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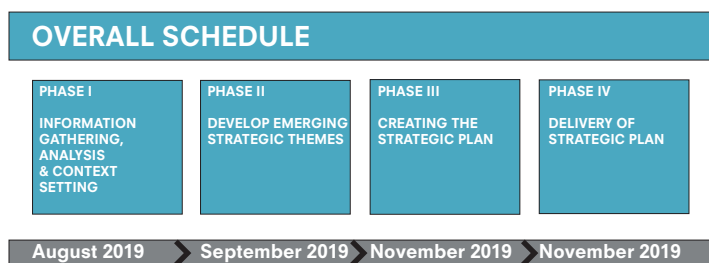
Altadena Library District  
Strategic Plan  
A Point in Time: Initiative Update

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# PHASE I

The Consultant Team, Margaret Sullivan Studio, was hired to assist in a Strategic Planning process that began in July 2019, and will be completed Fall of 2019. The work will result in a final Strategic Plan Framework Deliverable.

The Project is being conducted in three phases:  
**Phase I:** Information Gathering, Analysis & Context Setting  
**Phase II:** Develop Emerging Strategic Themes  
**Phase III:** Creating the Strategic Plan  
**Phase IV:** Delivery of Strategic Plan



## Pre-work: Pre-Reading

The Strategic Planning Committee, the Board of Trustees, and the Leadership Working Group were provided a list of reading materials in preparation for the work on the following:

1. Rising to the Challenge: Re-Envisioning Public Libraries, a report of the Aspen Institute
2. Museums, Libraries, and 21st Century Skills, produced by the Institute of Museum and Library Services
3. Transforming Communities, Strategic Plan produced by the Institute of Museum and Library Services
4. Library as Movement, article by David Lankes

The purpose of this material was to provide information that allowed all participants to consider potential ways the library can leverage its goals within the context of contemporary conditions.

## Pre-work: The Leadership Working Group

A team of 9 members, consisting of Library staff from across the organization have been participating in workshops and organization capacity building with consultants. The Leadership Working Group is being engaged to make meaning from staff and community input, assist in developing our strategic priorities, and are learning how to use service design thinking to better understand and respond to customer and community needs.

The Leadership Working Group represent the ALD staff from the two system locations with a variety of job titles and years of experience to achieve a diversity of perspectives.

## Pre-work: Strategic Planning Committee

The Strategic Planning Committee is a team of 12 staff and community members; the purpose of this group is to lead, contribute to, and generate the plan process, encourage others on the team, on the staff and in the community, and to implement the final plan framework. The SPC and Board of Trustees participated in the *Board Questionnaire* with questions aiming to articulate goals and objectives of the Strategic Planning process and how the Altadena Library District will continue its relevancy in the future.

**Altadena Libraries Leadership Brainstorming**

My Name is: \_\_\_\_\_

Task: As we launch the Strategic Planning process, we are engaging Library leadership in the opportunity to articulate goals and objectives of this Strategic Planning process. We are looking forward to your responses!

Q1. If you could design the library from scratch and with unlimited funding, what would your perfect library of the future be?

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**Altadena Libraries Leadership Brainstorming**

Q2. One of the aspects of Strategic Planning is to identify the "current state" of our organization. Please answer the following questions with a few bullet points that are the most salient.

A. What are the existing strategic areas for the organization?

B. What are the current strengths of the organization?

C. What are the weaknesses of the organization?

D. What are the barriers of staff?

E. What are the barriers of services?

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Excerpt from Leadership Brainstorming Survey

# PHASE I

## Pre-work: Board of Library Trustees Questionnaire and One-on-One Conversations

The Board of Library Trustees was engaged in a questionnaire to garner their input early into the strategic planning process. The board will work with the Trustees to lead, contribute to, generate, encourage and implement the plan.

**Altadena Libraries Questionnaire**  
For the Board of Library Trustees

My Name is: \_\_\_\_\_

Task: As we launch the Strategic Planning process, we are engaging the Board of Library Trustees in the opportunity to articulate goals and objectives of this Strategic Planning process. We are looking forward to your responses!

Q1. What "external forces" are impacting the library "business" and what do we need to be paying attention to in the library industry? For this question "external forces" are defined as any changes in social, technological, economic, education and cultural conditions, at a local or national level.

Q2. What are the biggest challenges facing Altadena Library and our communities?

Q3. What is the Library's most important role in the community?

Q4. What are the Library's greatest strengths?

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Questionnaire for the Board of Library Trustees

Additionally the Consultant Team engaged individual board members in one-hour long conversations that were exceptionally beneficial for gaining insight into the library district's history and the Board's vision for the library's future.

## All-Staff Meeting

When: August 15, 2019  
Where: Community Meeting Room at Main

The Consultant Team met with the entire staff to kick-off the Strategic Planning Process. The one-hour meeting included a brief introduction presentation to the strategic planning timeline, deliverables, process, and the Directed Storytelling method. The attendees then used the *Customer Experience Workshop Toolkit* to design a perfect experience for patrons of the Altadena Library.

The group used the patron personas, which were developed based off of current demographic and tapestry data, and followed a patron on a day at the library. They used the *Customer Experience Journey* worksheet to see the service journey a patron had

to illuminate the barriers, difficulties, and challenges they came across. These challenges reveal the service experience and how it may be improved in the future.

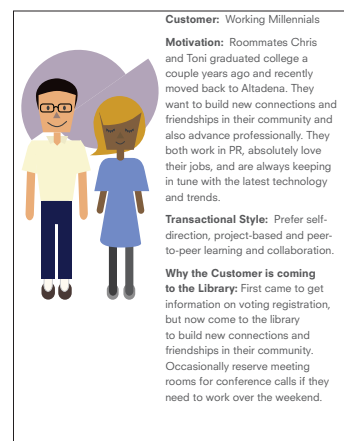
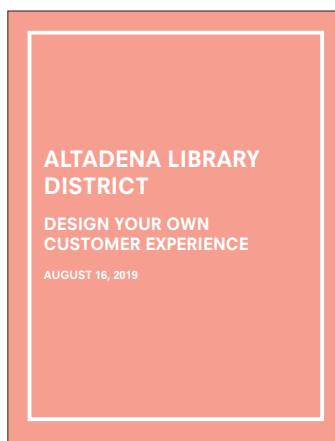


## Leadership Working Group Workshop #1

When: August 15 - 16, 2019  
Where: Community Meeting Room at Main

For Workshop #1, the Consultant Team engaged in two days of workshops and presentations to around the Strategic Planning Process with the Leadership Working Group. During the workshops and presentations, the following was accomplished.

The Consultant Team introduced the The Leadership Working Group to the process, including the principles of Service Design; reviewed the traditional goals of strategic planning and how institutions have traditionally conducted strategic plans; introduced the catalysts for change (environmental and institutional) and how they create the opportunity to question conventional methodologies and conventional outcomes.



Customer Experience Workshop Toolkit

# PHASE I

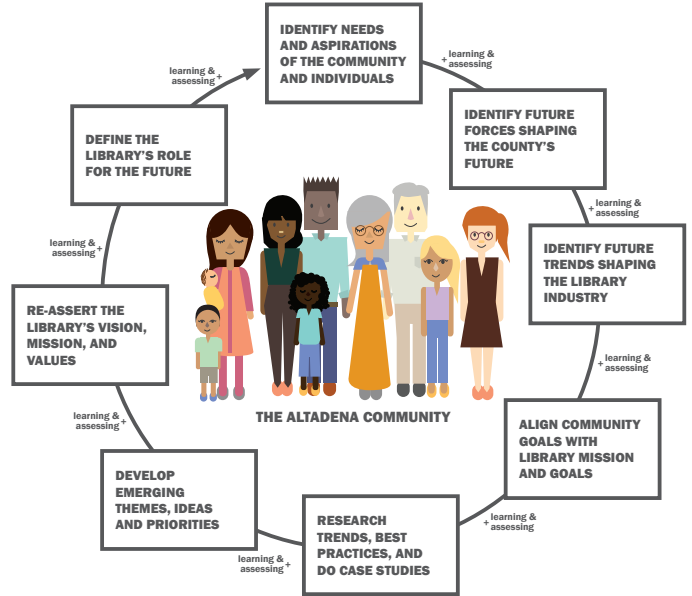
These two days of workshops included training around Directed Storytelling (an interview technique). The group used the *Customer Experience Workshop Toolkit* (previously completed during the All-Staff meeting) as a framework practicing Directed Storytelling.

The leadership group will use similar tools for training the rest of the library staff and in their upcoming Directed Storytelling interviews with actual library customers. The group also practiced their interviewing and rapport-building skills on each other, after identifying top-of-mind customer needs and aspirations, using the *Greatest Needs Worksheet*, that they then portrayed in an interview-like setting. They practiced documenting the information in worksheets like *The Library & Me*.

Key parts of the process that the Leadership Working Group will be impacting during the process are:

- identifying needs and aspirations of the community and individuals
- developing emerging themes, ideas and priorities
- identifying future forces shaping the county's future
- defining the library's role for the future.

## THE STRATEGIC PROCESS



The Strategic Process

**What do you see?**  
What are the **Real Needs and Aspirations** for the Altadena community?

Age Group	Needs:	Aspires:
0-5		
6-10		
11-13		
14-18		
18-24		
24-32		
32-40		
40-55		
55-70		
70+		

Greatest Needs Worksheet

My Library Journey

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DOING

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FEELING & THINKING

My Library Journey

THE LIBRARY & ME	
THE ALTADENA LIBRARY IS...	AT THE LIBRARY, I (WE)...
THE LAST TIME AT THE LIBRARY...	TO MEET MY NEEDS, THE LIBRARY COULD...

The Library & Me Worksheet

My World

PLACES & THINGS

ACTIVITIES

PEOPLE

**ME**

NAME

I WANT TO...

OBSTACLES IN MY WAY...

My World Worksheet

# PHASE I

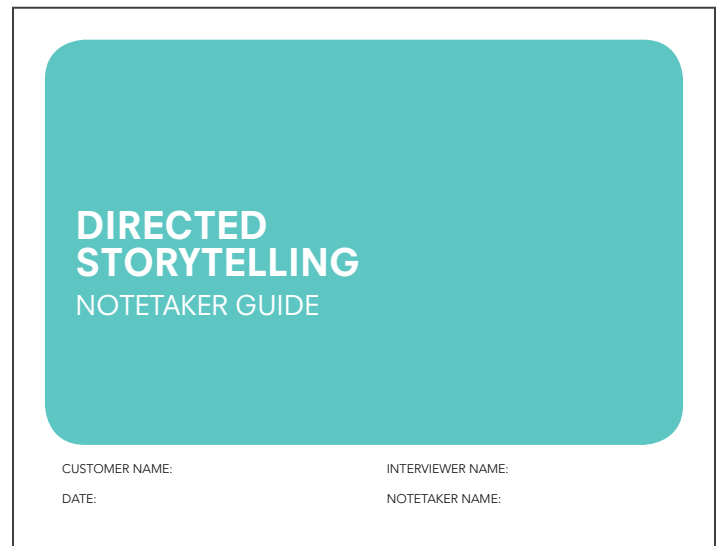
## Directed Storytelling

Directed Storytelling is a Service Design technique of conducting in-depth interviews to identify relevant and general customer needs.

In the time in between Workshop #1 and Workshop #2 at the end of August 2019, the Leadership Working Group will conduct interviews known as “Directed Storytelling.” The staff will divide into teams of two. Each team will conduct two interviews, scheduled in advance, with pre-identified patrons. The purpose of these interviews is to identify unmet and under-met community needs, as well as to build The Leadership Working Group’s skills in using design research methods to inform library strategies and tactics. The outputs from the interviews will be extremely beneficial in informing the process of identifying service priorities, the focus of Workshop #2.



# DIRECTED STORYTELLING



*Directed Storytelling Toolkit*



In preparation for Workshop #2, the Leadership Working Group will continue to stay busy with customer interviews, called “Directed Storytelling.” Each member of the Leadership Working Group will interview one customer, asking about their last experience at the library. The Directed Storytelling work results in a cross-examination of all types of customers and their perception of the current state of the library. The work elicits useful information on customer needs and values. During Workshop #2, Staff synthesizes and analyzes the results using the *Directed Storytelling Analysis Worksheets*, creating a deeper and more meaningful understanding of current library customers and utilization.

# PHASE I

## Community Town Hall

When: August 15, 2019  
Where: Community Meeting Room at Main

On Thursday evening the Consultant Team facilitated a Town Hall for all community members, leaders, and staff members. The goals of the meeting were to update the community on where ALD is in the strategic planning process; facilitate a dialogue to identify key community needs; understand the community's perception of the community, challenges, needs, and opportunities; and identify key areas of focus that may align with the community and the library.

During the two-hour session, participants were invited to use the *Healthy Community Framework* to brainstorm around their own personal definition of Civic Health, Personal Health, Educational Health, Economic Health, and Cultural Identity. From there the attendees discussed and recorded the challenges associated with these concepts in the context of their community, how the community can improve these conditions, and then how the library can be a partner in promoting these areas of focus. Material from this meeting will be incorporated into the strategic planning work to help further align library goals with community needs and aspirations.

## Strategic Planning Committee Meeting

When: August 17, 2019  
Where: Community Meeting Room at Main

At the Strategic Planning Committee Meeting, Margaret Sullivan Studio facilitated a meeting to focus-in further on the role of the library by comparing the current state and future state of the library, building on current strengths, and by reviewing the results and outcomes from the community meetings, community survey, branch questionnaires, and staff meetings. Overarching themes from Phase I were discussed and related to how we will do our work in the future, what we are in the business of, and who we are doing it for and why.

**WHAT DOES EDUCATIONAL HEALTH IN ALTADENA MEAN TO YOU?**

*Access to materials  
because of public school - part of neighborhood - with a learning facility*

1

**WHAT ARE SOME OF THE CHALLENGES YOUR COMMUNITY FACES REGARDING CIVIC HEALTH?**

*WHO'S IN CHARGE OF WHAT? HOW DO WE ADDRESS ISSUES THAT AFFECT OUR LIVES?*

2

**WHAT CAN WE DO AS A COMMUNITY TO IMPROVE ECONOMIC HEALTH?**

*create space for civic engagement to get in touch with organization  
- type up -*

3

**HOW CAN THE LIBRARY BE A PARTNER IN PROMOTING PERSONAL HEALTH?**

*Workshops / Classes / Exercise  
Coffee Events / Classes / Exercise  
Grant Partnerships Art / focused Learning  
@ Events Hours  
@ open conversation - library*

4

#1

**WHAT DOES CULTURAL IDENTITY IN ALTADENA MEAN TO YOU?**

- being recognized by your community
- what we own that we feel defines us (markers of identity) > age is also important
- celebrating differences
- why is everybody here white

1

Healthy Community Framework Worksheet

