

## The Blue Mountains Public Library

**Report To:** The Blue Mountains Public Library Board  
**Report Name:** GOV.21.08 Proposed Strategic Planning Process  
**Prepared by:** Dr. Sabrina Saunders, CEO

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**Working Group:** Laurey Gillies, Sabrina Saunders, Mary Dodge  
**Meeting Date(s):** April 23, 2019 9:30am  
**Location:** Via Zoom

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**Working Group:** Laurey Gillies, Sabrina Saunders, Mary Dodge  
**Meeting Date(s):** April 26, 2021 10:30am  
**Location:** Via Zoom

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### A. Recommendation

1. THAT this Board approve the Report GOV.21.08 entitled “*Proposed Strategic Planning Process*” as the outline and Plan for completion of the Strategic Plan 2022-2026.
2. THAT this Board appoint Laurey Gillies and Sabrina Saunders [with the Manager of Community Outreach], to complete the Phases of the Strategic Plan. This Working Group will have the responsibility to complete the Strategic Plan Study and report back to the Board with a responsive list of Goals and Objectives which can meet the expectations of a 21<sup>st</sup> century GLAM.
3. THAT this Board provide a training for general Board involvement at a Board Meeting and a more specific training on the methods to be utilized for those Board members who will be participating in Phase I and II of the Plan.
4. THAT this Board revisit the Mission, Vision, Values, and Mandates in or after Phase II, as part of the consultation process, and make amendments to these key documents as informed by the research and consultation.
5. THAT this Board approve an upset limit of \$4,500 for the 2021 advertising and implementation of the of the Strategic Planning process across the municipality.

### B. Background

At the April 15, 2021 Board Meeting Laurey Gillies offered to work with the CEO to begin the planning of a Strategic Planning process for the 2022-2026 BMPL Strategic Plan. At the same meeting and the March 18, 2021 meeting, the CEO stated that Mary Dodge, A/Manager Public Services and Community Outreach would be working on the Strategic Plan with the board/Working Group with a focus on outreach and community consultation. The Board requested a report back by the Working Group, in order to establish the plan for this process.

## C. Proposed Timeline

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In order to:

1. provide a time for the Board to pass and work within the new Strategic Plan; and
2. to have a plan passed prior to any nomination process for the 2022 municipal election, the *June 16, 2022 Board meeting* should be the last possible date for approval. May 19, 2022 would also be possible if the Plan is complete.

- **Phase I: April-August 2021**
  - 5 months
  - Planning, Community Awareness, and Listening Stage [promote, stages, be in community and listen, interact, informal consultation]
- **Phase II: September-December 2021**
  - 4 months
  - Consultation [meetings, focus groups, zoom, surveys, post-it events, etc]
- **Phase III: January-April 2022**
  - 4 months
  - Analysis and Feedback Stage [evaluate and analyze information, participate in feedback loop with participants, and community]
  - Mission, Vision, Values review
- **Phase IV: May 2022**
  - 1 month
  - writing of the Strategic Plan draft and final Information Session as final feedback
- **Phase V: June 2022**
  - 1 month
  - retool, Board approval June 16, 2022
  - present to Council as Information end of June
  - Virtual Town Hall directly following Council presentation

## D. General Discussions

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- The 2018 Strategic Plan and its strategic directions were responsive to the 2018 year. The main directions [Communication, Organizational Capacity, Vibrant Spaces, and Service Excellence], which may be retooled for specific needs in 2021/2022 will have a similar thread since these are key areas for GLAMs. The objectives will be clearly different as we have been successful with achieving many of the 19 objectives to date. Ultimately the community consultation and study phases of this Plan will determine the goals and their objectives.
- We should focus on what is different:
  - How has the landscape changed since 2018
  - What has been achieved and has next steps
  - What was extended either due to situations or COVID-19
  - What are new targets we were not aware of prior
  - Community growth (general and pandemic)
  - Virtual and on-demand services couples with traditional services
  - Impact on new growth on schools as a partner and de facto BVCS school library
  - New/growing demands on East end based on transitioning residents (more permanent)
  - Shifting workforce (return to cities, remain in TBM post-pandemic)
  - Increasing demand for libraries to be technology community hubs for community, especially rural

- The 2018 consultation was highly transparent and was participated in by numerous sectors. What was done well should be replicated.
- Areas we were not as successful was in gathering voices of the non-user, non-supporter.
- Leisure Activities Plan, Master Facilities Plan should be completed prior to this Plan being complete, or at least have the recommendations and report in draft so the BMPL Plan is not off-side. These two Plans should inform the BMPL Strategic Plan. The BMPL Plan may need to address differences in community perspective, based on the methodology and types of questions each study asked, in the event there are differences.
- Where/when does ROI plan into this?

## E. Communication Needs

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- A need for a Communication Strategy to inform the community what a 21<sup>st</sup> century GLAM is. This may be before the main Community Consultation as well as during. We spoke of this in the 2018 Plan. The public will need to be inform of shifts in core services to BMPL as well as shifts in how our community are accessing services and the types of services being requested.
- How do we get the information out to the non-users. In recent years these non-users have been vocal about their perception of core services, which do not necessarily match the BMPL core services and service model of a 21<sup>st</sup> century GLAM. How do we engage non-users to participate?
- Stronger focus on diversity, all pockets of community involved. A true reflection of the community-and not only leaders of groups. How do we include both BIPOC members of the community as well embed BIPOC content across our services.
- How have people's lives changed as a result of the pandemic, and how this impacts the planning for BMPL to meet these new needs/changes? How does the community feel, what is the pace of change they are willing to embrace?

## F. Outliers

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There were items which fell outside of the Strategic Plan in 2019 and 2020. We found ways to fit them into the 4 main goals, but not into the 19 objectives. As the planning begins, the CEO will identify these items from the past three years of Strategic Plan Action Plans s these and like outliers can be better incorporated into the plans.

## G. Harwood Institute

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The [Harwood Institute](#) and the Model was also discussed as an example of community engaged strategic planning.

- Community Conversation Workbook and models were discussed. Mary Dodge will continue to be involved in this process as the Harwood grad, even after her A/Manager position is complete.
- Important concepts to be incorporated:
  - Listen and gain public knowledge
  - Relations of Trust- to gain, build and expand partnerships
  - Build advocates
  - Train advocates and Library Champions
  - Cause a Chain Reaction (transformation, break barriers)
- Key to engagement is to build on the quiet listening stage by attending community activities and programs to gather community perspectives. Build these into the early stages of the consultation, as well as a strategic objective of the Strategic Plan (such as in a Communication Goal).

- Recruit Board/volunteers to be listeners and recruiters of participation. Questions for the Working Group to address are:
  - What might volunteers be doing and how they would be supported.
  - How do we recruit members to assist in this process—Listeners are required, not necessarily those to lead a conversation.

See also Appendix A for a detailed breakdown of the Harwood Institute and the impact it could have on the process.

## H. Who and How

### 2018 Successful in reaching:

- Teachers
- Migrant workers
- Business sector (Chamber)
- Teens, elementary age
- Day cares
- Seniors
- Families
- Citizens Forum
- General Users
- Technology users/maker users
- Partners
- ACC and artists
- MAC and museum users
- Broadband / wi-fi users
- Service Clubs (Rotary)
- Board-why are you here, what do you see for the future of governance
- Staff-what should we be doing that innovated sites are doing

### 2018 Unsuccessful in reaching/not in our scope:

- Seasonal/Weekend users
- Service Clubs
- Probus
- BMRA
- BIPOC communities and community members
- Religious leaders (as partnerships and how we can be of service and support)
- Medical professionals [Physician Recruitment Cmt-new]
- Senior Residence and LTC
- Disabled and with disabilities [BVO, Lions]
- Low income, affordable housing [BVO, county]
- Single family

## I. Possible Methods of Reaching these Groups

Method	Examples	Where/How	Who	What do we hope to gain
Quiet Stage	attend events, activities, meetings-how can we support, what are the gaps, listen and informal discussions	Partner groups and meetings.  Various Service Groups and clubs	Small group of volunteers.  All Board and volunteers in their own circles bringing information to their groups or to the Working Group	Better understanding of the interests and needs in our community so we can identify where the needs are

<b>Method</b>	<b>Examples</b>	<b>Where/How</b>	<b>Who</b>	<b>What do we hope to gain</b>
Surveys	short weekly feedback surveys, long formal survey, bang the table	Paper and Online Use TBM Bang the Table for 1 or More	Ongoing short surveys by staff. Short surveys on governance by working group. Larger survey by working group	Inform Working Group for a better understanding going into interviews/ focus groups, as well as follow up after.
Focus Groups	by group or topic areas	Face to Face/Zoom, on their locations, outside.	Long list of groups will be identified.  Working Group will facilitate  Some Board or volunteers may have roles in their personal circles.	In-depth examples and information for the Strat Plan.
Post-It Event	in person in the Gallery or on windows in LES, online post-it	Use mural for online or physical post-its on site. Move 1 day event to a 2 week period.	Working Group will devise questions. Staff will perform	Large scale information about community needs and interests.
One on One Interviews	Select interviews	Face to Face or Zoom	Working Group will facilitate	Specific information or clarification
Presentations	Presentation and feedback at others meetings	If other community groups are holding meetings, being given time at their meetings to promote and hear feedback	Working Group or Board/Volunteers in their circles	A wider reach to those we may have in activities and events.
Virtual Town Hall	Info Sessions / Virtual Town Hall	Hold Virtual Town Halls in a Zoom meeting, multiple over a 1 or 2 week period. Present the draft plan and gather feedback	Working Group or Board	Review of potential findings and gain feedback on draft Plan
E-mail & Website Comments	Open up feedback loop through email and website	Promote on social media, e-newsletter and website	Staff	An additional feedback loop for those who have areas they wish to provide feedback on, but do not wish to participate in formal ways.

Social Media		How do we incorporate social media more, while still containing the comments		
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**J. Final Document & Presentation**

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- Background
- Comprehensive Website which includes the Stages and areas of work In-Progress
- Deeper Dive of the Research
- Upcoming-Town Hall, focus groups, where we will be,
- Methods of Reaching Groups
- Our Planning Process
- Final document can be an executive report with the bulk of research and other content held in the website.

**K. Next Steps**

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The Board will determine if this draft plan is the method they wish to endorse, appoint a Working Group to do the bulk of the work with a mandate, and set target dates.

On Behalf of the Working Group,  
 Dr. Sabrina Saunders, CEO  
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## Appendix A:

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### The Harwood Institute for Public Innovators Approach

- [Harwood Approach](#) has innovated and developed a practical approach to move communities and society forward where community is a common and enduring enterprise
- This method equips public sector organizations to build a more equitable, fair, just, inclusive, and hopeful path forward, ensuring every person has the opportunity to fulfill their human potential

### What is the Harwood Approach?

- Harwood fundamentally believes in the possibilities for change in public life and politics, and in the ability of people to tap their own potential to make a difference and join together to forge a common future. This approach is described as being achieved:
  - By rooting in a philosophy of **Civic Faith**, which places people, community and shared responsibility at the center of our shared lives
  - Only when we **Turn Outwards**—a mindset—as our framework and reference point for creating change
  - **Change Happens** through highly intentional actions that cascade and spread through a series of chain reactions
  - Catalyzing change requires that we step forward and turn outward with intentionality. The approach is guided by **How You Show Up**.
- The Harwood Approach puts community conversations as forefront to gathering public knowledge on the community's aspirations and paths forward
  - **Phase 1:** Community Conversations will build public knowledge, identify challenges, and will build new norms for engaging the community
  - **Phase 2:** Strategies & Action will work through key pieces of community change, and align efforts about strategies for change
  - **Phase 3:** Forging Strategies will focus on community change, determine evidence and evaluation, set targets that fit context, and recalibrate scope of work
  - **Phase 4:** Deepen & Spread will work across internal teams to focus on the impact, along with recognizing and sharing short-term change while simultaneously recalibrate long-term plans

### Benefits of the Harwood Approach

- It puts people, communities, and shared responsibility at the center of our lives finding the right solution, at the right time, with the right people.
- By listening to people's shared aspirations and what people believe needs to change in their community, we can create real impact in their communities and on their lives by creating strategies that truly meet their concerns and aspirations
- Uncover and generate a sense of common purpose for action in the community by rooting our work in what matters to people in the context of their lives.
- Set off a chain reaction that makes progress on key issues and sets a new trajectory of hope in the community by starting where the community is and finding a pace of change that best fits the local context

### Incorporating the Harwood Approach

- Framework and tool for how we show up and turn outwards

- Community Conversations will be used to help further build on public knowledge
- Gather public knowledge on community aspirations, key issues of concern and pace of change
- Evaluate and incorporate public knowledge to set off a chain reaction of progress
- Uncover and generate a sense of common purpose for action in the community creating a new trajectory for hope

**BMPL's Commitment to the Harwood Approach**

- Use a staff who is trained in the Harwood Approach [Mary Dodge, A/Outreach Manager] to guide our process. This is in place of an external consultant and will tap into the Harwood Model and the expertise of staff and members of the Board.
- Key Take Aways:
  - Listen and gain public knowledge
  - Relations of Trust- to gain, build and expand partnerships [in the Strategic Plan process and throughout the Strategic Plan 2022-26]
  - Build advocates
- Build on the quiet listening stage by attending community activities and programs to gather community perspectives. Build these into the early stages of the consultation, as well as a strategic objective in Communication.
- Recruit and training Board/volunteers to be listeners and recruiters of participation.