SMALL LIBRARY
STRATEGIC PLANNING
COHORT

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When
- The cohort is offered yearly as long as at least five libraries participate.
- Cohort activities run from October through July.
- To confirm your participation in the cohort, register online or email Laura at laura@wils.org by or before September 30th.

Who
- Public libraries with a municipal population of around 5,000 or less.

What
- This cohort uses a model of education, training, coaching, and support, resulting in a strategic plan for the library and the opportunity for all participants to learn about community-driven strategic planning.
- WiLS plans to include public library systems to support member libraries participating in the cohort. In the past, partnering systems provided support and resources to help with the planning process, provided CE contact hours for participating directors, and some systems provided funding to assist with the cost of participating in the cohort.

How much
- The cost to participate in the cohort is $1,995 per library. For an additional $945, WiLS can administer a community survey for any participating library. The survey WiLS provides is a standard, base strategic planning survey. Surveys will be invoiced separately and need to be confirmed by mid-December.

Library participation information
- A participating library will form a team of 4-5 people, with the director as the team's project leader and point person. Each team should have a known backup point person in the event of a director's departure during the cohort.
- Directors will receive professional development with the following learning outcomes:
  - Strategic plan development
  - Data gathering and assessment

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- - Community mapping and engagement
    - Project management
- At this time, participation does not require travel. All cohort meetings are held virtually, or libraries may host a hybrid meeting (in-person, dialed into the meeting via Zoom).
- A meeting schedule will be shared before the cohort kickoff. The full cohort typically meets virtually on Thursdays between 1:00 and 3:00 p.m. Library directors are asked to attend each meeting to help keep their team's progress on track.

Planning team roles and commitment
- 4-5 people, library director plus a combination of library staff, library board, volunteers/Friends, and community members
- Role: varies, but generally:
    - library director typically serves as the point person/team coordinator
    - attend meetings when possible
    - help share and communicate about surveys, community conversations, and other aspects of strategic planning
    - contribute their thoughts/ideas about the community and library from their perspective
    - assist with drafting the strategic plan framework
- Approximate hours for the cohort (October - July):
    - 5-6 hours of asynchronous/independent work
    - ~8 hours of full cohort meetings
    - 3-6 hours of team meetings

General timeline and process
- September: Libraries confirm participation, return paperwork and share planning team contact information with WiLS
- October: Virtual director meet and greets with WiLS
- November: Cohort-wide virtual strategic planning kickoff meeting
- November – December: Recorded data training followed by a virtual meeting to share ideas about data gathering, answer questions, and determine data plans
- December: Libraries confirm WiLS-administered community surveys
- December – March: Libraries (and WiLS) work on data and information gathering
- March: Virtual meeting to discuss data themes
- April/May: Virtual meeting to discuss plan development and writing process, and to start drafting strategic goals
- May – July: Plan writing
- July: Capstone virtual event, libraries present their plan framework (strategic goals and measurable objectives) and we discuss plan activation and assessment

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WiLS-administered survey details

If your team opts to have WiLS handle the planning survey, you get:

1. A branded survey set up for your library in Survey Monkey using WiLS' SM account and WiLS' base community survey twenty-question set. We do not add or make significant wording changes to the questions, but each library will go through and request changes to the answer options based on your library's services/offerings.
2. Two links for sharing the online survey publicly (one for social media, one for everywhere else).
3. This is a printable branded survey that mirrors the online version. Staff need to enter hard copies received via a staff manual entry link.
4. A QR code that can be printed or shared that links people to the online survey.
5. WiLS' data analyst will use the survey results to make a "highlights" slide deck with branded charts and visuals that you can use in strategic planning and to communicate with stakeholders whenever.
6. We'll also share the raw survey data in an Excel spreadsheet.

The library is responsible for:

1. Communicating promptly any changes/edits needed to the working draft of the survey (bulk of work on survey prep will happen in Dec - Jan).
2. Providing logo or library color scheme on time.
3. Promoting the survey and directing people to the online version or the hard copies.
4. Collecting hard copies and entering them using the staff manual entry link by the deadline (exact date TBD).

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