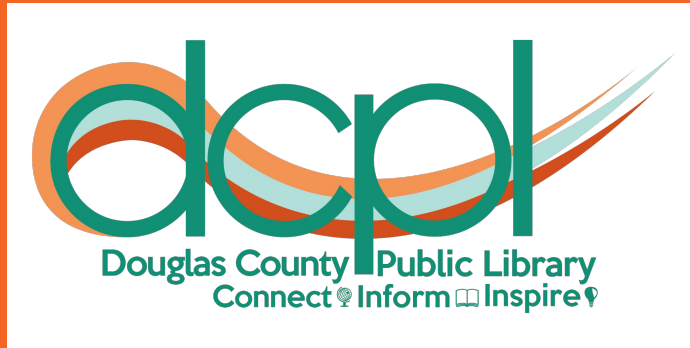## Sample Questions for Library Consultants

| Sample interview questions | Themes/Subjects |
|---|---|
| Tell us about your experience working with libraries in developing strategic plans.<br><br>Have you had experience developing vision statements and values statements? | ➢ Experience with libraries<br>➢ Establishing vision and values |
| How do you identify and recommend key performance indicators?<br><br>How do you interpret data from existing key performance indicators?<br><br>How do you go about organizing and presenting data?<br><br>How do you collate and present data in a way that board members can use to make data-informed decisions? | ➢ Data gathering and analysis<br>➢ Identifying underserved groups<br>➢ Aligning data with plan development |
| Walk us through your process conducting a SWOT analysis.<br><br>What are some data points you would gather from a SWOT analysis? | ➢ Data gathering and analysis<br>➢ SWOT analysis<br>➢ Group management skills |
| How do you navigate conversations when you hear both negative and positive feedback? How do you mediate those types of conversations?<br><br>One of our goals with the strategic planning process is to strengthen our image and relationship with our community. What can you do to help us reach this goal?<br><br>Can you give us an example of a time when you worked with a group of people who had different perspectives/styles? How did you ensure all voices were heard? How did you incorporate this into decision making? | ➢ Relationship building/communication<br>➢ Navigating supporters and critics<br>➢ Information about the local region<br>➢ Communication skills and listening skills<br>➢ Collaboration with library board |
| Tell us about your preferred approach to working with a board on developing a strategic plan. What level of independence do you prefer? What do communications look like? | ➢ Independent direction |
| Can you provide us with a list of references of libraries and organizations for whom you have conducted strategic planning processes and written strategic plans? | ➢ Credentials/ References |

Douglas County Public Library
Board of Trustees Special Meeting
06/08/21 Supplemental Material

# Strategic Plan Proposal

**CIVIC**Technologies

Tuesday, June 8, 2021

**Marc** Futterman
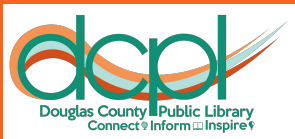
# We love preparing library strategic plans

Strong Nevada library knowledge and experience

Well organized, creative and pragmatic

Data-driven and customer-focused

Address both underserved communities and high-volume users

Interactive working approach with staff

Combine demographic/market segmentation data with library usage data

Utilize both strategic framework and detailed logic models

Develop four essential elements: market, organization, staff, and partners

Play multiple roles: facilitate, catalyze, strategize, and produce

# About us

*Our reach:* 115 + public library clients across 31 states serving 52.8 million people with $2.06 billion aggregate annual client budgets.

## Planning solutions

Service planning, marketing/brand planning, facilities planning, capital budget planning, strategic planning, collective action planning, community needs assessment, and usage and customer analytics.

Expertise in predictive modeling, market segmentation, service development and business consulting.

## Local engagement, branding and marketing solutions

Engagement including public forums, stakeholder interviews, focus groups, and telephone and online surveys.

Marketing, brand planning, and development.

## Organizational development solutions

Executive development and coaching.

Organizational strategies, structure, capacity, workflows and processes, and risk/reward.

Staff training and skills development, career development, and implementation feedback

Implementation support including performance metrics and monitoring.

## Software-as-a-service and custom software applications

GetACardMap

CommunityConnect

BusinessDecision

# Selected Client List

**Selected public and cooperative library systems**

Allegheny County Library Association (PA)

Anythink Libraries (CO)

Atlanta Fulton Public Library System (GA)

Brown County Library (WI)

Capital Area District Library (MI)

Chapel Hill Public Library (NC)

Columbus Metropolitan Library (OH)

Contra Costa County Library (CA)

County Of Los Angeles Public Library (CA)

Dallas Public Library (TX)

Denver Public Library (CO)

Deschutes County Library (OR)

District Of Columbia Public Library (DC)

Fairfax County Public Library (VA)

Free Library Of Philadelphia (PA)

Gail Borden Library District (IL)

Glendale Public Library (CA)

Grand Rapids Public Library (MI)

Greensboro Public Library (NC)

Gwinnett County Public Library System (GA)

Henderson Libraries District (NV)

Houston Public Library (TX)

Huntsville-Madison County Public Library (AL)

King County Library System (WA)

Las Vegas-Clark County Library District (NV)

Lee County Library System (FL)

Metropolitan Library System (OK)

Milwaukee Public Library (WI)

North Las Vegas Library District (NV)

Nashville Public Library (TN)

Oakland Public Library (CA)

Omaha Public Library (NE)

Pierce County Library System (WA)

Pioneer Library System (OK)

Queens Borough Public Library (NY)

San Antonio Public Library (TX)

San Diego Public Library (CA)

Santa Clara County Library District (CA)

Skokie Public Library (IL)

Solano County Library (CA)

Spokane Public Library (WA)

Springfield-Greene County Library District (MO)

St. Joseph County Library (IN)

Suffolk County Library System (NY)

Topeka and Shawnee Co Public Library (KS)

Washington Co Coop Library Services (OR)

Washington County Library (MN)

Wichita Public Library (KS)

Virginia Beach Public Library (VA)

**Federal and state libraries**

Institute of Museum and Library Services (IMLS)

State libraries: Colorado, Michigan, Nevada, and Texas

**Private sector contracts / collaborations**

Baker and Taylor/Bibliostat/Collection HQ

Bowker

Brodart

Demco

Ebsco and Novelist

Library Journal

Polaris

The Library Corporation

**Industry associations, papers, and presentations**

American Library Association

Chief Operating Officers of State Libraries

California Library Association

Computers in Libraries

Library Information and Technology Association

Illinois Library Association

Nevada Library Association

North Carolina Library Association

Public Library Association

Urban Libraries Council

Washington Library Association

# Nevada public library clients



Henderson District Libraries Strategic Plan

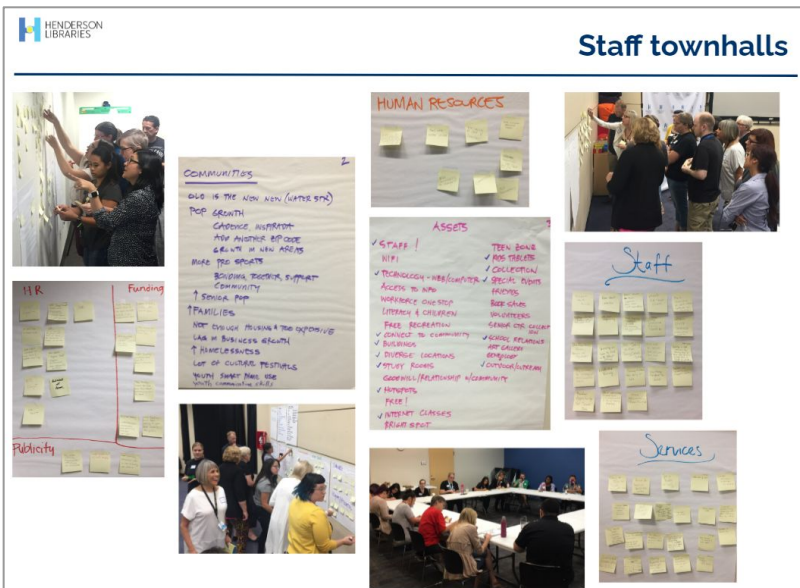Las Vegas-Clark County Library District Strategic Plan

Las Vegas-Clark County Library District Facilities Master Plan

Las Vegas-Clark County Library District Marketing and Communications Plan

Nevada State Library, Archives, and Public Records -- all NV public libraries

North Las Vegas Strategic Plan

Washoe County Library Staff Day Segmentation Workshop
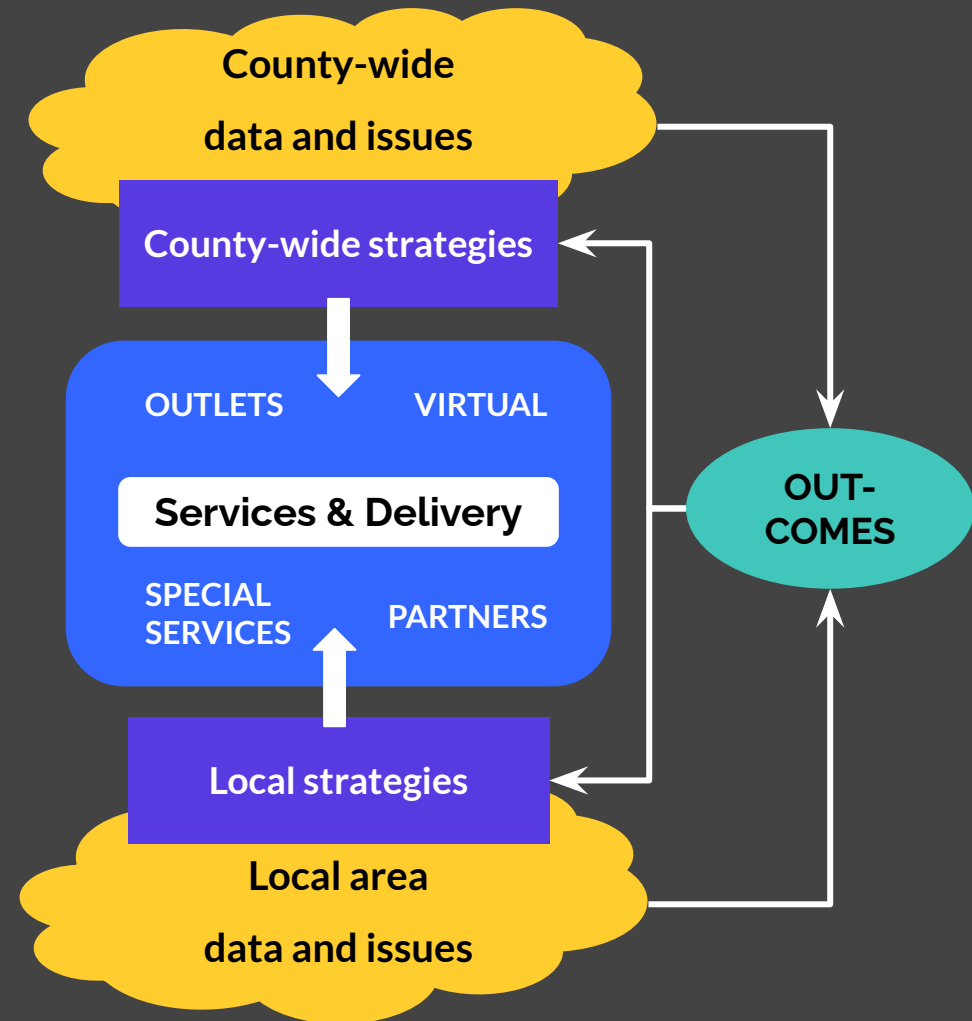
## Customer & data-driven

We take a page out of the private sector book

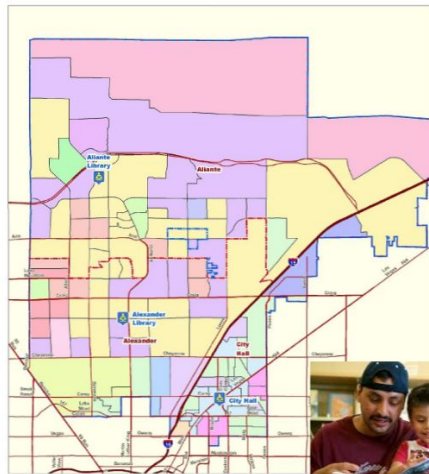Using data, we're helping libraries move to a market or demand-based approach

Demand based is market oriented and customer driven

**Customer driven =
tailoring services for your
customer's needs, interests, and
concerns**

## Top down/bottom up



County-wide
data and issues

County-wide strategies

OUTLETS        VIRTUAL

Services & Delivery

SPECIAL
SERVICES        PARTNERS

OUT-COMES

Local strategies

Local area
data and issues

## Our customers and priority markets

NORTH LAS VEGAS LIBRARY DISTRICT

### Target groups

**Families with children**
222,000 people (92%)

**Other**
16,000 people (7%)

**Seniors**
4,000 people (1%)

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HENDERSON LIBRARIES

# Strategy framework



Scenario:
**Growth**

Customer & Demand Driven Services

Vision:
One Henderson

Mission:
Imagine Possibilities
Discover Opportunities
Connect with Our Community

Market Strategies: Core Services · Out of School Learning · Culture and Creativity

Partnership Strategies: Friends Development · Foundation Rebuild · City Alignment · County Alignment

Organizational Strategies: One Library · Service Innovation · Growing Leaders

---

HENDERSON LIBRARIES

# Out of School Learning **Investment Overview**

Two investments will be made in this strategy

| Item | Investment | Investment |
|---|---|---|
| Investment Name | **School Support** | **Interest Driven Learning** |
| Strategy Prioritization | First | Second |
| Description | Resources and services focused on pre-K, grade level reading, and STEAM, including formal and informal educational support. | Support a broad range of adult learning including higher education, career development, information referral, and 21st century literacies and skills (e.g., digital, financial, health, and media). |
| Outcome | Children who love to learn and are prepared to learn in school with educational gaps closed. | Adults who love to learn and are prepared for ever-changing careers. |
| What We Promise | Resources and expertise to help kids be ready to start school, read at grade level, excel at STEAM, and otherwise close the educational gap. | Resources and expertise to help adults achieve accreditation, career development certifications, online degree programs; and to engage in informal learning, in libraries, online, and with partners. |
| How We Define Success | • Children ready for kindergarten.<br>• Children reading at grade level by third grade.<br>• More students are going to college, credentialing programs, and the workplace. | • Adults engaged in career development and change.<br>• Adults engaged in informal learning. |

---

NORTH LAS VEGAS LIBRARY DISTRICT

# Market segmentation discerns the difference between how people appear vs how they behave

| | How people look | | How people act | |
|---|---|---|---|---|
| | **Demographics** | **Lifestage** | **Needs** | **Attitudes** |
| | Married couple<br>Household Income $125,000 | Two kids under 10<br>Both parents work | Looks for new menu ideas<br>Value oriented menus<br>Cooking club member | Value shopper<br>Prefers low fat products<br>Enjoys cooking |
| | Married couple<br>Household Income $125,000 | Two kids under 10<br>Both parents work | Ready-to-eat products<br>Pre-cooked entrees<br>Home grocery delivery services | Convenience shopper<br>Prefers organic foods<br>Doesn't enjoy cooking |

Who are our best customers?

What are they like?

How do we communicate with them?
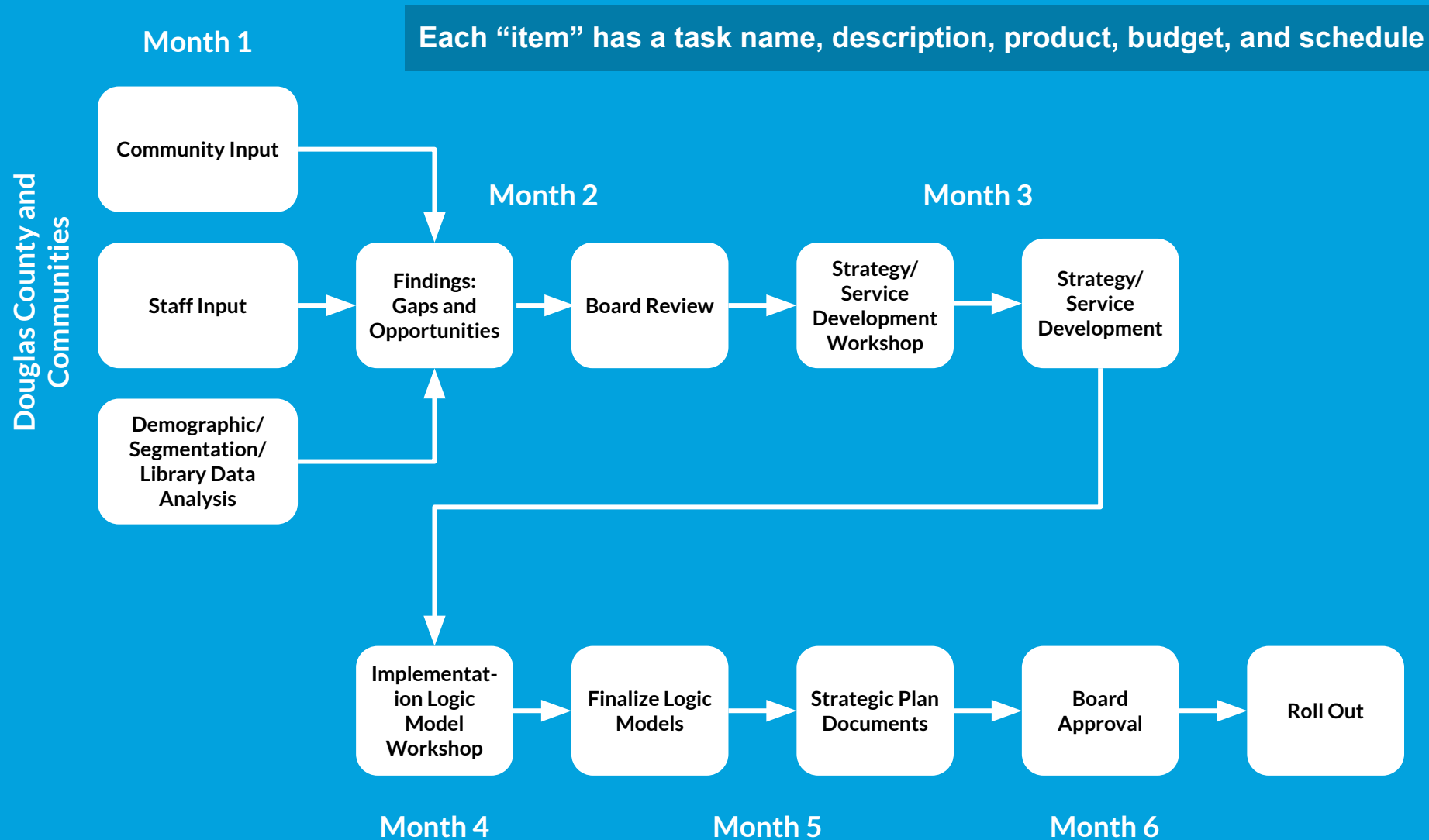
Where can we find more like them?

Align strategies and resources
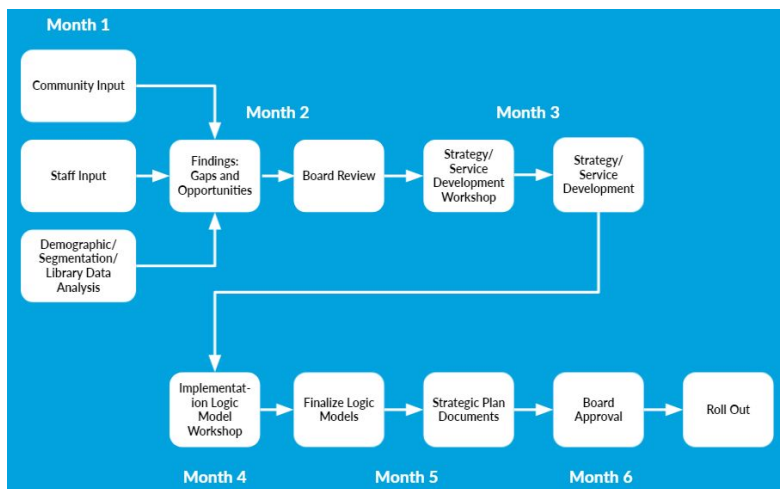
Robust to reveal customer differences

Be a data-driven, evidence-based organization

Paints a picture of the customer that informs organizational level decisions

Understand the complexity and landscape of customer households

# Road Map

**Month 1**

Each "item" has a task name, description, product, budget, and schedule

**Douglas County and Communities**

- Community Input
- Staff Input
- Demographic/ Segmentation/ Library Data Analysis

Findings: Gaps and Opportunities

**Month 2**

Board Review

**Month 3**

Strategy/ Service Development Workshop

Strategy/ Service Development

Implementation Logic Model Workshop

Finalize Logic Models

Strategic Plan Documents

Board Approval

Roll Out

**Month 4**       **Month 5**       **Month 6**

# Our Proposal: Task Language

## Task 6: Library Board Review and Input (web)

We'll prepare a brief presentation to the Library Board. We'll work with the Leadership Team to refine the presentation. The presentation will summarize the work to date focusing on observations, findings, and gaps and opportunities including key issues and areas of focus for strategic planning. We'll engage the Board in an interactive work session soliciting their thinking. We'll make the presentation to the Library Board. We'll debrief the meeting with the Library.

Product: Library Board presentation, meeting, and debrief.

## Task 7: Strategy and Service Development Workshop

### Task 7.1: Prepare Draft Scenarios/Review with Library

The purpose of this task is to prepare initial planning scenarios (scenarios are broad ideas or themes about the role and purpose of the Library serving its constituents as a whole; and, within that, serving multiple and diverse locales and segments). These themes are positioned within the context of a vision about Douglas County and what we collectively think the future holds for the Library and County. We'll prepare a memo describing possible futures and corresponding service/segment themes and submit it to the Library for review and then make revisions.

Building upon the scenarios, we'll outline the strategic direction (where we're going), the strategic framework (what we'll do), the service strategies (how we'll get there), and the investments needed (resources we need to do it). We'll focus on the unique residential market segments. We'll build this story utilizing logic models that correlate strategies, framework, services, investments, and segments. We'll prepare a draft memo and submit it to the Library for review and then make revisions.
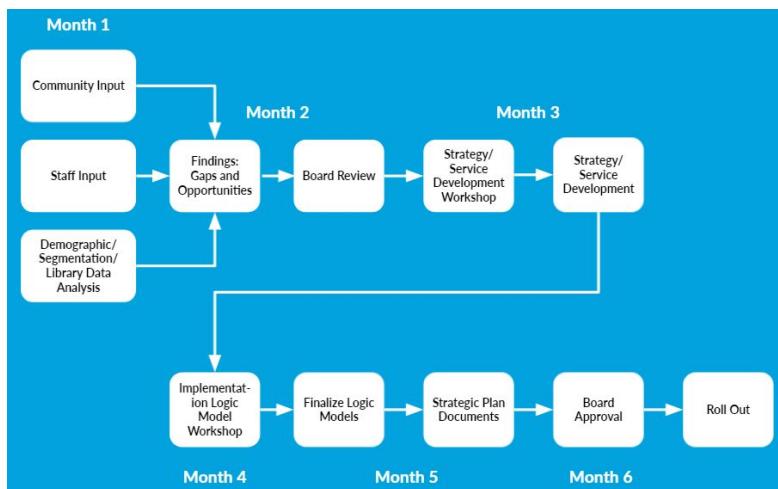
Product: Scenario and strategies memo.

### Task 7.2: Hold Workshop On-Site

We'll start this one-day workshop by confirming the scenario (vision and context). Then, utilizing the memo prepared above, we'll work interactively with participants to develop the strategic direction for the Library, strategic framework, service strategies, and investments. The workshop will also address organizational impacts and staff skills and behaviors that will be needed to meet community needs in light of the strategic direction, framework, and services.

Product: Workshop.

# Our Proposal: Deliverables



*Month 1 — Month 6 process flow: Community Input, Staff Input, Demographic/Segmentation/Library Data Analysis → Findings: Gaps and Opportunities → Board Review → Strategy/Service Development Workshop → Strategy/Service Development; Implementation Logic Model Workshop → Finalize Logic Models → Strategic Plan Documents → Board Approval → Roll Out*

- Alignment with community needs including target market segments

- Strategy framework

- Market (community) strategies

- Organizational and staff development strategies

- Partnership strategies

- Implementation "logic models" -- see below

- Implementation rollout discussion



### HENDERSON LIBRARIES — Out of School Learning Investment Overview

Two investments will be made in this strategy

| Item | Investment | Investment |
|---|---|---|
| Investment Name | School Support | Interest Driven Learning |
| Strategy Prioritization | First | Second |
| Description | Resources and services focused on pre-K, grade level reading, and STEAM, including formal and informal educational support. | Support a broad range of adult learning including higher education, career development, information referral, and 21st century literacies and skills (e.g., digital, financial, health, and media). |
| Outcome | Children who love to learn and are prepared to learn in school with educational gaps closed. | Adults who love to learn and are prepared for ever-changing careers. |
| What We Promise | Resources and expertise to help kids be ready to start school, read at grade level, excel at STEAM, and otherwise close the educational gap. | Resources and expertise to help adults achieve accreditation, career development certifications, online degree programs; and to engage in informal learning, in libraries, online, and with partners. |
| How We Define Success | • Children ready for kindergarten.<br>• Children reading at grade level by third grade.<br>• More students are going to college, credentialing programs, and the workplace. | • Adults engaged in career development and change.<br>• Adults engaged in informal learning. |

# Our Proposal: Workflow of Tasks & Schedule
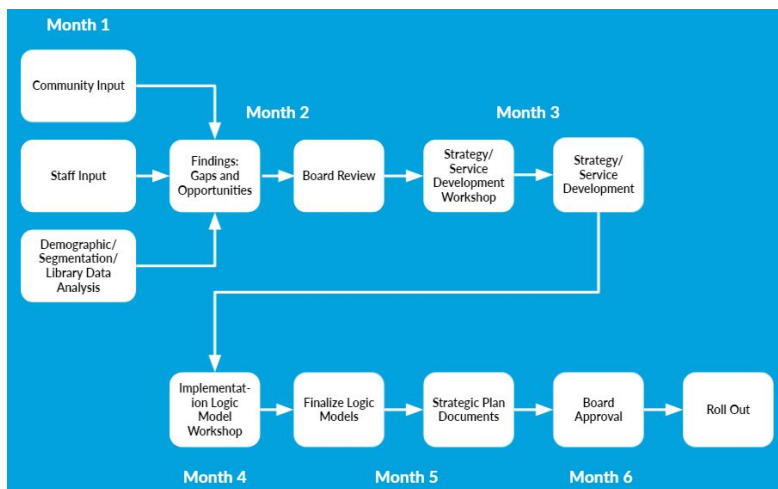


| Task | Task Name | Month: | 1 | 2 | 3 | 4 | 5 | 6 |
|------|-----------|--------|---|---|---|---|---|---|
| 1 | Kick Off Meeting (web) | | ■ | | | | | |
| 2 | Community Engagement | | ■ | | | | | |
| 2.1 | Stakeholder Interviews (web) | | ■ | | | | | |
| 2.2 | Focused Conversations (web) | | ■ | | | | | |
| 3 | Organizational Assessment | | ■ | | | | | |
| 3.1 | Staff Interviews (web) | | ■ | | | | | |
| 3.2 | Organizational Development Workshop | | ■ | ■ | | | | |
| 4 | Segmentation/Usage Analysis | | | ■ | | | | |
| 5 | Gaps and Opportunities Memo | | | ■ | | | | |
| 6 | Library Board Review and Input (web) | | | ■ | ■ | | | |
| 7 | Strategy/Service Development Workshop (onsite) | | | | ■ | | | |
| 8 | Service Strategy Development | | | | ■ | | | |
| 9 | Implementation Logic Models Workshop | | | | ■ | ■ | | |
| 10 | Finalize Implementation Plan Logic Models | | | | | ■ | | |
| 11 | Strategic Plan Report | | | | | | ■ | |
| 12 | Library Board Approval (web) | | | | | | | ■ |
| 13 | Roll Out Discussion (web) | | | | | | | ■ |

# Our Proposal: Tasks/Costs
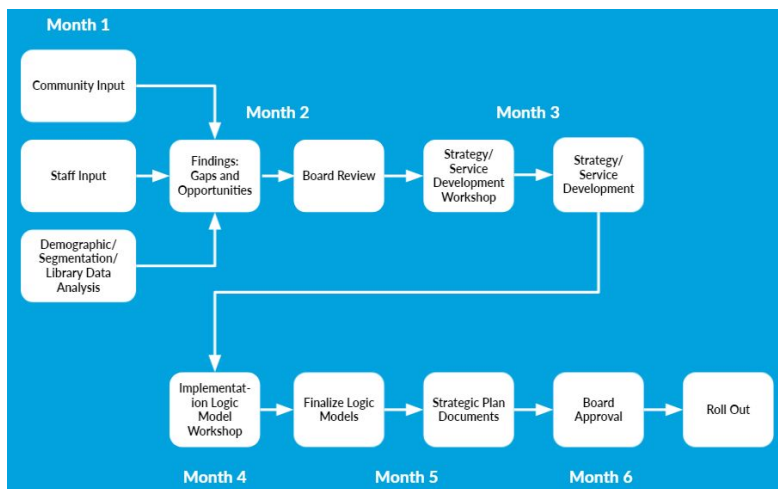


| Task | Task Name | Hours | Amount |
|------|-----------|-------|--------|
| 1 | Kick Off Meeting (web) | 4 | $800 |
| 2 | Community Engagement | 12 | $2,400 |
| 2.1 | Stakeholder Interviews (web) | 6 | $1,200 |
| 2.2 | Focused Conversations (web) | 6 | $1,200 |
| 3 | Organizational Assessment | 12 | $2,400 |
| 3.1 | Staff Interviews (web) | 6 | $1,200 |
| 3.2 | Organizational Development Workshop | 6 | $1,200 |
| 4 | Segmentation/Usage Analysis | 12 | $2,400 |
| 5 | Gaps and Opportunities Memo | 4 | $800 |
| 6 | Library Board Review and Input (web) | 2 | $400 |
| 7 | Strategy/Service Development Workshop (onsite) | 10 | $2,000 |
| 8 | Service Strategy Development | 8 | $1,600 |
| 9 | Implementation Logic Models Workshop | 8 | $1,600 |
| 10 | Finalize Implementation Plan Logic Models | 4 | $800 |
| 11 | Strategic Plan Report | 8 | $1,600 |
| 12 | Library Board Approval (web) | 2 | $400 |
| 13 | Roll Out Discussion (web) | 2 | $400 |
| **Labor Subtotal** | | **112** | **$22,400** |
| | | | |
| **Estimated Reimbursable Expenses** | | | **$2,450** |
| | | | |
| **Total** | | | **$24,850** |

Estimated reimbursable expenses include demographic and segmentation data, geocoding, and travel expenses for one workshop.
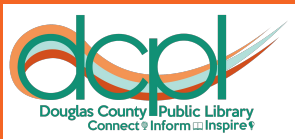
# We love preparing library strategic plans

We're really good at it

We're on time and budget

We have happy repeat clients

We'll provide all Nevada references (North Las Vegas, Las Vegas, Henderson)

We're fun and serious

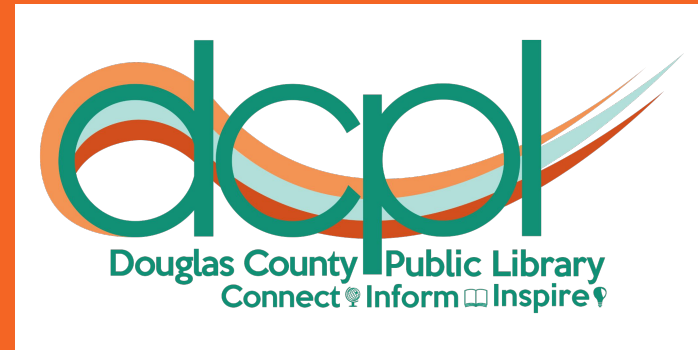We're good at building consensus

We're really good at working with the community

We're really, really good at working with library staff

We deliver really good, pragmatic strategic plans...ask our Nevada clients

# Thank you!

**CIVIC**Technologies



Let's work together to deliver a data-driven, community responsive, timely, and can-do strategic plan for the Douglas County Public Library!

IN **PLAIN** SIGHT
*Marketing LLC*

DOUGLAS COUNTY
PUBLIC LIBRARY
STRATEGIC PLANNING

PROPOSAL
JUNE 8, 2021

2



**Introducing IPSM**

# The intersection of research, analytics and communications.

At In Plain Sight Marketing, we take a holistic approach to your organization by focusing on aligning strategies with your overall goals. We create effective, community-oriented, measurable objectives to ensure your success.

We help you tell your story, connect with patrons and stakeholders, and present yourself to your communities while working toward your vision and your future.

When you work with us, you gain active partners and a team that is dedicated to your success and accomplishing your mission.

IN PLAIN SIGHT
Marketing LLC

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## How We Get You Results

Exploration and Analysis

Evaluation

Strategic Planning

**WHAT WE DO**

Implementation

Creative

Production
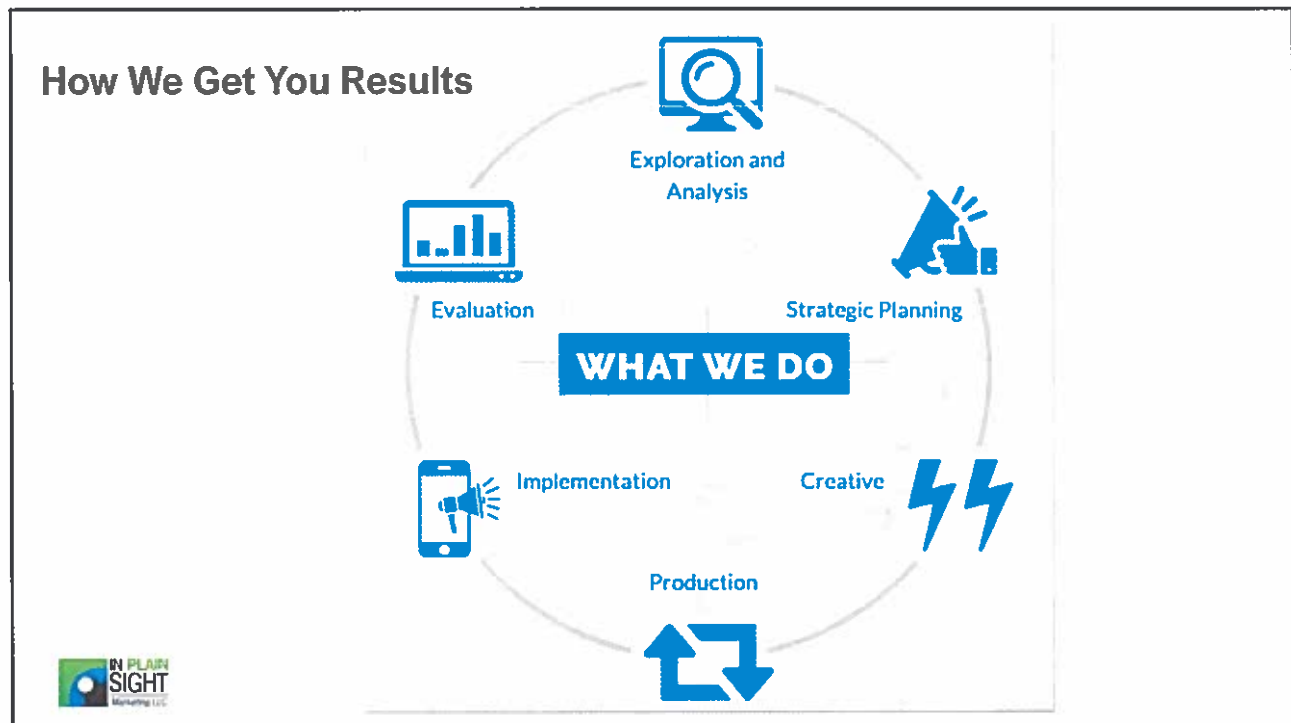
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IPSM: Growth through Research

# Helping Douglas County Public Library Envision the Future

Thank you for the opportunity to present our proposal. Stakeholder engagement and communication are paramount to your success in planning and achieving your goals.

Based on our conversation with Amy and our preliminary research, we are confident in our ability to provide you with a detailed and attainable strategic plan to carry the Douglas County Public Library into the future with purpose and vision.

Thank you,

Renee Plain, IPSM
Mobile: 775.443.6660

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## The strategic planning process will include:

- Meetings with staff, administrators, and the Board of Trustees
- Self-assessment: staff, administrators, and the Board of Trustees
- Community survey
- Teen survey
- Community focus groups
- Review of major library service responses
- PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis
- SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis
- Development of goals, objectives, action plans
- Submission of the final plan to the Board of Trustees
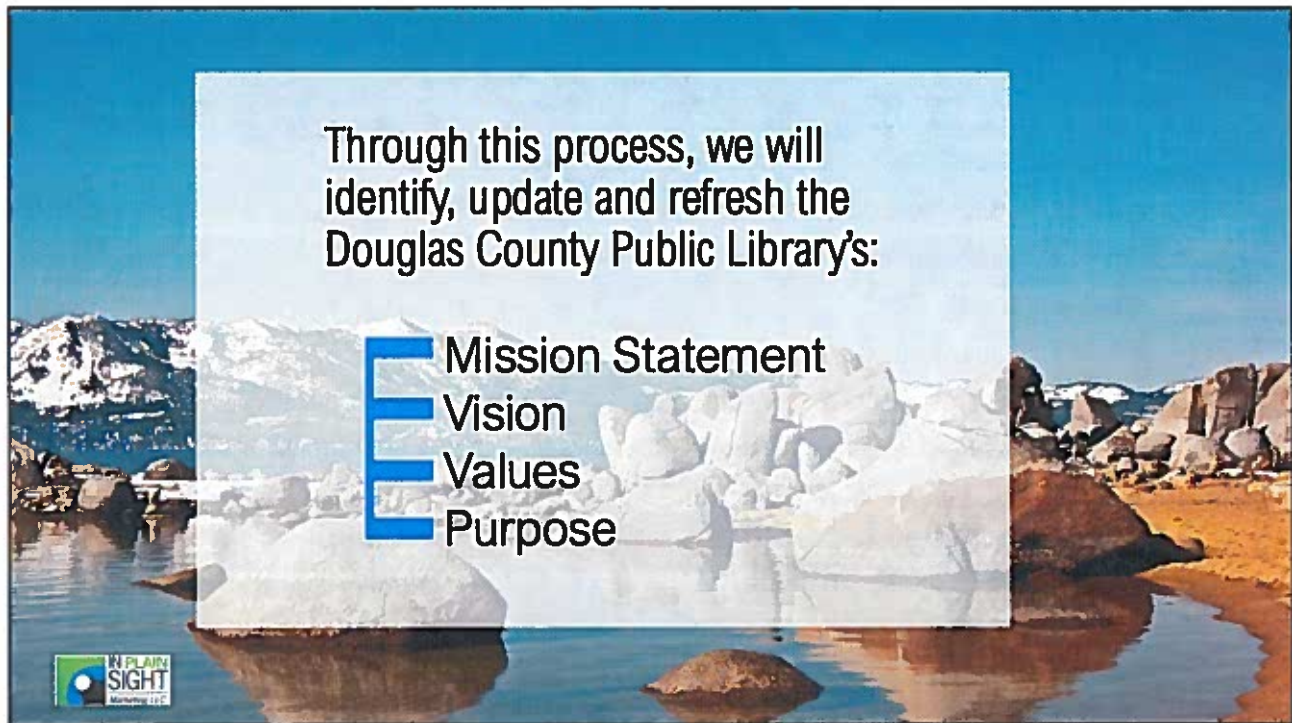
IN PLAIN SIGHT

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## Planning Concepts

Does it align with the Library's Mission Statement?

Is it Specific? Measurable? Actionable? Relevant? Timebound?

Does it support the Library's goals and objectives?

Does the Library's have the necessary financial and human resources?

Does it provide a positive return on taxpayer investment?

Is it inclusive of all members of the community and in the best interest of the public?

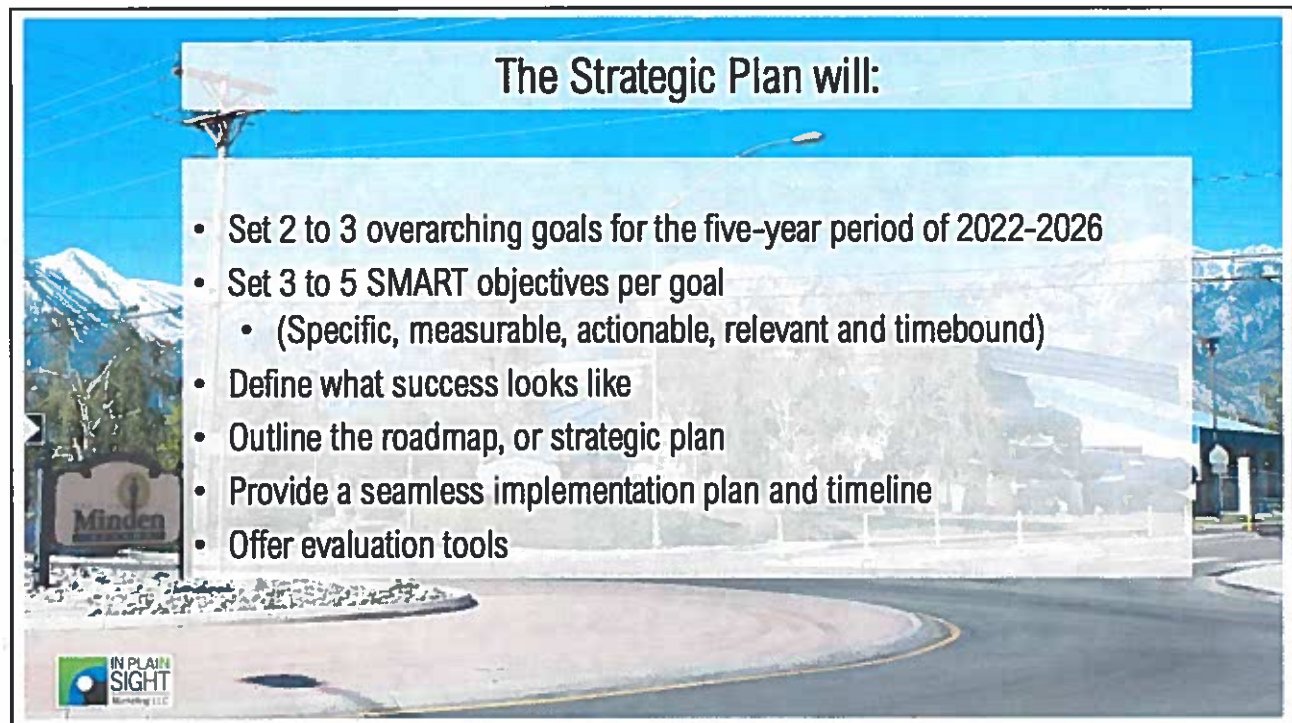Does it elevate the Library's reputation and standing in the community?

7

Through this process, we will identify, update and refresh the Douglas County Public Library's:

E
Mission Statement
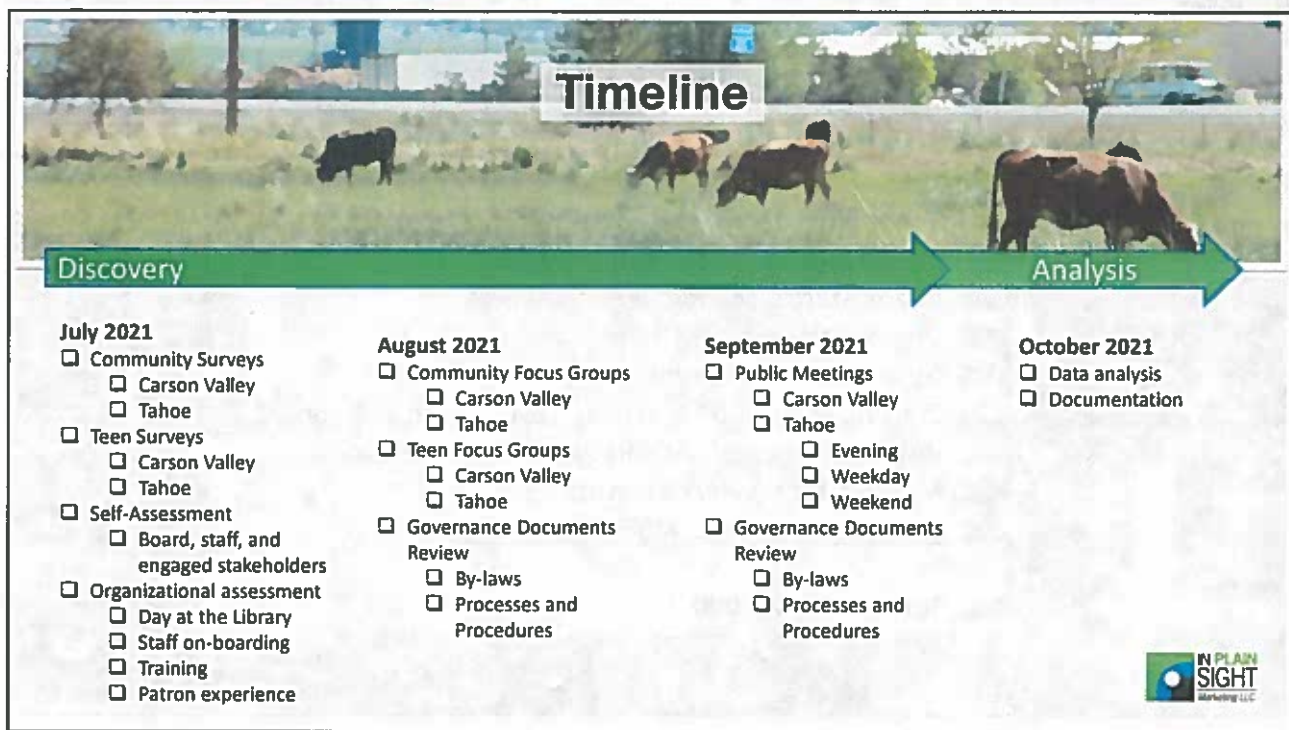Vision
Values
Purpose

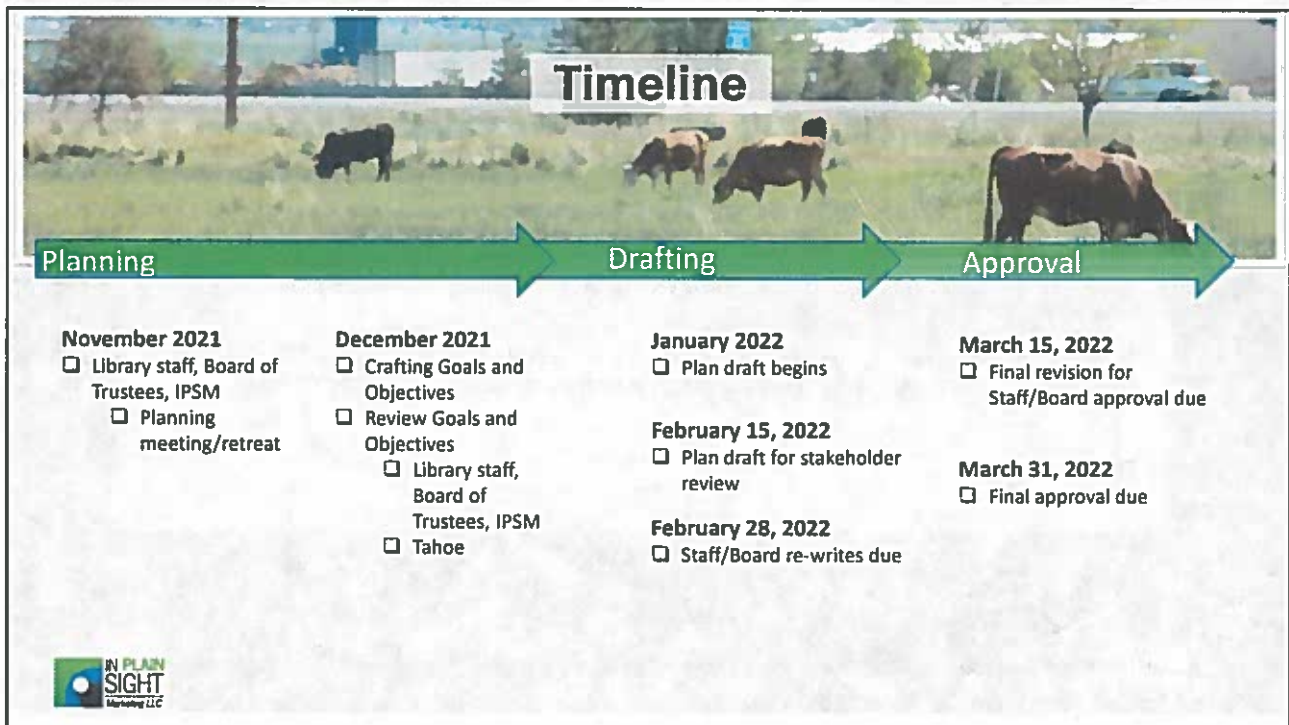IN PLAIN SIGHT

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## The Strategic Plan will:

- Set 2 to 3 overarching goals for the five-year period of 2022-2026
- Set 3 to 5 SMART objectives per goal
  - (Specific, measurable, actionable, relevant and timebound)
- Define what success looks like
- Outline the roadmap, or strategic plan
- Provide a seamless implementation plan and timeline
- Offer evaluation tools

Minden

IN PLAIN SIGHT

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## Timeline

**Discovery** ➤ **Analysis**

**July 2021**
- ❑ Community Surveys
  - ❑ Carson Valley
  - ❑ Tahoe
- ❑ Teen Surveys
  - ❑ Carson Valley
  - ❑ Tahoe
- ❑ Self-Assessment
  - ❑ Board, staff, and engaged stakeholders
- ❑ Organizational assessment
  - ❑ Day at the Library
  - ❑ Staff on-boarding
  - ❑ Training
  - ❑ Patron experience

**August 2021**
- ❑ Community Focus Groups
  - ❑ Carson Valley
  - ❑ Tahoe
- ❑ Teen Focus Groups
  - ❑ Carson Valley
  - ❑ Tahoe
- ❑ Governance Documents Review
  - ❑ By-laws
  - ❑ Processes and Procedures

**September 2021**
- ❑ Public Meetings
  - ❑ Carson Valley
  - ❑ Tahoe
    - ❑ Evening
    - ❑ Weekday
    - ❑ Weekend
- ❑ Governance Documents Review
  - ❑ By-laws
  - ❑ Processes and Procedures

**October 2021**
- ❑ Data analysis
- ❑ Documentation

IN PLAIN SIGHT Marketing LLC

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## Timeline

**Planning** ➤ **Drafting** ➤ **Approval**

**November 2021**
- ❑ Library staff, Board of Trustees, IPSM
  - ❑ Planning meeting/retreat

**December 2021**
- ❑ Crafting Goals and Objectives
- ❑ Review Goals and Objectives
  - ❑ Library staff, Board of Trustees, IPSM
  - ❑ Tahoe

**January 2022**
- ❑ Plan draft begins

**February 15, 2022**
- ❑ Plan draft for stakeholder review

**February 28, 2022**
- ❑ Staff/Board re-writes due

**March 15, 2022**
- ❑ Final revision for Staff/Board approval due

**March 31, 2022**
- ❑ Final approval due

IN PLAIN SIGHT Marketing LLC

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# Cost Proposal

Public meetings, focus groups, Library Board retreat
Community survey (includes data analysis)
Teen survey (includes data analysis)
Board, staff, stakeholder self-analysis
Organizational assessment
Governance documents review
Crafting goals and objectives, review with staff/Board
Writing the plan draft and two to three revisions
Meeting for review of rewrite
<u>Final meetings for Staff/Board approval</u>

**Total Cost: $29,000**

IN PLAIN SIGHT Marketing LLC

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## Wrap-up

You will have a dedicated Senior Account Executive, which will be me. My role is overseeing the strategy and ensuring that we are on track to meeting your goals and our deadlines. You will also have a dedicated Account Manager that you will hear from at least a couple times per week.

You will receive weekly email updates, plus a quarterly report informing you of our progress as well as our progress to goals. We will, of course, review your goals, our progress and content at anytime you need to.

Thank you for the opportunity to present this proposal and the next few pages tell you a little more about IPSM. We have some great case studies and other information on our website at www.IPSMLLC.com

Thank you!

IN PLAIN SIGHT Marketing LLC

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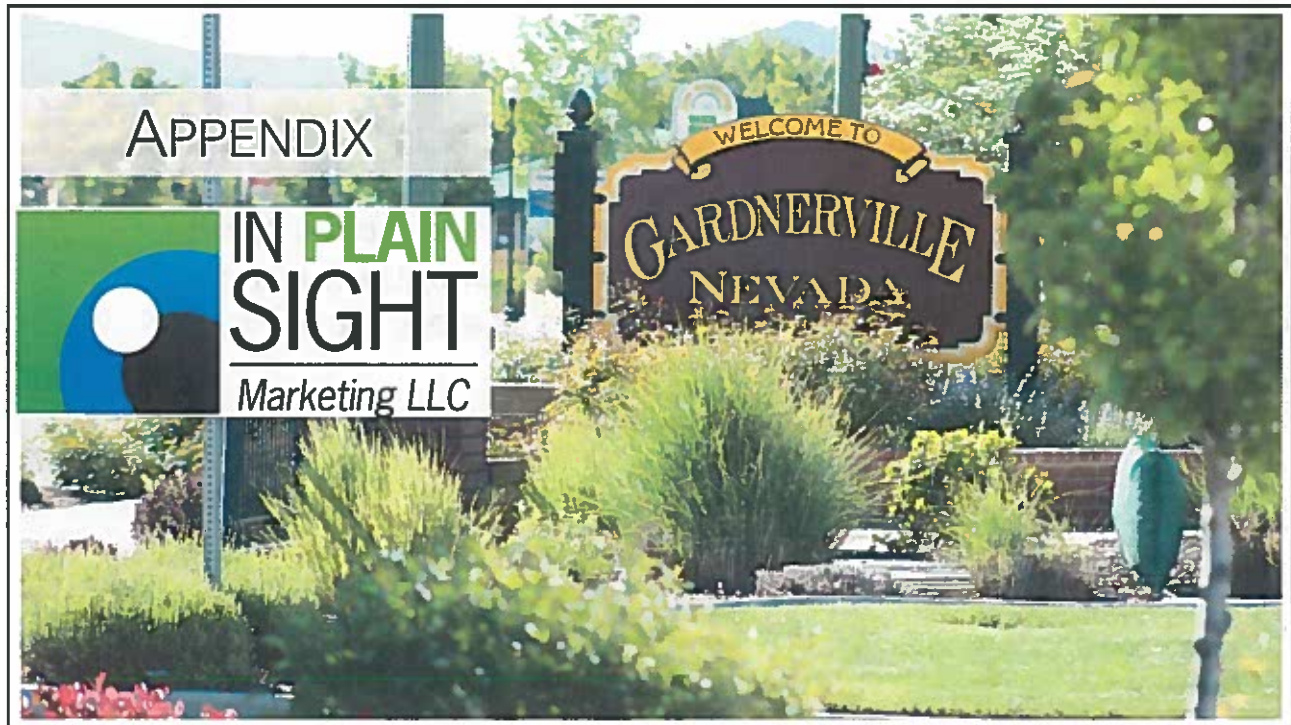
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## IPSM's Commitment to Client Success

Positive growth and marketing results begin with a belief in the story and the brand. We believe in being your conduit between your story and the results you desire for your company. We have an amazing team of professionals operating with one purpose: create measurable and actionable results for our clients.

Here's is a sampling of the brands we have worked with over the past few years:



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"We are so excited to be working with In Plain Sight Marketing. As a not-for-profit agency operating in communities across the country, Renee and her team truly understand what a sense of community is and how to deliver the marketing strategy for us."

**Feeding Pets of the Homeless**
**Genevieve Frederick,** President and Founder

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## The IPSM Team

### Community owned. Community feel.
### Big city strategies and results.

Renee Plain
CEO
Sr. Account Executive

Kathie Taylor, APR
CMSO
Sr. Account Executive

Kristen Furleigh, MBA
**Account Manager**

Pierce Baker
Creative
Specialist

Tim Woda
Lead Gen
Expert

Terri DeLaRosby
Art Director

**3827 So. Carson St**
**Carson City, Nevada 89701**

**www.IPSMLLC.com**

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## IPSM COMPANY VALUES

Stories need to be told

The best minds are open

Laugh and play – a lot – every day

Nobody ever went broke by giving

We've never met an idea we didn't like

Commit to growing strong communities

Compassion, commitment and consistency

Start at the beginning and work hard through the end

Do the right thing, for the right reason, at the right time, all the time

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# An Overview of Past and Current Strategic Planning Efforts – University Center for Economic Development

Tuesday, June 8, 2021

## The University Center for Economic Development

As a part of the College of Business at the University of Nevada, Reno, the University Center for Economic Development conducts applied and basic research studies, provides technical assistance and management assistance services, offers counseling and referral services, and sponsors workshops and seminars.

As a U.S. Economic Development Administration (EDA) recognized *University Center*, we serve clients in both metropolitan and non-metropolitan areas in Nevada. Clients may include state government agencies, communities, organizations or trade associations, and, in some cases, businesses, industries and individuals.

## What is Strategy?

"A strategy is a way of describing *how* you are going to get things done. It is less specific than an action plan (which tells the who-what-when); instead, it tries to broadly answer the question, 'How do we get there from here?' Do we want to take the train? Fly? Walk?"

## Building a Strategy – A Five Component Model

Outcomes

Core Values
———
Noble Cause

Assets          Behaviors
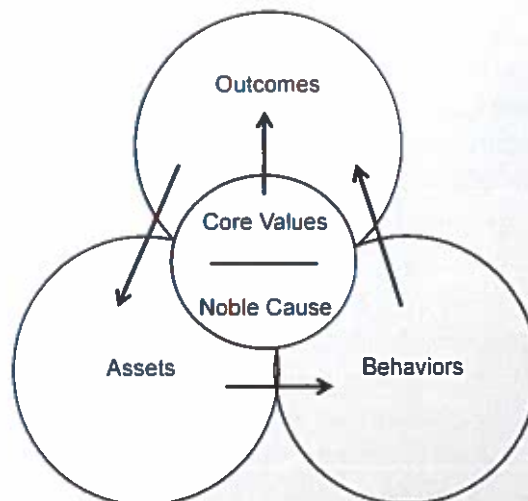
## What is Strategy?

An Organizational Strategic Plan Typically Contains the Following Parts:

- An Evaluation of any Past and Current Strategic Planning Efforts
- An Organizational Assessment (including a Comprehensive Internal and External Operational Environmental Assessment)
- Overview and Assessment of Populations and Groups that the Organization Wants to Reach
- A set of Core Values, a Strategic Mission Statement, and a Strategic Vision Statement
- A set of Strategic Goals and Objectives
- Development of an Action Plan and Accompanying Implementation Measurers
- Steps for Annual Evaluation of the Five-Year Strategic Plan

## What is Strategy?

Additional Elements of a Strategy Include:

- Recognition of existing barriers and resources (people, money, power, materials, etc.)

- An explicit tie to an overall vision, mission, and a set of clearly defined objectives.

- Direction for future planned initiatives focused on providing information, enhancing support, removing barriers, providing resources, etc.

## What is Strategy?

Why Bother with a Strategic Plan?

- It shapes the organization's future.

- It provides a structure for mutually accepted goals and a common agenda.

- It defines the purpose or purposes that the organization is designed to serve.

- It balances organizational goals with a realistic assessment and inventory of available resources.

- And…you have to!

## What is Strategy?

Does the Strategy:

- *Give overall direction?* The strategy should point out the overall path without dictating a particular narrow approach.

- *Fit resources and opportunities?* Should take advantage of current resources and assets while embracing new opportunities.

- *Minimize resistance and barriers?* Keep in mind that opposition and resistance is inevitable. Good strategies should attract allies and deter opponents.

- *Reach those affected?* Should connect the intervention with those who it should benefit.

- *Advance the mission?* The strategy should make a difference on the mission and objectives.

## Incorporating Socio-Demographic and Economic Data and Trends

"You've likely heard that nine out of ten organizations fail to execute their strategies.  The natural question, then, is *why*? Strategies fail for hundreds of reasons:  some are poorly researched, some don't involve the right people, and others simply don't track the right elements.

The strategic planning process is about looking forward, outside the immediate future for your organization, to reach a particular set of goals."

- Ted Jackson, Co-Founder of ClearPoint Strategy

## Incorporating Socio-Demographic and Economic Data and Trends

Data Analysis of the Socio-Demographic and Economic Data Options:

- *Cross-Sectional*:  look at the data at a fixed, single point in time.

- *Comparative*:  examine the data in your community (territory) relative to other communities (territories or regions) within a defined geographic area.

- *Longitudinal*:  focus on changes in the data over time.

## Past and Ongoing Strategic Planning Efforts

Development of 5-Year Strategic Plans for **Library Systems/Organizations**:

- *Lyon County Library System Strategic Plan* (completed 2018 with ongoing Annual Evaluations; *A Strategic Plan for the Lyon County Library System for Fiscal Year 2020 through Fiscal Year 2024 UCED 2017/18-20)*; *$2,600*

- *Carson City Library Strategic Plan* (completed 2019 with ongoing Annual Evaluations; *A Strategic Plan for the Carson City Library for 2019 through 2024 UCED 2018/19-20)*; *$12,000*

## Past and Ongoing Strategic Planning Efforts

Specific Recent Work in **Douglas County**:

- *2020 Comprehensive Update of the Douglas County Master Plan* (completed 2020; Subcontracted by Wood Rodgers; *A Comprehensive Analysis of Socio-Demographic, Economic, and Housing Conditions in Northwestern Nevada: Part of a Comprehensive 2020 Update and Evaluation of the Douglas County Master Plan UCED 2020/21-07)*

- *Update of the Western Nevada Development District's Comprehensive Economic Development Strategy (CEDS); Economic Recovery and Resiliency Efforts* (ongoing)

## Past and Ongoing Strategic Planning Efforts

<u>Current</u> Strategic Planning Efforts:

- *An Update to the Existing Comprehensive Economic Development Strategy (CEDS) for the Northeastern Nevada Regional Development Authority; Economic Recovery and Contingency Elements* (including individual CEDS documents for Elko County, Eureka County, Lander County, and White Pine County and for the City of Carlin, City of Wells, and City of West Wendover)
- *An Update to the Existing Comprehensive Economic Development Strategy (CEDS) for the Southwest Central Regional Economic Development Authority* (including individual CEDS documents for Esmeralda County and Nye County)
- *Development of a New Comprehensive Economic Development Strategy (CEDS) for the Te-Moak Tribe of Western Shoshone* (including the Battle Mountain Band, Elko Band, South Fork Band, and Wells Band)
- *Development of a New Five-Year Strategic Plan for the Nevada Center for Excellence in Disabilities* (statewide)
- *Development of a New Five-Year Strategic Plan for the Government of Nye County* (countywide)

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### Thank You!

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