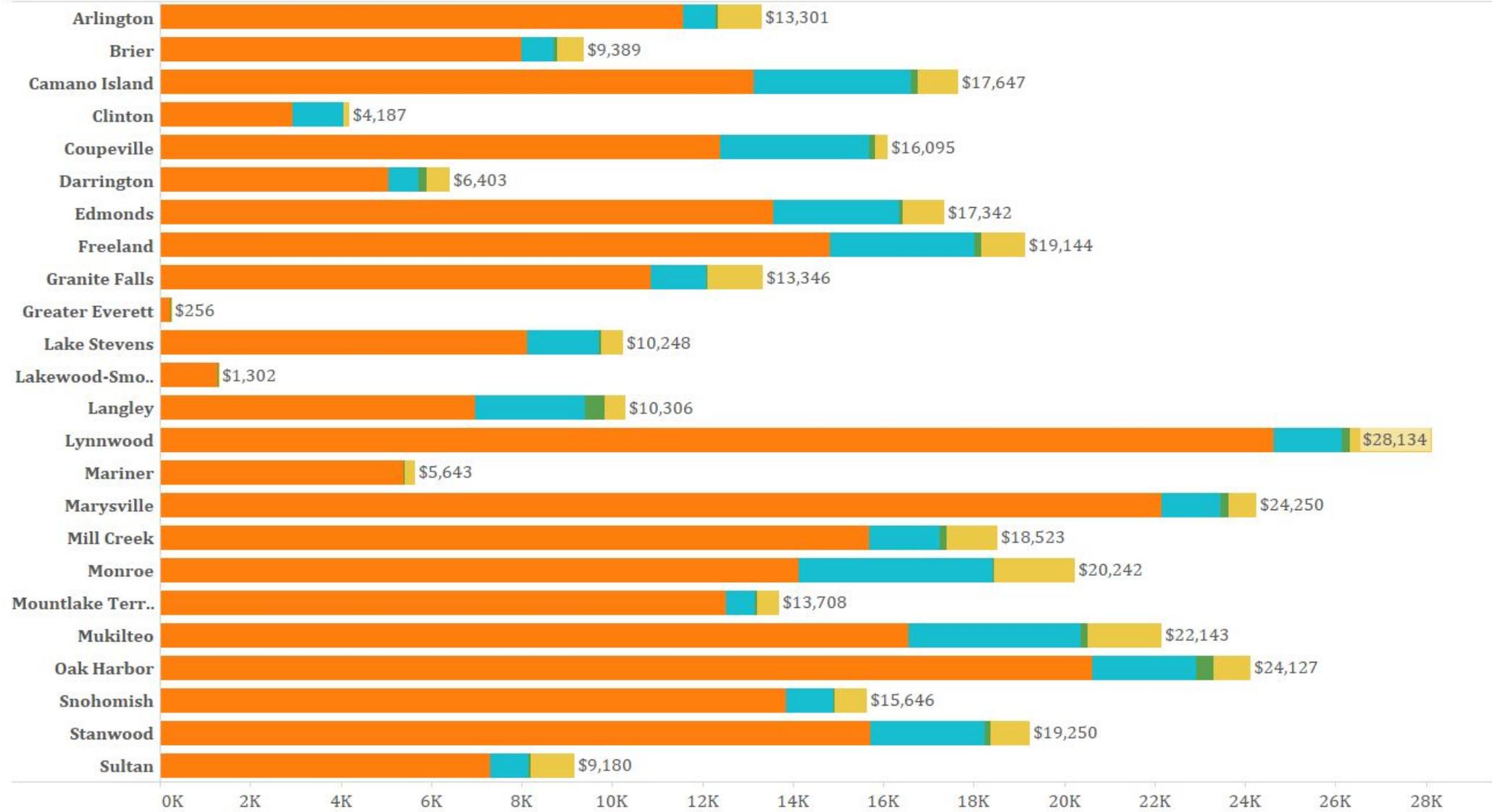6.42%

Connecting with Books
5.56%

Small Business &

Total Program Costs

July 2016- $87,306 for 413 programs (78% is staff time)
October 2016 - $89,711 for 757 programs (83% is staff time)
April 2017 - $77,957 for 589 programs (87% is staff time)
July 2017 - $84,823 for 582 programs (79% is staff time)

Branch	Total
Arlington	$13,301
Brier	$9,389
Camano Island	$17,647
Clinton	$4,187
Coupeville	$16,095
Darrington	$6,403
Edmonds	$17,342
Freeland	$19,144
Granite Falls	$13,346
Greater Everett	$256
Lake Stevens	$10,248
Lakewood-Smo..	$1,302
Langley	$10,306
Lynnwood	$28,134
Mariner	$5,643
Marysville	$24,250
Mill Creek	$18,523
Monroe	$20,242
Mountlake Terr..	$13,708
Mukilteo	$22,143
Oak Harbor	$24,127
Snohomish	$15,646
Stanwood	$19,250
Sultan	$9,180

Position
- ☑ (All)
- ☑ Assistant Managing Libr...
- ☑ Branch Circulation Supe...
- ☑ Branch Manager
- ☑ District Manager
- ☑ Early Learning Coordina...
- ☑ Information Assistant

Staff Name
- ☑ (All)
- ☑ Abby Bormann
- ☑ Alisa Erickson-Chongrak
- ☑ Almira Jones
- ☑ Alyssa Sampson
- ☑ Amanda Albert
- ☑ Andie Boyle

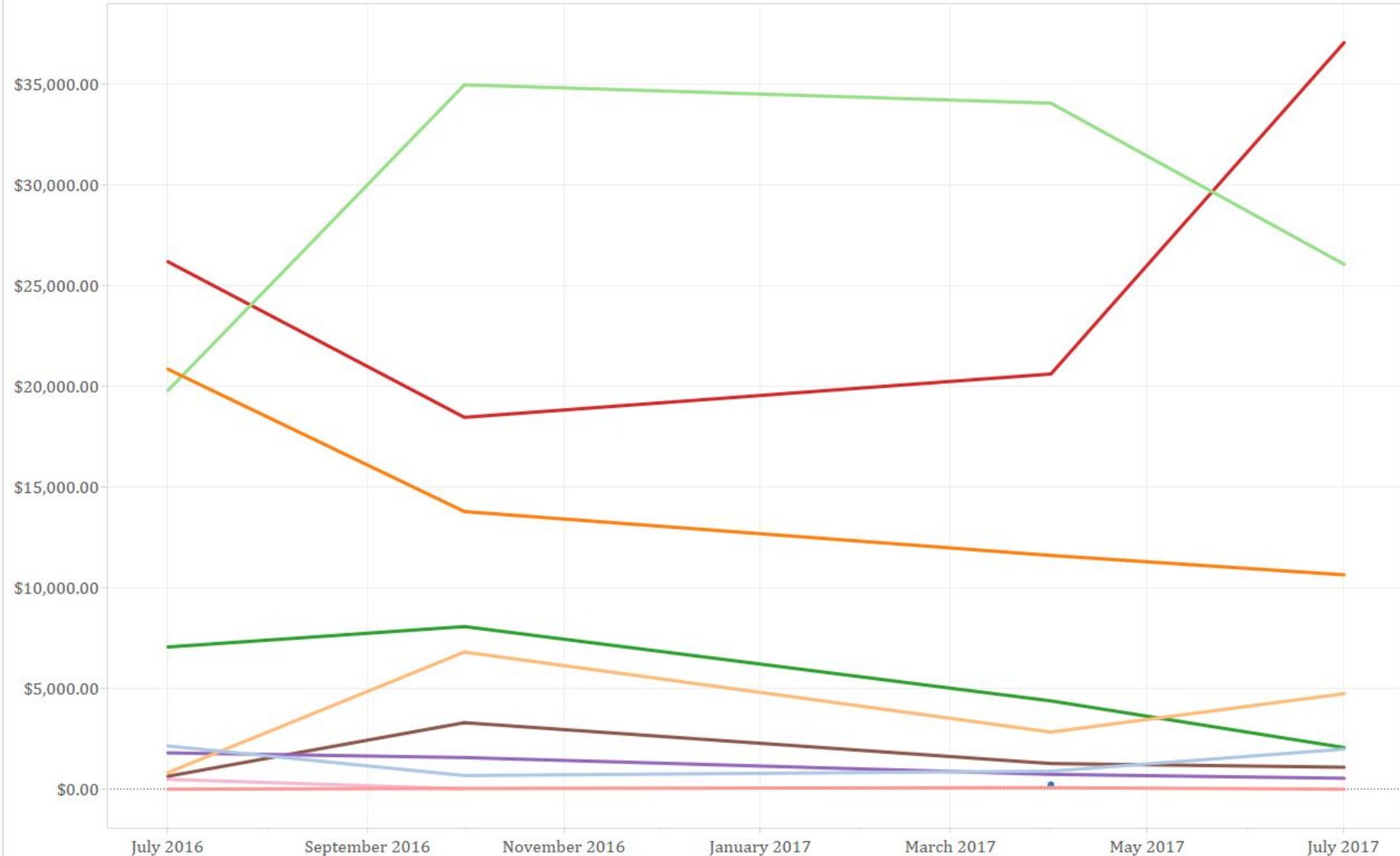**Programming Service Area**
- ☑ (All)
- ☑ Civic Engagement
- ☑ Community Event
- ☑ Connecting with Books
- ☑ Digital Learning
- ☑ Early Literacy
- ☑ Education & Lifelong Le...

Input Review Date
- ☑ (All)
- ☑ July 2016
- ☑ October 2016
- ☑ April 2017
- ☑ July 2017

Programming Costs
- ▪ Materials
- ▪ Mileage
- ▪ Presenter(s)
- ▪ Staff Time

Cost of Programs in Each Service Area

This visualization shows total programming costs (staff time, presenter fees, materials and mileage reimbursement) in each service area over time.

Position
- ☑ (All)
- ☑ Assistant Managing Librarian
- ☑ Branch Circulation Supervisor
- ☑ Branch Manager
- ☑ District Manager
- ☑ Early Learning Coordinator
- ☑ Information Assistant
- ☑ LA II

Staff Name
- ☑ (All)
- ☑ Abby Bormann
- ☑ Alisa Erickson-Chongrak
- ☑ Almira Jones
- ☑ Alyssa Sampson
- ☑ Amanda Albert
- ☑ Andie Boyle
- ☑ Angela Bivona

Programming Service Area
- ☑ (All)
- ☑ Civic Engagement
- ☑ Community Event
- ☑ Connecting with Books
- ☑ Digital Learning
- ☑ Early Literacy
- ☑ Education & Lifelong Learning
- ☑ Group Meeting

Programming Service Area
- Civic Engagement
- Community Event
- Connecting with Books
- Digital Learning
- Early Literacy
- Education & Lifelong Learning
- Group Meeting
- Job Skills
- Small Business & Entrepren...

project | OUTCOME
MEASURING THE TRUE IMPACT
OF PUBLIC LIBRARIES

Dashboard Home   Build Report   Overview   Matrix   **Detail**   Map   Library Info

Sno-Isle Libraries   ⌄ All Libraries
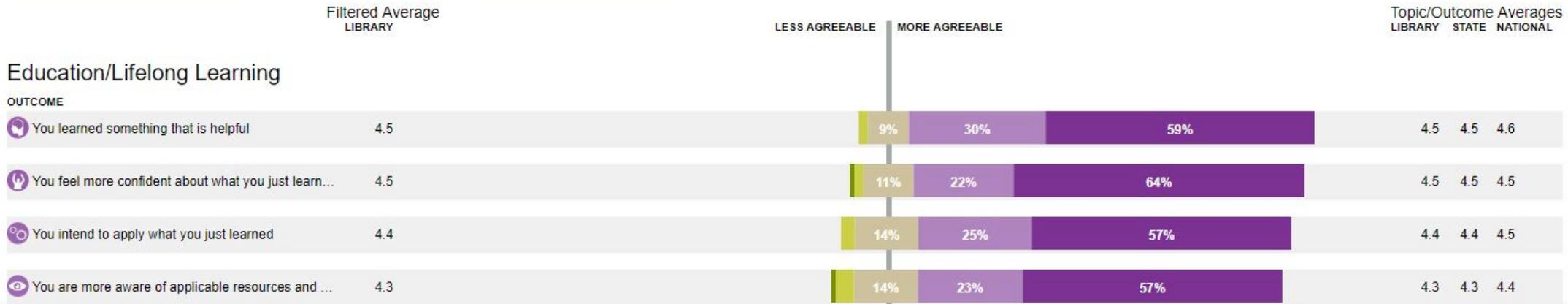
IMMEDIATE SURVEY   FOLLOW UP SURVEY

The number of responses in each Likert category are displayed below for each specific survey question. Use the controls below to filter, order and group responses by available options. Click questions to see the open response answers corresponding with the corresponding surveys.

N/A responses are not included in charts or percentage calculations.

Filter & Expo

RESPONSES BY SERVICE OR PROGRAM TYPE AND DOMAIN

FILTER BY ▶   OUTCOME ▾   **EDUCATION/LIFELONG LEARNING ▾**   PROG. NAME ▾   DATE ▾   SCORING ■ Strongly Disagree ■ Disagree ■ Neither Agree Nor Disagree ■ Agree ■ Strongly Agree
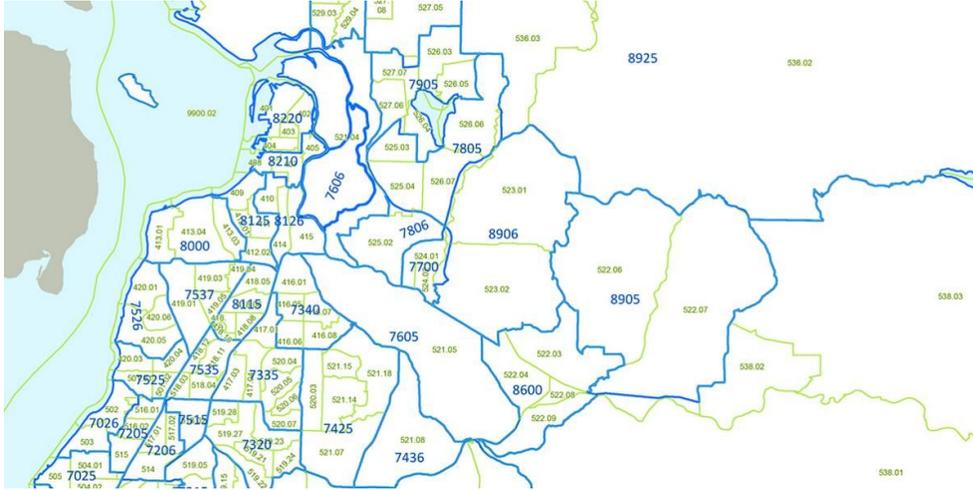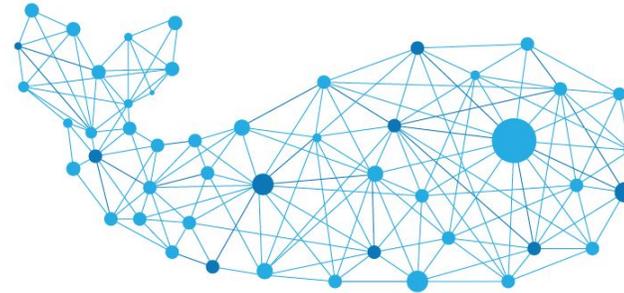
	Filtered Average LIBRARY	LESS AGREEABLE	MORE AGREEABLE		Topic/Outcome Averages LIBRARY STATE NATIONAL

Education/Lifelong Learning

OUTCOME

	Filtered Average LIBRARY	Less/More Agreeable	LIBRARY	STATE	NATIONAL
👤 You learned something that is helpful	4.5	9% / 30% / 59%	4.5	4.5	4.6
👤 You feel more confident about what you just learn...	4.5	11% / 22% / 64%	4.5	4.5	4.5
👥 You intend to apply what you just learned	4.4	14% / 25% / 57%	4.4	4.4	4.5
👁 You are more aware of applicable resources and ...	4.3	14% / 23% / 57%	4.3	4.3	4.4

Changes as a result of data

OPEN _____ to _____

Analyze
Reason
Infer
Critical Thinking
Generate
Evaluate
Interpret

Issues that Matter:
Homelessness Here

What's next

DATA CULTURE

All measurements are flawed

"To throw our hands up and say, 'But we cannot measure performance in the social sectors the way you can in business' is simply lack of discipline. All indicators are flawed, whether qualitative or quantitative. Test scores are flawed, mammograms are flawed, crime data are flawed, customer service data are flawed, patient-outcome data are flawed. **What matters is not finding the perfect indicator, but settling on a consistent and intelligent method of assessing your output results and then tracking your trajectory with rigor**."

Jim Collins, *Good to Great and the Social Sector*, 2005
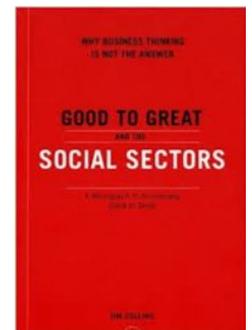
Begin with the end in mind.

~Stephen Covey

Q & A

Christa Werle, Sno-Isle Libraries (WA), cwerle@sno-isle.org

Lindsay Hanson, Sno-Isle Libraries (WA), lhanson@sno-isle.org