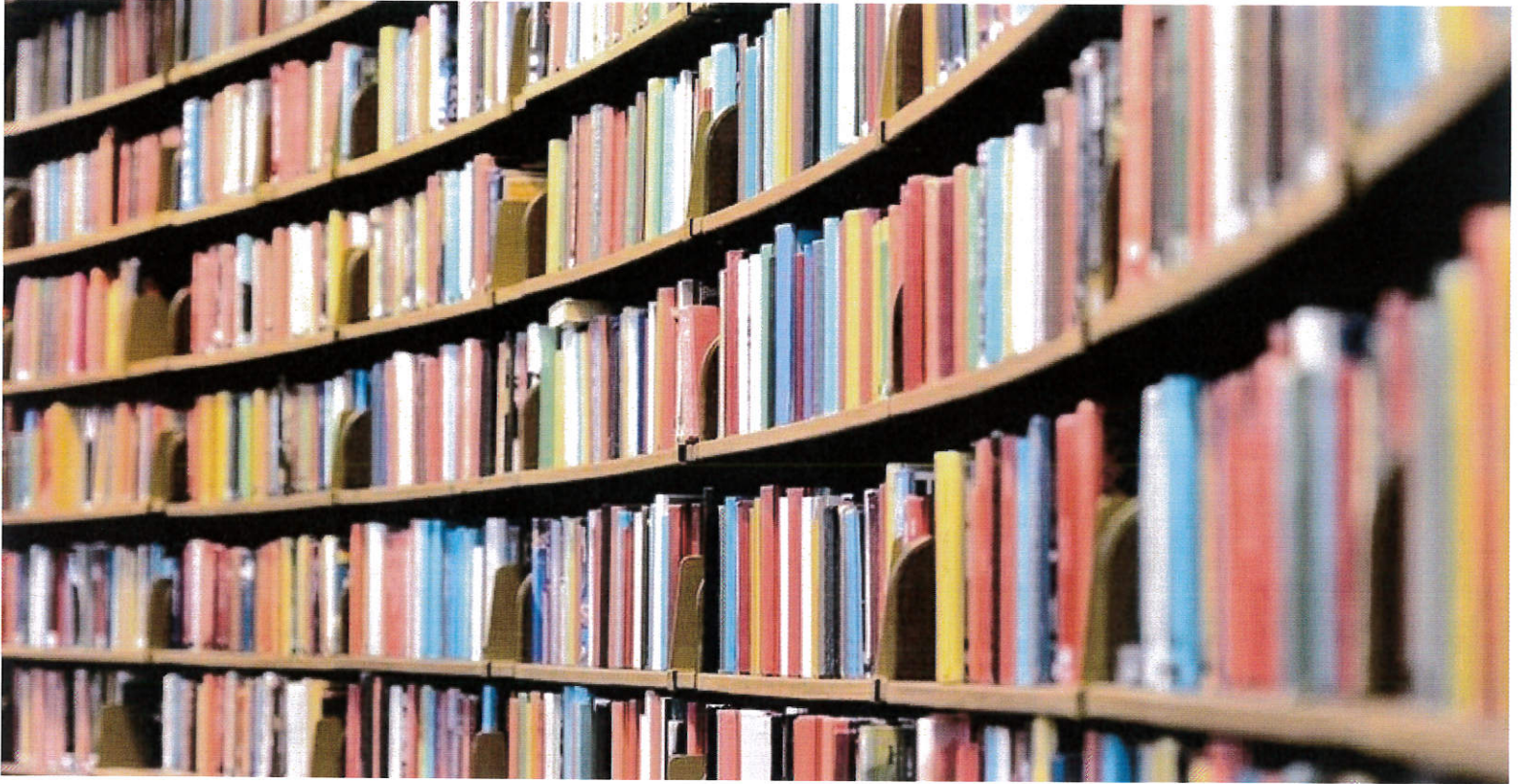


Strategic Planning Proposal for the Leelanau Township Library

February 26, 2024



Proposal submitted by:



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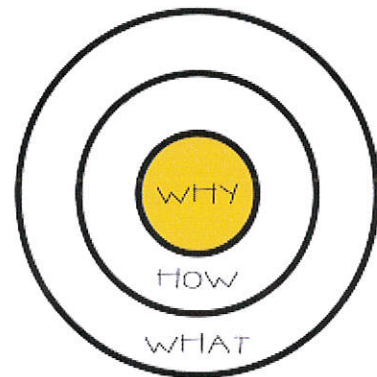
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Cover Letter

I am pleased to submit this proposal to Leelanau Township Library (LTL) for strategic planning process facilitation and consulting. I am the Founder and Lead Consultant for [Fast Forward Libraries LLC](#), a small consulting group specializing in assisting libraries and nonprofits over the past 22 years with focused, flexible planning processes to increase their performance and impact. Besides strategic planning, we assist organizations with fundraising and development planning, capacity building/organizational development, staff training and team building, data collection and analysis, and grant writing.

This proposal details a grounded research planning process that will result in a focused, actionable 5-year strategic plan for LTL. The Fast Forward Libraries team has extensive experience working with public libraries and strives to be a neutral process facilitator and partner to maximize community and stakeholder input, reflection, learning, and plan operationalization so the resulting strategic plan is compelling, responsive, and focused. We are steeped in organizational development methods and group dynamics, both essential elements of the strategic planning process. We specialize in processes leading to a graphical one-page strategic plan (see example provided), which is vital for community and stakeholder communication and a visual reminder of the strategic direction during the life of the plan.

The graphical one-page plan is supported by an annual activity plan to guide the day-to-day management of the plan that roll up to the established strategic directions, mission, and vision. Using [Simon Sinek's "Golden Circle"](#) (*Why? How? What?*) model and PLA's new ["Strategic Planning for Public Libraries"](#) by [Joy L. Fuller](#)¹ as a framework for the process, stakeholders at all levels find connection and purpose in the plan which makes success achievable.



Each process we facilitate is customized to achieve shared goals. Helping libraries develop their strengths and become learning organizations is our passion because libraries are the anchor of democracy in our society, and we need to evolve to respond to community needs in holistic ways that honor the complexities of our society. Adopting the practices of a learning organization during the planning process will equip LTL to be a flexible, nimble, and vital institution for decades to come.

It's exciting that LTL is engaging in strategic planning and considering library impact in the community. Strategic planning is a crucial development activity and will positively impact LTL for years to come. I think you will find that our proposal closely aligns with your needs. Please do not hesitate to email or call with any questions. I look forward to hearing from you!



Amanda E. Standerfer
Fast Forward Libraries LLC
Founder & Lead Consultant

¹ Our client [Indian Trails Public Library District](#) in Wheeling, Illinois is heavily featured in this publication.

Executive Summary

The Leelanau Township Library (LTL) seeks to engage in a collaborative, participatory planning process that will result in a comprehensive 5-year strategic plan for the library. After the uncertainty of the last several years and many changes at the library, it's a good time to celebrate success, assess what's working, deepen community connections, and set a course for the next five plus years. Using a fresh, streamlined strategic planning process, LTL can consider what opportunities exist and how to evolve to increase impact in the community and broaden partnerships, especially focusing on reaching underserved populations through an appreciative inquiry and grounded research approach. To that end, this proposed learning-focused strategic planning process will result in a clear, adaptive plan that is grounded in the library's strengths to streamline decision-making and focus on impact.

In our approach, we use:

- [Systems thinking](#) - considering individual aspects of the library, how they interrelate, and what this means for overall dynamics and potential levers for change.
- [Design thinking](#) - putting humans as the core of the library's work.
- [Diversity, equity, and inclusion](#) - DEI is a critical foundational framework that is applied throughout the process.

The planning process is organized into three phases:

LEARN: Core to the planning process is learning. Learning requires research, information gathering, dialogue, and analysis. A considerable amount of time is devoted to learning during this process—both internally within the library, and externally out in the community—to help participants deeply connect with all things LTL. Our role as process facilitators is to direct learning activities and to serve as a neutral guide during the process.

Internal learning: Board and Staff members will have several opportunities to participate in and contribute to the strategic planning process during this phase including engaging in an environmental scan, SOAR (strengths, opportunities, aspirations, results) analysis, and survey.

External learning: Community input (qualitative and quantitative) will be gathered in multiple ways (TBD based on process design). We will concurrently engage in a community needs assessment process using focus groups and interviews to gain a view of what's on the minds of community members representing various stakeholders and groups, especially focusing on non-users. At the same time, we will conduct a community survey to get broad community input about library strengths and impact. In addition, we will compile data on community demographics and community organization strategies to give additional context to the process. We will look for strengths and connections to help Trustees and Staff consider LTL's role in new ways.

At the end of this phase, we'll summarize all data with findings in a Learning Report. The Learning Report is key to informing the agenda for the DREAM phase of the process.

DREAM: During this phase, Trustees and Staff members will synthesize the learning and dream about the future during retreat sessions. The retreat sessions allow for dedicated time and space to step back and think strategically, working through ideas together to build strategic plan elements. In addition, we'll review (and update if needed) the current vision and mission statements.

DO: Finally, the plan will start to take shape, and we'll spend time during this phase developing and revising documents and graphics that make the plan come to life. We'll develop an activity plan that will guide implementation over the life of the plan and help LTL think about the plan's narrative and milestones. We'll also

develop an evaluation framework and talk about reporting structures to communicate success to stakeholders and the community.

The final product will be a comprehensive, data-driven, outcome-focused strategic plan with an accompanying one-page graphical version. The plan will be realistic in scope and includes a recommended activity plan draft with an evaluation framework. Committing to this process and way of operating will require clear communication and buy-in from Staff and the Board. The results will unify and energize all involved!

A Note on COVID-19

Planning always comes with unique challenges and opportunities for the organizations involved. Current events dictate further complications with renewed efforts to fight COVID-19 and its variants. As such, this plan relies on gathering community, staff, and stakeholder aspirations, wants, and needs using a hybrid of virtual engagement tools and, should conditions allow, in-person methods.

With extensive experience in virtual community engagement and collection of qualitative data, the consultants of Fast Forward Libraries can confidently deliver virtual engagement and planning activities when necessary. In our experience, there is no substitute for in-person conversations and engagement. However, virtual options remove some barriers and allow for collection of ideas and opinions from a more diverse pool of community members and stakeholders. When it is safe for communities and stakeholders to gather in person, our consultants will be there to lead activities. Ideally, a hybrid virtual/in-person approach will be adopted regardless of the effects of COVID-19.

Your Strategic Plan Overview / Summary of Deliverables

Deliverable	Purpose
<p>Learning Report</p> <ul style="list-style-type: none"> Comprehensive report of all data gathered during the initial phase of the planning process. Provides analysis and findings that helps Staff members and Trustees build strategic plan elements. 	<ul style="list-style-type: none"> Key tool for informing strategic planning process. Summary to provide community members and stakeholders as support for strategic plan elements.
<p>One-page Graphical Plan</p> <ul style="list-style-type: none"> High-level graphical version of the strategic plan. Quick reference for: <ul style="list-style-type: none"> Vision Mission Strategic Directions Goals 	<ul style="list-style-type: none"> For communication about strategic direction. Use in library (as a flyer and poster), on website, and in publications. Use in Board reports as reminder of high-level strategy. Use in staff areas as reminder of high-level strategy. Use with library users/the community in publications and at meetings as a reminder of high-level strategy.
<p>Strategic Plan Document</p> <ul style="list-style-type: none"> This is the expanded, more traditional text-heavy strategic planning document for Board approval. It provides additional context and detail about the planning process and other plan components. 	<ul style="list-style-type: none"> Use on your website as the “full plan” for community/stakeholders to review. Staff should have access to this document so they can understand their role in implementation.
<p>Implementation Elements: Activity Plan and Evaluation Framework</p> <ul style="list-style-type: none"> The activity plan is an internal document for staff members to use when planning annual activities that will help meet the plan goals, timeline, and staff responsibilities for the activity. The activity plan can also be used for internal updates/reports to streamline strategic plan management. The activity plan changes and is updated annually by staff. The evaluation framework breaks down which metrics will show progress for each goal. 	<ul style="list-style-type: none"> Staff use the activity plan to detail annual activities and accomplishments. The activity plan can also be used to set individual performance goals. The activity plan can be used to develop progress reporting using template. Evaluation framework, aligned with goals, helps stakeholders understand metrics that show strategic plan success.

Key Personnel and Qualifications/Experience

Amanda E. Standerfer, MA, MLIS



Amanda’s passion is helping libraries and nonprofit organizations advance so they can create meaningful impact in their communities. Since 2002, Amanda has served as a consultant and facilitator, working with libraries, nonprofits, and small businesses on strategic planning, fundraising, organizational development, and capacity building (operating as a sole proprietor until formalizing as Fast Forward Libraries LLC in early 2022). Recent clients include [PrairieCat](#) (library consortium in Illinois), [Indian Trails Public Library District](#) (Wheeling, IL), and [Spring Lake District Library](#) (MI).

Amanda was most recently the Director of Community Engagement for [The Urbana \(IL\) Free Library](#). She’s spent about half of her career working in philanthropy (as Program Officer for [The Lumpkin Family Foundation](#) based in Mattoon, IL and as Program Director with the [Southeastern Illinois Community Foundation](#), serving Effingham and Mattoon, IL) and the other half in libraries (as Head of the Adult Division at the [Decatur \(IL\) Public Library](#) and as Director of the [Helen Matthes Library](#) in Effingham, IL). She loves melding her library and philanthropy knowledge – a self-proclaimed “philanthro-brarian.”

Amanda has twice been elected to the Board of the [Illinois Library Association](#) (ILA), most recently completing a three-year term in 2016. Amanda was also selected as a member of the first class of *Synergy: The Illinois Library Leadership Initiative* and one of only two librarians ever selected for participation in *Leadership Illinois*.

Amanda holds a B.A. and an M.A. in history from [Eastern Illinois University](#) and an M.S. in library and information science from the [University of Illinois at Urbana-Champaign](#). You can find out more about Amanda on [LinkedIn](#).

Amanda is the lead consultant for this project and will manage all aspects of the process.

Laura Huddleston, MLIS



Laura Huddleston is an associate consultant with Fast Forward Libraries. She has a special interest in the “how” of public libraries and loves to learn about ways they can thrive to benefit patrons and communities.

For ten years, Laura led the children’s department at the Mattoon Public Library perfecting a few story time voices and the ability to find a title based on a two-word description. During her tenure, Laura managed collection development, various school/public collaborations, and all children’s programming. She helped design and launch the MPL’s inaugural Book Buggy mobile library to reach underserved youth and piloted the First Grade, First Card program to bring library cards to local first-graders. Laura served on the ISLMA Monarch Award Committee and received a 20 Under 40 Award from the Mattoon Journal Gazette for contributions to her community.

Laura recently served as Program Officer for Community Outreach and Organizational Learning at the Lumpkin Family Foundation where she led new efforts in trust-based philanthropy, impact evaluation, and organizational learning including a facilitated EDI process for board and staff.

Laura currently serves as a trustee of the Mattoon Public Library and as a community advisor for the Coles County Peace and Justice Fund. She holds a BA in Spanish and secondary education from Eastern Illinois University and an MLIS from Indiana University.

Laura is the project manager, providing research and logistical support, supports community input elements, and manages the development of the Learning Report.

Sarah Forbes, PhD.



Dr. Sarah Forbes is the founding Director of Student Academic Success at [Rose-Hulman Institute of Technology](#), helping students to discover new strategies to achieve their academic goals. Prior to this, Sarah spent 10 years as the Director of Data Management and Reporting. Her role in the Office of Institutional Research, Planning and Assessment was to manage data collection and reporting to all functional units on campus as well as to external constituents. She also served as a liaison between Academic Affairs and Enterprise Information Technology, helping each group to identify their needs and streamline both data entry and reporting processes.

Prior to working at Rose-Hulman, Sarah worked at the [Helen Matthes Library](#) in Effingham, Illinois. There she focused on marketing, outreach, and adult education.

In her spare time, Sarah serves as a research consultant to non-profit organizations. Sarah earned a B.A. in Psychology from [McKendree University](#), an M.A. in Experimental Psychology from [Indiana State University](#), and a Ph.D. in Curriculum and Instruction from [Indiana State University](#).

Sarah assists with community survey development and compiles data for the Learning Report.

Jennie Grace, BFA



Jennie Grace is the Graphic & Web Designer for [The Urbana \(IL\) Free Library](#), a position she's held since 2007. Jennie holds a BFA in graphic design from [Eastern Illinois University](#).

Jennie creates the one-page plan document.

Work Plan

Phase I: LEARN

The first phase of the strategic planning process is the longest and the most important! During this phase, we'll spend time gathering data internally and externally to inform the strategic planning process.

Board & Staff Process Orientation & Input: It is key to generate excitement about the process with the Board and Staff and to involve them early in the process. To do this, we'll focus inward. Amanda will hold sessions with the Board and Staff to get them oriented to the strategic planning process and conduct an environmental scan, SOAR analysis (similar to a SWOT, but with an appreciative inquiry lens focusing on strengths, opportunities, aspirations, and results), and get input on what else we need to learn as part of the process. Paired with these sessions is a Board and Staff Survey to get insight into the library's working culture to start identifying strengths and gaps.



Community Needs Assessment Focus Groups & Interviews: To gather input from non-users, we will use a needs assessment approach. It is key to reach out to community stakeholders and groups working with underserved populations to ask for their assistance in organizing specific focus groups and encouraging participation in the process. These focus groups and interviews will give vital input into the process related to overarching community concerns that the library needs to consider during the planning process.

Gather Community Feedback & Conduct Research: At the same time as the community needs assessment process, we'll gather community and stakeholder feedback via a survey. The community survey is key to gaining a broad understanding LTL's current state, strengths, and potential future direction from community members that care about the future of the library. Amanda will develop the community survey (edited and approved by the Library Director) to get qualitative and quantitative input on:

1. **Awareness of Library Services** – How aware are respondents of the various library services? Where do they learn about what's going on at the library? (This data can be benchmarked for future evaluations.)
2. **Value and Satisfaction** – What aspects of LTL's work do respondents value the most? Are they satisfied with LTL's work? (This data can be benchmarked for future evaluations.)
3. **Community Needs** – What are top community needs? How might the library address these needs?
4. **Future Focus** – What's important going forward? What are LTL's strengths? How should LTL measure success?
5. **Other relevant questions** – Operating hours? Facilities? Accessibility? Support of a future referendum? TBD by the Library Director

In addition, we'll compile community demographic data and complete a scan of community organization strategic plans to identify needs, opportunities, and gaps.

At the end of this phase, Amanda, Sarah, and Laura (with assistance from the Library Director) will gather all information into a Learning Report. The Learning Report will identify library strengths and provide findings that will ground the Board and staff retreats in the next phase.

Deliverables:	Finalized planning process timeline with meeting dates. Learning Report that includes analysis and findings from information gathered/reviewed, survey, focus groups, and interviews. Regular check-ins with Library Director.
Timeframe:	April – July 2024

Phase II: DREAM

This phase starts with a Library Director meeting to review the Learning Report and plan for the Board and staff retreats.

Board Retreat Session: The 3-hour Board retreat will focus on reviewing learning and dreaming about the future. During the retreat, we'll get the Board up to speed on the planning process, review and discuss the Learning Report, review and update the vision, mission, affirm strategic directions, and set plan goals. During the session, the Board will also talk about possible activities that will help achieve plan goals. We'll use our time to critically think about what's most important for LTL, including new services that will address priorities, services to discontinue, capacity building strategies, methods of outreach that might attract underserved populations, and funding implications.

Staff Retreat Session(s): During this phase, we'll also hold a 3-hour staff retreat (or multiple, shorter retreats to maximize staff participation) to also share the Learning Report and dream about the next 5 years. Staff will spend time brainstorming activities that will help achieve plan goals. This input is valuable to the activity plan that will guide implementation.

It's important that everyone feel engaged at the retreats and that their perspectives are expressed and respected, so the facilitation will be flexible to accommodate for multiple input methods. At the end of the sessions, participants will feel confident that LTL is on the right track for transformative change, rooted in strategies for equity, innovation, and flexibility in the delivery of library services.

The final piece of this phase is another Library Director meeting to debrief on the retreats and discuss a draft strategic plan outline.

Deliverables:	Board and staff retreat sessions. Strategic plan outline. Regular check-ins with Library Director.
Timeframe:	August – September 2024

Phase III: DO

In this phase, we'll draft and revise the various plan documents. Amanda, Laura, and Jennie will prepare drafts of the graphical and written versions of the plan and the activity plan. The Library Director will review and edit the drafts. In addition, we will share the drafts with key staff and stakeholders for feedback.

After Library Director review, we'll present the draft plan documents to the Board for final comment/revisions. This session will allow the Board to clarify next steps and discuss an implementation and communication strategy for the plan.

After the Board session, Amanda will make revisions and present final plan documents for approval. Final implementation steps, like finalizing the activity plan, and developing the evaluation framework will take place with the Library Director around the time of Board approval to move from strategic planning to implementation.

Deliverables:	All draft plan documents approximately one month after the retreat sessions with final documents presented a month after presentation of the drafts. Regular check-ins with Library Director.
Timeframe:	October – November 2024

Exclusions or Exceptions

Fast Forward Libraries is pleased to offer Spanish translation of the community survey for an additional fee (see the Work Plan). Unfortunately, at this time, no other languages are available.

Fast Forward Libraries excludes any interpretation service related to the focus groups or interviews. The library is responsible to provide any on-site interpretation services required.

Fast Forward Libraries excludes any cost related to the printing and/or mailing of the community survey. A print-ready version of the survey will be provided upon survey launch and the library can print and distribute this version at the library and throughout the community. While a mailed survey is not recommended, the library may choose to print and mail the survey at their own expense. The library might want to consider a postcard mailing to the community to inform them about the online survey (this type of mailing is less costly and has been effective in other communities). Fast Forward Libraries would advise the library during this process, but not be responsible for any cost associated with the final product. In addition, the library is responsible for entering all printed surveys into Survey Monkey.

Schedule of Costs and Timeline

Phase I: LEARN

Goal: To finalize the planning process and receive community/stakeholder feedback that will inform the strategic planning process.

<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant -led</u>	<u>Option 2: Staff-led</u>
<p>Kick-Off Meeting: Review process and timeline, discuss information gathering needs, and initial information gathering.</p>	Amanda and Library Director	April 2024 2 hours preparation 90-minute meeting (via Zoom videoconference) 1 hour follow-up	\$500	\$500
<p>Community Survey Development and Administration: Develop survey instrument and refine with Library Director. Administer and monitor survey with Library Director assistance with link distribution.</p> <p><i>*Print survey available for distribution. Library staff enter responses.</i></p> <p><i>**Mailed survey not recommended. Mailing cost not included.</i></p> <p><i>***Spanish translation of SurveyMonkey version of the community survey is available for \$1,500. This includes a paper version of the survey for the library to print on-demand.</i></p>	Amanda, Laura, and Sarah with assistance from Library Director	May 2024 20 hours survey development 10 hours survey administration/monitoring Email/phone meeting(s) as needed	\$3,000	\$200 (Amanda provides examples, staff administers survey)
<p>Initial Board and Staff sessions: Conduct environmental scan, SOAR analysis, and get input on vision and mission.</p>	Amanda	May 2024 4 hours preparation 1.5-hour session with Board (via Zoom videoconference) 1-hour session with staff (via Zoom, may need multiple staff sessions) 2 hours follow-up	\$1,000	\$100 (Amanda provides agenda and worksheets, staff conduct sessions)

<p>Board and Staff Survey: Develop and administer survey/s as approved by Library Director specific to internal feedback, especially related to future training needs of staff.</p>	<p>Amanda and Laura with assistance from Library Director</p>	<p>June 2024 8 hours survey development, administration, and monitoring</p>	<p>\$800</p>	<p>\$100 (Amanda provides template, staff administer survey)</p>
<p>Community Needs Assessment – Focus Groups and Interviews: 3 focus group sessions (one-hour each via Zoom) and up to 6 interviews (15-30 minutes each, via phone), develop focus group/interview questions, review agenda with Library Director, compile notes.</p>	<p>Amanda and Laura (with logistical assistance from Library Director)</p>	<p>June 2024 2 hours preparation 3 1-hour sessions (via Zoom) 6 15-30-minute interviews 4 hours notes/reporting</p>	<p>\$3,000</p>	<p>\$200 (Amanda provides agenda, staff conducts sessions/interviews)</p>
<p>Learning Report: Develop report that analyzes and synthesizes all information gathered (including library and community data supplied by library staff).</p>	<p>Amanda and Laura with editing assistance from Library Director</p>	<p>July 2024 30 hours learning report</p>	<p>\$3,000</p>	<p>\$200 (Amanda reviews and edits report that staff develops)</p>
<p>Phase I total (inclusive of supplies and travel):</p>			<p>\$11,300</p>	<p>\$1,300</p>

Phase II: DREAM

Goal: To report learning to the Board and staff and build plan elements at retreat sessions.

<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant- led</u>	<u>Option 2: Staff-led</u>
Planning Meeting: Review Learning Report and prepare for Board and staff retreats.	Amanda and Library Director	August 2024 1 hour preparation 1-hour meeting (via Zoom videoconference) 1 hour follow-up	\$300	Same as consultant-led
Board Retreat Session: 3-hour, in-person session with Board to review learning and develop strategic plan elements.	Amanda	August or September 2024 4 hours preparation 3-hour meeting with Board 2 hours follow-up 1 day on-site	\$3,000	Same as consultant-led
Staff Retreat Session: 3-hour, in-person session (if gathering all staff in one meeting is not possible, we can hold multiple, shorter sessions to maximize participation) with staff to review learning, review strategic plan elements, and brainstorm activities to achieve plan goals. <i>*To keep travel costs low, the Board and staff retreat sessions will be held on consecutive days.</i>	Amanda	August or September 2024 4 hours preparation 3-hour meeting with staff 2 hours follow-up 1 day on-site	\$3,000	Same as consultant-led
Library Director Debrief Meeting: Check-in with Library Director to review strategic plan outline document. Deliverable: Strategic plan outline.	Amanda and Library Director	September 2024 4 hours preparation 1-hour meeting (via Zoom videoconference) 1 hour follow-up	\$600	Same as consultant-led
Phase II total (inclusive of supplies – travel estimated to be approximately \$1,500 NOT INCLUDED in total – receipts provided for reimbursement):			\$6,900	\$6,900

Phase III: DO

Goal: To develop and refine all plan documents, develop activity plan aligned with evaluation framework, and prepare for plan approval.

<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant- led</u>	<u>Option 2: Staff-led</u>
<p>Document Development: Develop graphical and written plan for review by Board.</p> <p>Deliverable: Draft plan documents for Board review.</p>	Amanda and Laura	October 2024 30 hours	\$3,000	\$200 (Amanda provides examples and reviews staff drafts)
<p>Board Meeting: Meeting with Board to review all plan documents and make final revisions.</p> <p>Deliverable: Final plan documents for Board approval.</p>	Amanda with Board	October or November 2024 2 hours preparation Up to 1 hour meeting with Board (via Zoom) 2 hours follow-up	\$500	\$0 (staff design presentation)
<p>Activity Plan and Evaluation Framework: Develop draft documents for review by Library Director.</p> <p>Deliverable: Draft evaluation framework.</p>	Amanda and Library Director	November 2024 1-hour meeting with Director/staff 6 hours document development	\$700	\$200 (Amanda provides examples and reviews staff drafts)
Phase III total (inclusive of supplies):			\$4,200	\$400
Grand total: (inclusive of supplies – See travel note in Phase II):			\$22,400	\$8,600

References

Mr. Brian Shepard

Executive Director
Indian Trails Public Library District
Wheeling, IL
847-279-2202
bshepard@indiantrailslibrary.org

Facilitated comprehensive strategic planning process for public library serving 67,000 residents.

Ms. Donna Richards

Board President
Pollard Memorial Library
Lowell, MA
978-502-7373
Donna.S.Richards@gmail.com

Provided facilitation for strategic planning process for public library serving 111,306 residents.

Ms. Carolyn Coulter

LLSAP Services Manager / Director
PrairieCat (Illinois)
309-623-4176
carolyn.coulter@railslibraries.info

Provided strategic planning facilitation for multi-type library automation consortium.

Mr. Joel Horwedel

Executive Director
Lincoln Memorial Garden
217-529-1111
joel@linconmemorialgarden.org

Provided strategic planning facilitation for regional nature center that included community engagement and a Board retreat.

I am happy to provide contact information for any client listed on the following page – just ask!

Library Strategic Planning:

- Allegan District Library (MI)
- Athens Regional Library System (GA)
- Bellwood Public Library (IL)
- Bensenville Community Public Library (IL)
- Black River Falls Public Library (WI)
- Bloomfield Township Library (MI)
- Carlock Public Library District (IL)
- Cary Area Public Library District (IL)
- Chillicothe Public Library District (IL)
- Cheltenham Township Library System (PA)
- Crystal Lake Public Library (IL)
- Des Plaines Public Library (IL) (department-level strategic planning)
- Duluth Public Library (MN) – Every Child Ready Duluth Initiative
- Dunlap Public Library District (IL)
- Elk Grove Village Public Library (IL)
- El Paso District Library (IL)
- Farmington Community Library (MI)
- Fondulac District Library (IL)
- Fossil Ridge Public Library District (IL)
- Fountaindale Public Library District (Bolingbrook, IL)
- Franklin Public Library (MI)
- Helen Plum Library (Lombard, IL)
- Highland Park Public Library (IL)
- Hollis Social Library (NH)
- Holly Township Public Library (MI)
- Indian Prairie District Public Library (Metamora, IL)
- Indian Trails Public Library District (Wheeling, IL)
- Keweenaw Public Library (IL)
- LACONI (continuing education consortium in northern Illinois)
- La Grange Public Library (IL)
- Lakeland Library Cooperative (ILS only) (Grand Rapids, MI)
- Lake Villa District Library (IL)
- Lapeer District Library (MI)
- LibraryLinkNJ
- Mahomet Public Library (IL)
- Minnesota Library Association
- Minnesota Multicounty Multitype Library Systems
- Nashua Public Library (NH)
- Norfolk Public Library (NE) Harnett County Library System (IL)
- Orien Township Public Library (MI)
- Oswego Public Library (NY)
- Orange County Library System (FL)

LSTA 5-year Evaluation Projects:

Idaho Commission for Libraries (2021)

Library Strategic Planning (con't):

- Pollard Memorial Library (Lowell, MA)
- Portage District Library (MI)
- PrairieCat ILS (northern IL)
- Prairielands Library Exchange (MN)
- Resource Sharing Alliance NFP (central IL)
- River Forest Public Library (IL)
- River Valley Public Library District (IL)
- Round Lake Area Public Library District (IL)
- Santa Clara City Library (CA)
- Schaumburg Township District Library (IL)
- Southwest Michigan Library Cooperative (MI)
- Tippecanoe County Public Library (Lafayette, IN)
- Traverse des Sioux Regional Library System (MN)
- The Urbana Free Library (IL)
- Utah Library Association
- Viking Library System (MN)

Library Organizational Capacity Building:

- Addison Public Library (IL) (culture code)
- Broadview Public Library District (IL, community survey)
- Elmhurst College (IL) (Staff retreat)
- Grayslake Area Public Library District (IL) (unified service desk reorganization)
- Grayslake Area Public Library District Foundation (IL) (capacity building)
- Helen Plum Library (Lombard, IL) (culture code)
- Indian Prairie Public Library (IL) (Board and Staff retreat facilitation)
- Indian Trails Public Library District Foundation (Wheeling, IL) (fundraising planning)
- Lillie M. Evans Public Library District (Princeville, IL, focus groups)
- Mahomet Public Library (IL) (fundraising planning)
- Harnett County Library System (IL) (culture code)

Library Training, Workshop, Webinar, or Coaching:

- Alaska State Library DirLead (director's retreat)
- Bloomington Public Library (IL) (fundraising capacity building)
- Fast Forward Library Leadership Cohort (leadership development program – two sessions annually)
- Herrick District Library (MI) (facilitation)
- Illinois Library Association (Trustee Day programs)
- InfoPeople (webinar)
- LACONI consortium in northern IL (strategic planning workshop)
- Next Level Library Leadership Institute (FL) (coaching)
- Reaching Across Illinois Library System (webinar)

Nonprofits (strategic planning facilitation unless noted):

- Champaign County Design and Conservation Foundation (IL)
- Coles County Habitat for Humanity (Charleston, IL, board retreat)
- Coles County United Way (Mattoon, IL, board reorganization and strategic planning)
- Effingham County Museum (IL)
- Family Service of Lake County (IL)
- Fit-2-Serve (Mattoon, IL)
- Illinois Environmental Council / Education Fund
- Illinois Stewardship Alliance (Springfield, IL)
- The James Project (Springfield, IL)
- Kidzeum (Springfield, IL)
- Lincoln Memorial Garden (Springfield, IL)
- Mid Illinois Big Brothers Big Sisters (Effingham, IL division)
- Sugar Grove Nature Center (IL)
- Sullivan Chamber and Economic Development (IL, board retreat and strategic planning)