



San Francisco
Public Library

Strategic Planning & As-Needed Consulting

Proposal
3 June 2021

Diversity Training University International
Margaret Sullivan Studio
SmithGroup

June 3, 2021

Mr. Marcus Lange, Contract Manager
San Francisco Public Library
100 Larkin St., Room 680
San Francisco, CA 94102

Dear Mr. Marcus Lange,

We are delighted to respond to the request for proposal from qualified teams to provide Strategic Planning and As-Needed Consulting Services for the San Francisco Public Library system and the City and County of San Francisco. The spirit of this request presents a unique and comprehensive approach to the five-year plan. One that seeks to engage a broad set of stakeholders, analyze the regional context, and deliver a transformative strategy and an adaptable roadmap. In response, DTUI has galvanized a collaborative partnership of local and national expertise to present our customized approach to specifically respond to the goals of SFPL.

DTUI with Contigo Communications and Two Rivers, Margaret Sullivan Studio with Harmonic Design, and SmithGroup collectively bring a depth of strategic work, strategic thinking, inclusive community engagement processes, quantitative and qualitative analyses, and sophisticated project management to ensure project success. Additionally, we bring a passion for public libraries to be co-created with the community, and designed by the community’s voices to constantly evolve to serve San Franciscans ambitions. With deep compassion, intellectual curiosity, and an “imagine the possibilities” spirit, we will inspire all participants to “bring their best selves” to this work!

This will be demonstrated in a highly participatory, engaging, challenging, and process-driven work approach that will result in a bold vision, clarity of purpose, and a flexible strategic roadmap to guide an adaptable organization through the times of immense change, growth, and uncertainty that San Franciscans will experience.

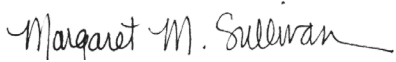
Furthermore, as San Francisco enters a post-pandemic recovery, how SFPL can serve its diverse communities is even more urgent. This work will result in the SFPL becoming a critical foundation to the City’s social infrastructure, embodying SFPL’s human- and community-centered equitable values, and providing social and physical resiliencies for a thriving, just, and prosperous community.

We understand the urgency of this time and the opportunity for SFPL to lead the equity-driven community economic development agenda for the City. We will bring our team’s collective horsepower to meet this moment on behalf of current and future generations of San Francisco Public Library patrons. Our team looks forward to the next step.

Sincerely,



Dr. Billy Vaughn, Senior Managing Partner
Diversity Training University International
(415) 692-0121
billyvaughn@dtui.com



Margaret Sullivan, Principal
Margaret Sullivan Studio, LLC.
(646) 785-9841
margaret@margaretsullivanllc.com



Georgia Sarkin, Principal
SmithGroup
(415) 227-0100
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SMITHGROUP

DTUI.com LLC (DTUI) is a California Limited Liability Company with five partners. Founded in 1998, DTUI provides organizational change, training design and development, employee engagement, leadership development, and diversity and inclusion solutions. DTUI are experts in organizational assessment and strategic planning. DTUI also offers training through its Diversity Executive Leadership Academy (DELA). Executives receive credentialing training that builds their capabilities for supporting organizational change, training, and diversity, equity and inclusion. The intensive DELA strategic planning course among the course list is directly relevant to this proposal. We have trained nearly 3000 participants in this course over the past twenty years. Participants from major universities, large and small cities, police academies, transportation administrations, and libraries have developed their strategic plans with our guidance.

The company has successfully delivered strategic planning services to a list of client organizations, including Southern Illinois University Library, the National Archives, and San Francisco Metropolitan Transit Authority (SFMTA).

DTUI does not have any past or current lawsuits against any company, including subcontractors for work performed under any contract, nor is there a claim settled within the past five years. DTUI Team:

- Billy Vaughn, Ph.D., Senior Managing Partner
- Eileen Sanchez, Executive assistant
- Mary Ellen Ruiz, CDP, Partner
- Kathy Simonis, CDP, Consultant & Lead Faculty
- Michael Eatman CDP, Associate
- William Makell, Jr., CDP, Associate
- Annie Rose London, Associate
- Jewel Martin, CDP, Advisory Board Chair

DTUI and its subcontractors (Project Team) attest to being able to start July 2021.

Project Team

The following organizations will collaborate to form the Project Team, each bringing significant expertise and experience that collectively will achieve the best outcomes to fulfill the project objectives:

- Margaret Sullivan Studio LLC (MSS)
- DTUI.com LLC (DTUI) - Micro LBE
- SmithGroup
- Contigo Communications (Micro LBE)
- Two Rivers (Micro LBE)

TEAM MEMBERS NARRATIVE

Our team will bring a wealth of complementary and specialized experience and skills to developing a five-year strategic plan, in addition to training, and outreach services, in collaboration with SFPL leadership, staff, and stakeholders, that will drive the transformation required to achieve SFPLs strategic goals. The Leadership Team is composed of Project Lead Billy E. Vaughn, Ph.D. (Billy) of DTUI; Margaret Sullivan, MSS, with Patrick Quattlebaum, Harmonic Design, as Project Library Experts; and from SmithGroup, Georgia Sarkin, Social Infrastructure Director, and Rosa Sheng, Education & J.E.D.I. Director—who are all dedicated across the full spectrum of the strategic planning engagement.

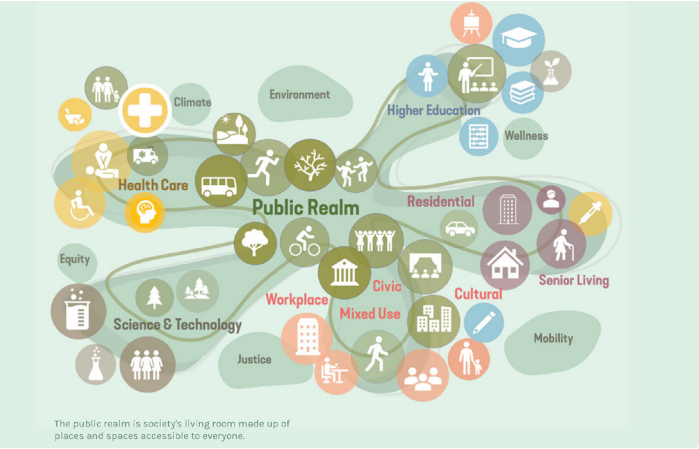
As **Project Lead, Billy** will guide the team, leading outreach, communications, engagement, document audit, assessments, and qualitative and quantitative analyses of the strategic planning process. He, along with the leadership team will develop the strategic plan documents to meet the City’s requirements. Since 1986, Billy has collaborated on strategic plans for the San Francisco Metropolitan Transportation Authority (SFMTA), City of Longmont, and the National Archives. His three-year contract with SFMTA included collaboration with community organizations, union representatives, and senior centers throughout the City. This work demonstrates his experience managing and leading projects of similar scope and size.

Margaret, Project Library Expert, will lead SFPL staff and leadership participation, the mission and values audit and development, demographic and trends analysis, and bring industry best practices to the process. She has collaborated with over forty public library systems, helping them to re-envision the 21st century library for diverse and complex contemporary communities, with a focus on America’s urban cities. Her work can be seen in public library systems from New York to Chicago, from the District of Columbia to Los Angeles.

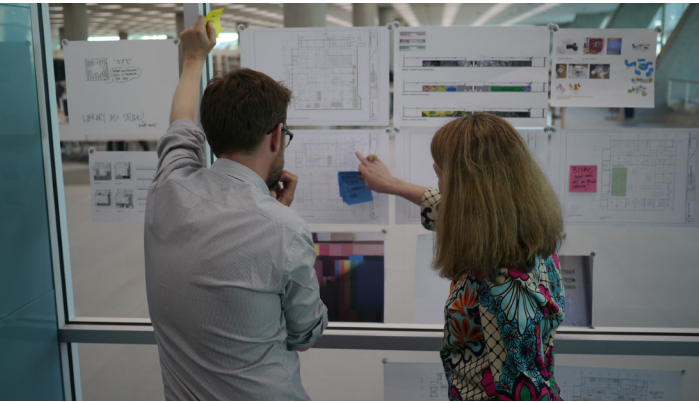
Patrick, Project Library Expert, will work with SFPL leadership, staff, and the consultant team to synthesize the community’s stories, needs, challenges, and ambitions to establish new or reimagine existing services, journeys, and experiences. He brings a human-centered service design mindset and shares methods for sustained organizational transformation to each project, including his work with public library systems in the District of Columbia, Salt Lake City, and Las Vegas-Clark County.

Georgia, Social Infrastructure Director, will contribute to robust community engagement and qualitative and quantitative data capture to generate strategies for the SFPL to enhance neighborhood social infrastructure through its library system. She will also provide analysis and recommendations for the development of resiliency hubs. An underpinning of all Georgia’s work over the last 25 years is a focus on creating equitable, resilient and sustainable cities. She has been the lead urban designer and project manager for the San Francisco Federal Building Plaza and Kwa-Zulu Natal Durban in South Africa. As one of the most comprehensive urban planning projects in the history of Post-Apartheid South Africa, the project focused on providing equitable spatial planning and architecture projects for community resilience and economic generation.

As **Director for Justice, Equity, Diversity, Inclusion, Rosa** will share her expertise creating flexible, inclusive learning environments that support the diverse needs of San Francisco’s varied and overlapping communities. Focused on higher education clients, Rosa has managed projects that minimize barriers for students, allowing them to maximize their full potential. Each project, from the new science building at San Francisco State University, to the STEAM Building at City College of San Francisco to the STEM Building at Santa Rosa Junior College, aims to foster a deep sense of belonging, persistence and other key determinants of success by providing innovative, inclusive and resilient strategies.



Kathy, Project Manager will provide leadership, overall stakeholder liaison, and will work with outreach contractors on the assessment, outreach and engagement phase of the project. She currently works with Billy, instructing adult learners through DTUI’s online cultural competence courses. She teaches the strategy planning course, which trains staff in



organizations to create a strategic plan and prepare them for presenting to their organization.

Michael, Assessment Expert, will work on the qualitative and quantitative data coding and analyses for SFPL. He brings experience working on strategic planning assessments, focus groups, and key informant interviews.

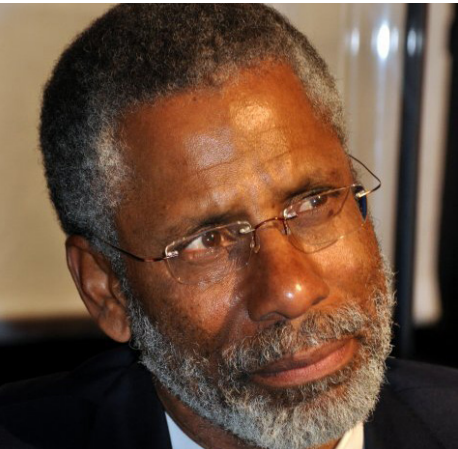
Two Rivers and The Contigo Team, Micro LBE contractors, will augment capacity for outreach, communications, and engagement as well as assessment interviews and focus group data collection. Their extensive outreach experience has resulted in a large network of connections with San Francisco organizations and individuals that will be critical for the success of this assessment project.

Strategic Planning Task Chart

Please see the Strategic Planning Task Chart on page 17, which maps the defined responsibilities of each of the three lead entities for each task, including their relative level of responsibility indicated as Prime, Partner, and Support.



BILLY VAUGHN



Billy E. Vaughn, Ph.D is a consultant, trainer, instructional designer, and organizational change expert. His specialty areas include strategic planning, training design and development, assessment and benchmarking, workplace inclusion, employee engagement, and racial equity. Billy has written numerous articles, several books, and developed tools and solutions recognized in his work. He is also an award-winning teacher.

Billy founded DTUI.com LLC in 1998 to provide consulting, training, and credentialing training for cultural diversity practitioners. He later created the freestanding corporate university, Diversity Executive Leadership Academy (DELA), to offer several professional credentialing training programs. DTUI.com serves as the consulting and training solutions part of the organization.

EDUCATION

- 1978 Bachelor of Science, UC San Diego
- 1980 Master’s degree studies, Long Beach State
- 1982 Master of Science UC San Diego
- 1986 Ph.D. Cultural-Cognitive Psychology

EXPERTISE

Billy is sought out for his strategic leadership, and deep expertise as a consultant and trainer. He has published several books on managing diversity and diversity training, professional papers on multiculturalism in organizations, the role of emotion in intercultural conflict and intercultural communication in organizations. Key expertise and focus includes:

- Management consultation
- Strategic planning
- Organizational Inclusion Assessments including qualitative / quantitative methods and analyses)
- Executive cultural competence facilitation
- Instructional design and distance learning
- Training design, development, and facilitation
- Racial equity facilitation

SPEAKING ENGAGEMENTS

- European Union Economic Growth & Innovation in Multicultural Environments conference (Leuven, Belgium)
- Arizona Minority Family Association, National Conference on Race and Ethnicity in Higher Education
- Conference on Migration and Workplace Integration (U. of Gothenburg, Sweden)
- Wright State University Diversity Day
- University of California
- National Conference on Race & Ethnicity in Higher Education
- Multicultural Advocates for Cultural Competence
- Tech Inclusion (San Francisco)
- Semrush (Black History Month)

LEADERSHIP

- Director - Diversity Executive Leadership Academy
- Senior Managing Partner
- Board member - Asian Americans in Public Affairs (San Francisco)
- Administrator at the California School of Professional Psychology (past)
- Past President, California Chapter of the National Association for Multicultural Education

MARGARET SULLIVAN



Margaret Sullivan is a nationally recognized thought-leader in visioning, strategic thinking, meaningful community engagement, and physical space design with a focus on public libraries and educational institutions. Collaborating with community leaders and national experts, Margaret positions the public library to lead the social justice agenda in their community, creating the conditions for communities to flourish with inclusivity and joy. She skillfully collaborates with stakeholders and the client team to strengthen community trust, build coalitions, amplify community alignments, and re-imagine the 21st century public library to honor communities’ aspirations. Margaret’s depth of understanding of the contemporary public library’s past, current, and future service models enables her to skillfully translate community goals into customized strategies, learning experiences, holistic service models, and culturally relevant public places.

EDUCATION

- 2001 Library Planning and Design Program Harvard Graduate School of Design Cambridge, MA
- 1996 Bachelor of Architecture Clemson University, Clemson, SC
- 1994 B.A., Art History Wake Forest University, Winston-Salem, NC
- 1994 National Building Museum Washington, DC
- 1993 Institute of European Studies Vienna, Austria

SPEAKING ENGAGMENTS

- Keynote Speaker “Library as Theater” Australia Library Awards (ALIA)
- WRLDCITY Conference, World Stage, “Libraries as the New Public Squares”
- “Centering the Community in Community Engagement,” New York American Institute of Architects (AIA)
- “Strategic Planning in a Deeply Weird World,” Public Library Association (PLA) Pre-Conference
- “Inclusionary Tactics that Flip the Script for Library Facility Planning,” Public Library Association (PLA) Conference
- “Creating Conditions for Communities to Flourish,” California Library Association (CLA) Conference
- “Designing Your Future World,” California Library Association (CLA) Conference
- “Designed for Experience: Re-imagining Spaces and Services,” Public Library Association (PLA) Pre-Conference,
- Next Library Conference, “Library as Studio”

PUBLICATIONS

- New York Times, Letter to the Editor, “Transforming Our Libraries” | 2020
- Brookings Institution, Placemaking Postcards, “How a New Haven Library is Connecting Residents to the City’s Innovation Economy” | 2020
- Library Journal, “The Future of Futures: Designing the Future”
- Contract Design Magazine, “Giving Back to the Local Community” | 2020
- Interior Design Magazine, “U.S. Designers Share Ways They’re Thinking Big During the Pandemic ” | 2020
- American Libraries Magazine, “Human-Centered Design” | 2020
- Contract Design Magazine, “On Our Radar: Margaret Sullivan” | 2019
- Interior Design Magazine, “20 Inspiring Female Designers to Know” | 2018
- Interior Design Magazine, “40 at 40: Young Firms are on the Up and Up” | 2017

LEADERSHIP

- Open House New York | Board President
- The Bronx Community Foundation | Strategic Advisor
- National Academy of Design | Advisor
- Institute for Museum and Library Services | Field Reviewer
- IIDA/ ALA Library Awards | Juror

PATRICK QUATTLEBAUM



EDUCATION

2002 Master of Science, Information, Design & Technology, Georgia Institute of Technology

1993 Bachelor of Arts, English, Honors College, University of South Carolina

Patrick Quattlebaum is a designer, consultant, and teacher who gets up every morning to bring creativity, rigor, and humanity to problem-solving. With two decades of experience in design strategy and service design, he places a premium on pushing design practice to be more value-centered, collaborative, and iterative. Along with co-author Chris Risdon, Patrick shares his design philosophy and its practical applications in *Orchestrating Experiences: Collaborative Design for Complexity* (Rosenfeld, May 2018).

- PUBLICATIONS**
- Book: *Orchestrating Experiences*, Patrick Quattlebaum and Chris Risdon (Rosenfeld Media) | 2018
- SPEAKING ENGAGEMENTS**
- Joint Futures Conference (Helsinki, Finland), “Orchestrating Experiences”
 - This is HCD (Dublin, Ireland), “Collaborative Design for Complexity”
 - ULC Urban Libraries Council, Lessons From the Field, “Service Design for Libraries”
 - PLA Conference, “Designed for Experience: Re-imagining Spaces and Services” Pre-Conference Speaker | 2016
 - Experience Mapping San Francisco, “Mapping Experiences and Orchestrating Touchpoints” Featured Instructor | 2016

GEORGIA SARKIN



EDUCATION

1994 M.Arch in Urban Design, Harvard Graduate School of Design

Bachelor of Architecture, University of KwaZulu Natal,

Bachelor of Architectural Studies, University of Cape Town

Georgia Sarkin is an award-winning architect, urban planner, and urban designer with success in leading complex urban design and planning projects in diverse settings. She has over 25 years’ experience including strategic planning, mixed use urban development transit-oriented development, campus planning, large scale master planning, and community development. She is committed to the advancement of equitable, resilient, connected and joyful cities. In her role as Principal and lead urban designer and planner at SmithGroup, she leads strategic interdisciplinary urban projects that are both visionary and implementable.

- PUBLICATIONS**
- [“Cities at the Frontline: Public Space in the Time of the COVID-19 Pandemic,”](#) Perspectives, June 2020
 - [“Equitably Resolving Public Space in the Time of COVID-19,”](#) State of Change: American Planning Association Special Edition, July 2020
 - [“Reimagining the Public Realm: A Framework to Build Resilient Communities During and After the Pandemic,”](#) Perspectives, October 2020
- SPEAKING ENGAGEMENTS**
- “San Francisco’s City Center: A Forum on the Future,” AIA San Francisco and San Francisco Chamber of Commerce, April 2021
 - “Public Space in the Time of COVID-19” AIA San Francisco, May 14, 2020
 - “Bay Area Equity, Inclusion, and Urban Planning,” Bisnow, July 2020
 - “Designing Elements of a Transformative Identity in Higher Education Institutions” SCUP 2018 Pacific Conference at UCLA

MICHAEL EATMAN



EDUCATION

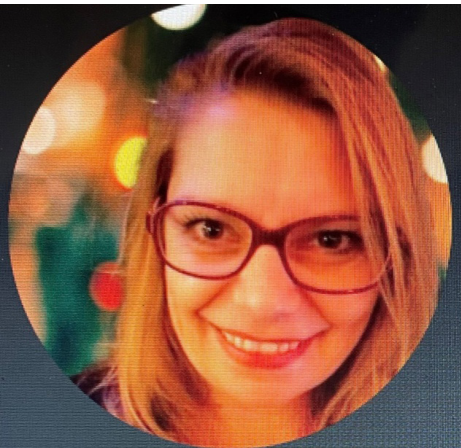
1990 Masters in Architecture II, Carnegie Mellon University, Cum Laude

1987 Bachelor of Arts in History, Saint Johns University, Cum Laude

Michael Eatman is a Certified Diversity Professional, Executive Coach, Advanced EQ, and Mindful Facilitation Practitioner. As an educator celebrating 28 years spanning Prek - 20 learning environments, Michael has created the Leadership Edge, a framework that incorporates Emotional Intelligence (EQ), Cultural Competence, and Conflict Engagement to support educational leaders in leading successful organizations. He believes that successful institutions start with leaders, armed with visions that beckon collaboration. Michael utilizes his EQ expertise to ground his diversity and educational leadership work.

- SPEAKING ENGAGEMENTS**
- “Social Justice and Equity Among Co-Teachers as a Pedagogical PPractice for Community Empowered Learning” presentation for The Practitioner Scholar Program at the University of Massachusetts Boston Fall 2019
 - “Advancing the 5 I’s of Inclusive Excellence: Community Identity, Involvement, Integration, and Impact?” presented to University of Pittsburgh Engineering Department NSF AGE PITT STRIVE PROGRAM Summer 2019
 - “Inclusion: Strengthening Community in Divided Times” presented at The Long Ridge School Spring 2017
 - “Developing an Inclusive Learning Institution” presented at The Epiphany School Summer 2017

KATHY SIMONIS



EDUCATION

2016 Certified Diversity Professional

2010 Macquarie and Mt Eliza Business School Executive Leadership Program

2002 Macquarie and Mt Eliza Business School Management Program

Kathy has worked in global financial services firms for over 25 years establishing and leading diverse teams across a range of operational, project, regulatory and risk management disciplines, in Australia, the United Kingdom and United States. Kathy’s passion for diversity and inclusion in the workplace saw her establish the Diversity and Inclusion (D&I) Strategy and function for the Macquarie Group in the Americas. In this regional leadership role she significantly influenced the global D&I efforts, internal and external benchmarking, and designed and launched a range of programs focused on cultivating inclusion, advocacy and sponsorship. Working in the corporate context, and for numerous not-for-profit organizations, as a board member, volunteer, or advisor, it is the long burning passion of advocating for people to help them be their best self within their community and professional context that energizes her focus.

- LEADERSHIP**
- Diversity Executive Leadership Academy – Advisory Board member
 - Consultant and Lead Faculty – DTUI.com LLC
 - Regional Head of Diversity & Inclusion, Americas Macquarie Group (2015-2021)
 - Regional & Global Leadership roles, Macquarie Group Australia, UK and US since 2000

ROSA SHENG



EDUCATION
1994 Bachelor of Architecture,
Syracuse University, Cum Laude

Rosa T. Sheng, FAIA, LEED AP BD+C is a Principal at SmithGroup serving as Higher Education Studio Leader in Northern California and Director of Justice, Equity, Diversity, Inclusion. She is also the founder of Equity by Design [EQxD] and the first Asian American Women to serve as AIA San Francisco President (2018) in the organization’s 136 year history. Recognized as a designer, architect, strategist and thought leader, she is known for delivering design solutions with transformational impact in the built environment.

- SPEAKING ENGAGMENTS**
- “Advocating for Essential Space Resources for Student Success,” Stanford First Generation Low Income (FLI) Conference, May 2021
 - “The JEDI Agenda – An Intersectional Approach to Designing a Resilient Future,” Living Future Conference, (International Living Futures Institute) April 2021
 - #EQxD2020 Series, AIA San Francisco
 - “Diversity, Equity, and Inclusion: A Conversation on the Profession of Architecture and Black Lives Matter,” AIA San Francisco, August 2020
 - “Exploring Equity, Diversity, and Inclusion in High Performing Teams,” Lean Construction Institute, May 2020
 - “Less Talk, More Action: Student Engagement Strategies for Equitable Project Outcomes”, SCUP Pacific Regional Conference, April 2020

LYNA VUONG



EDUCATION
2021 CORO New York Leadership
Class of 2021, New York, NY
2018 M.A. Food Studies
New York University, New York, NY
2005 B.A. Interior Design
Fashion Institute of Technology,
New York, NY

As Senior Designer at Margaret Sullivan Studio, Lyna Vuong has been designing public libraries with Margaret for over fifteen years. She brings over 15 years of experience in designing public spaces, community development, design production, and sustainable initiatives. Lyna is skilled at translating the goals of the community and utilizing human centered design to develop positive outcome goals for public buildings. Her current work focuses on visioning, strategy, and social impact through the lens of human-centered design. Lyna also has a Masters in Food Studies from New York University, where she focused on systematic food challenges as it relates to equity, economic, and educational wellbeing. Lyna is also co-founder of Happy Family Night Market, an annual celebration of the Asian diaspora. As Experience Design Director, Lyna ensures ideas come to life through designing, creating environments, and supporting programs that focus on human-centered design, food, sustainability, and experiential learning for our community.

- SPEAKING ENGAGMENTS**
- “Diversity, Equity, and Inclusion in Action,” ALA Symposium on the Future of Libraries
 - “Measuring the Library’s Impact,” ALA Symposium on the Future of Libraries
 - “Library as Studio Redesigning Existing Spaces,” Library Journal Design Institute
 - “Who Are We Designing for and Why? Service Design Techniques for Responsive Libraries”, WebJunction

CONTIGO



Contigo specializes in strategic communications, outreach and meaningful engagement of diverse hard-to-reach communities and stakeholders. Contigo, means with you in Spanish, and it is the firm’s belief that engagement begins and ends with deep listening. Contigo has extensive experience planning and facilitating productive engagement of diverse stakeholders on challenging projects. Projects have ranged broadly and include, school relocations, school resource planning, equity program planning and implementation, real estate mixed-use development projects, infrastructure and public space planning and strategic planning. This range of experience, accompanied by a proven track record, makes Contigo a nimble and capable partner in effective internal and external community engagement.

- The Contigo Team will be available to support the following:
- Raise awareness about the SFPL equity goals and project purpose;
 - Provide consistent/easy-to-understand communications regarding the SFPL’s strategic planning process;
 - Collaborate with the staff, partner organizations and community to develop a shared vision and action plans for establishing and/or improving the SFPL’s equity metrics
 - Engage with, and solicit input from, policymakers, the general public, and stakeholder groups as part of the strategic process, and in particular develop methods to obtain meaningful input from an array of stakeholders and possibly hard-to-reach-population segments.

TWO RIVER

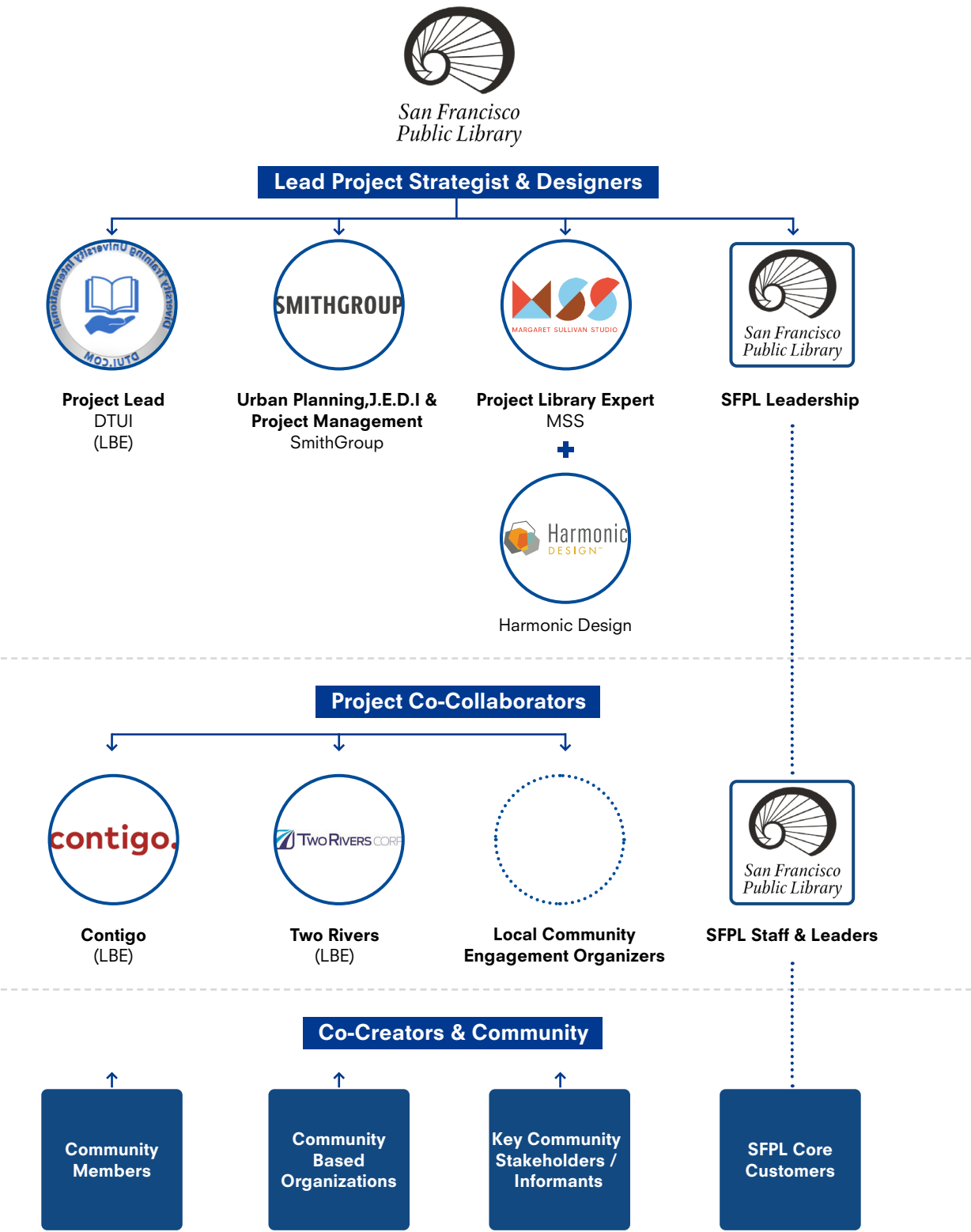


Two Rivers, Corp. (TRC) is a Women-Owned Small Business and certified Micro Local Business Enterprise in San Francisco that provides professional services specializing in change management. TRC’s Prosci® certified Change Practitioners have built a reputation for delivering high quality outcomes for large-scale technology projects impacting large groups of stakeholders. Change Management is a structured method for managing the people-side of change to achieve business goals and the required outcomes of a project or initiative. Successful Change Management can increase the speed of user adoption, ensure user satisfaction, and achieve ROI goals.

- SERVICES**
- Change Management & Readiness
 - Project/Program Management & Coordination
 - Training Planning & Development Services
 - Communications Planning & Execution

- CERTIFICATIONS**
- | | |
|--|--------------------------------------|
| • Prosci® Certified Change Practitioners | • Micro LBE, San Francisco #101379 |
| • Calif. Small Business, #2004444 | • SF CMD Cert. #CMD032017350 |
| • Micro LBE, San Francisco #101379 | • CPUC Diversity Supplier, #17000116 |
| | • SBA WOSB #3245-0374 |

TEAM ORGANIZATION CHART



“WE HAVE TO IMAGINE A DIFFERENT FUTURE, EVEN IF WE WILL NOT EXPERIENCE THAT FUTURE OURSELVES.”

Dr. Angela Davis in conversation with Dr. Mary Wardell-Ghirarduzzi, President, San Francisco Public Library Commission

We will Deliver:

1. A bold, inspirational **Vision** for a **Just, Prosperous, Equitable** San Francisco.
2. A confident **Mission** with a clear role and purpose for the San Francisco Public Library to lead a values-driven **Social Infrastructure** and **Community Economic Development** strategy, **centering** all.
3. **Values** designed for **radical Inclusion, radical listening, and radical learning**.
4. An organizational **operating system** that will be the “**Next Practice**” for 21st century public library work in **complex urban communities**, embedding **Coalition Building** and **Community Feedback Loops** in San Francisco Public Library’s daily practice to continuously enable data and best practices to inform collections, programming, services, and capital decisions in a rapidly changing **San Francisco**.
5. This work will generate these **Strategic Outcomes**:
 - SFPL will be an institution designed by the **community’s voices**, adapting services in real time to evolving **community conditions** with creativity and collaboration.
 - SFPL will **connect, convene, and catalyze** San Francisco’s public service eco-system for **amplified social impact** in service to San Francisco’s diverse communities.

Empowering SFPL with an activation strategy outlined in the following Deliverables:

			
Strategic Planning Document	Appendix	SFPL Toolkits	SFPL Field Guide
<ol style="list-style-type: none">1. Vision2. Mission3. Values4. Strategic Initiatives5. Strategic Implementation and Assessment Goals	<ol style="list-style-type: none">1. Community Acknowledgments2. About the Process3. Audits, Inputs, and Analysis4. Demographic Analysis5. Business and Operations Scenarios	<ol style="list-style-type: none">1. Community Engagement Toolkit2. Strategic Framework Toolkit3. Strategic Process Worksheets4. Assessment Methodologies	<ol style="list-style-type: none">1. A pocket-sized strategic document to guide and inspire staff and partners daily

Citation: The Davies Forum, University of San Francisco, “Post-Election Roundtable Discussion with Dr. Angela Davis, Moderated by Dr. Mary Wardell-Ghirarduzzi, Fall 2020” (2020). The Davies Forum. 1. <https://repository.usfca.edu/daviesforum/1>

QUALIFICATION SUMMARY

We are an unparalleled team of leading national thought leaders and practitioners who are re-envisioning the library for the 21st century, pioneering equity and inclusion strategies for organizations, and engaging and activating communities in San Francisco and across the nation. We have extensive experience working on projects of similar complexity to San Francisco Public Library's project that address strategic visioning, stakeholder trust building and outreach, quantitative and qualitative data capture and analysis, and sustainability for impactful results within a context of rapidly changing circumstances and unknowable futures.

Motivated by our aligned values, we will drive a visionary yet actionable strategic planning process in partnership with SFPL that can be readily used to inform service-driven, equity-minded programming and capital investments.

Building Strategy Through an Implementation Perspective

When we design a plan, it is much more than a material product that is delivered—it provides a direction and capability for an organization to grow. For SFPL, the strategic planning process will become a preliminary journey and experiential learning tool enabling the Library to confidently rethink strategies, reimagine service models, and grow service design capacity in support of sustained transformation. Additionally, since we are planners and designers, as well as implementers, we bring a rare perspective to the strategic planning process that is informed by current, real world knowledge and that allows us to always hold implementation in mind as the final outcome.

Designing Strategies and Service Design Experiences for Urban Libraries

Our team is passionately driven by our desire to create change for social justice, inclusivity, the environment. MSS is dedicated almost exclusively to advancing the role of the American Public Library as a vehicle for inclusivity and community transformation—the only firm distinguished as such in the country. MSS has become the industry leader in re-envisioning the 21st century library for diverse and complex contemporary communities, with a focus on America’s urban cities. The Studio has collaborated with over forty public library systems, along with the following urban library systems, to provide strategic planning, facilities master planning, visioning, programming, curriculum development, architectural design, and staff professional development: **New York Public Library, DC Public Library, Chicago Public Library, Cleveland Public**

Library, Charlotte-Mecklenburg Public Library, Fort Worth Public Library, Las Vegas-Clark County Public Library, Los Angeles Public Library, Prince George's County Memorial Library System, Richland (SC) Library, Salt Lake City Public Library, and Salt Lake County Public Library.

Our team is joined by Patrick Quattlebaum, Harmonic Design, a firm specializing in human-centered service design and a long-time collaborator with MSS, such as with Richland Library's Executive Director, Melanie Huggins to develop the innovative "Library as Studio" model, which provides a variety of creative spaces to strengthen community connections and catalyze a creative economy. Patrick also trained staff in service design, building capacity to reimagine service and customer experiences.

The 21st Century Library in 2021

The 21st century public library repositions itself from a well-intentioned passive entity into an active, intentional, and synergistic force providing meaningful community impact. Today, libraries are expected to offer a spectrum of services and functions for a variety of users influenced by myriad conditions—all for the diverse communities they serve. Major urban libraries such as SFPL have enormous responsibilities to fulfill, yet today especially, there is also an incredible opportunity for libraries to positively influence communities and foster economic development.

Yet to be truly transformational institutions, the public library must adopt new approaches that radically depart from the standards, benchmarks, metrics, and trends of the past. SFPL is already embracing the 21st century library paradigm across its 27 branches. The BLIP campaign has successfully revitalized the majority of its branches, all while receiving consistently excellent ratings from its users.

The Urban Impact Model

MSS stands out as an industry leader that activates the 21st century library to achieve significant social outcomes by generating connections, building coalitions and revitalizing economies. The Studio's revolutionary mission-driven industry projects include:

- ImaginOn, the Joe and Joan Martin Center, “the first library of the 21st century”
- DreamYard Arts Center in the South Bronx, YOUmedia/ Connected Learning prototype, with Chicago Public Library

- Library as Studio, an innovative methodology for human-centered 21st century facilities design, with Richland Library and Harmonic Design
- Here-to-Here—aka Grit Lab—a collective impact youth career pathways non-profit forging financial sustainability and economic impact for The South Bronx
- Salt Lake City Public Library's groundbreaking Strategic Roadmap, with Harmonic Design

These mission-driven models produce meaningful outcomes by using programming and place to foster community connections and coalition building. They weave together a social infrastructure of partnerships that enables them to forge collective action and collaborative advocacy that soon become deeply embedded in their communities, enriching them and in some cases sustaining them. Our outcome-focused process has proven to leverage community leaders, organizations and assets for a collaborative impact model that, if successful, takes on a life of its own.

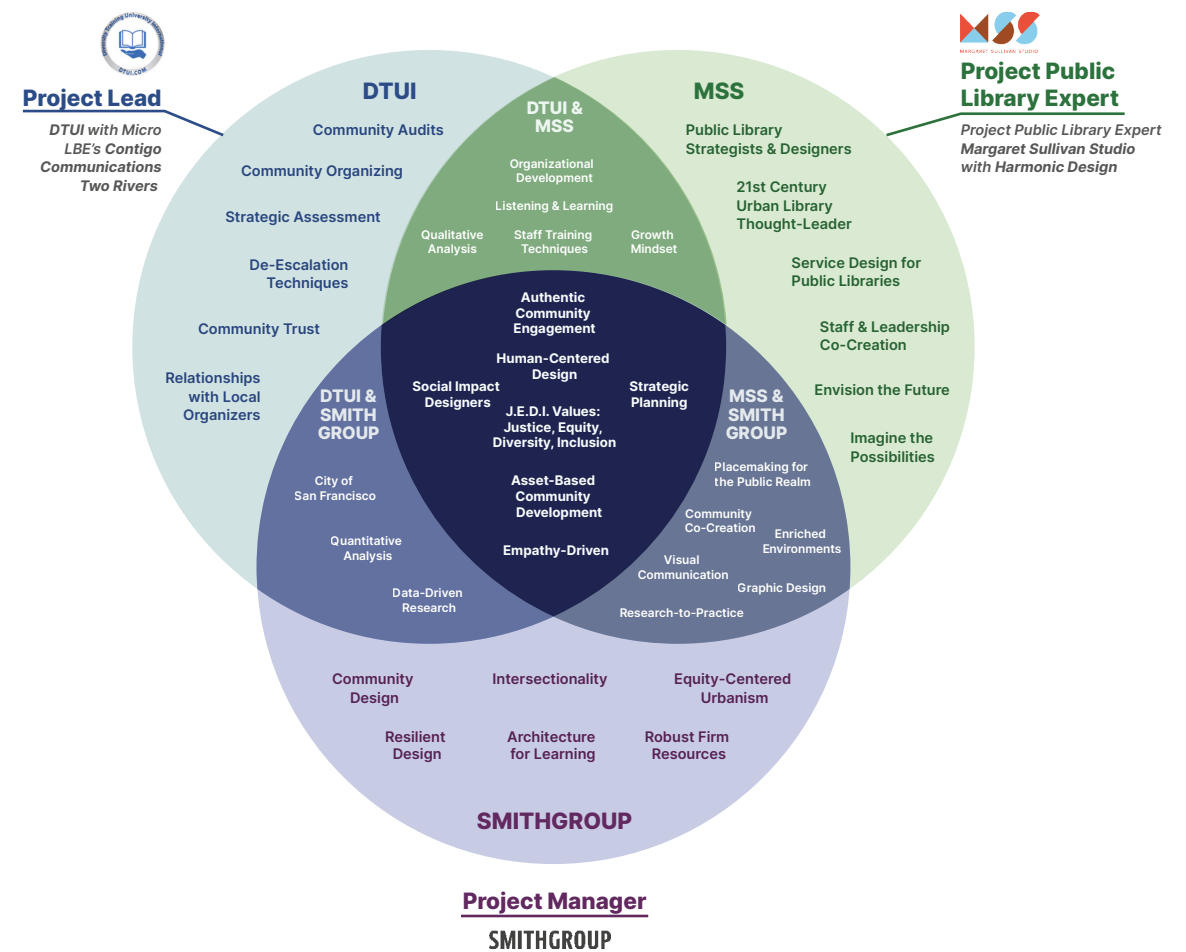
In 2020, at the height of the pandemic, funding was cut for [Youth Empowerment Summer](#) (YES), New York City's Summer Youth Employment Program and the largest youth employment program in the US. This triggered a rapid response ecosystem

of advocates, educators, community leaders, and youth activists who mobilized to leverage a wide array of collective action interventions. Here-to-Here, designed by MSS, was one of those players.

YES's work to restore funds for the City's youth employment program employed collaborative advocacy - from SYEP providers, informal community learning organizations, and teen activists. As an effective model that engendered meaningful connections, Here-to-Here, revealed how such networks can make movements happen.

Engaging Community the J.E.D.I Way

Knowledge is not the only product of the 21st century public library. Our work, in fact, asserts that empathy is the strongest asset of the contemporary library to foster and advance community. Justice, Equity, Diversity, and Inclusion, tenets to our planning approach, which builds the framework for incorporating diverse voices. We will collaborate with SFPL staff, partner organizations and the community to advance its equity metrics, especially with Rosa and Billy on our team, SmithGroups's Director of Justice, Equity, Diversity, and Inclusion, and founder of DUTI's Diversity Executive Leadership



03 QUALIFICATIONS SUMMARY

Academy (DELA) respectively.

An Adaptable Approach to an Uncertain Tomorrow

Our strategic plan development with SFPL will drive an adaptive library system to anticipate and respond to San Francisco’s neighborhoods as they continue to evolve in the face of rapid cultural, environmental, and technological change, including planning for climate hazards with resiliency hubs. The public library is an “uncommon common ground” for our cities and communities—not many public institutions enjoy its level of public trust. Our team will work with SFPL to maximize this invaluable relationship with its communities to create a new paradigm for urban life.

Strategic Assessment and Planning

All three key partners have developed numerous strategic plans for a variety of clients; and with similar timeframes to SFPL’s strategic work, three of our major national library systems will inform the project with valuable case studies.

Project Management

Georgia and Rosa, with extensive experience with large complex urban planning and academic projects, have evolved comprehensive strategies for project management.

Connecting, Engaging and Communicating with SFPL’s Stakeholders

Our approach to the strategic process ensures that SFPL’s plan will be guided by the voices of all of San Francisco’s diverse

communities and residents. The Contigo Team with DTUI know and appreciate the varied richness of San Francisco and its micro-communities. Key team members, Billy, Rosa, Georgia, and Patrick Quattlebaum, also have considerable outreach experience and alignment with the City’s people and neighborhoods.

Qualitative and Quantitative Data Gathering and Analysis
DTUI, MSS, and SmithGroup will all contribute their considerable resources and capabilities for the qualitative and quantitative data analysis required for SFPL’s Plan. SmithGroup will also provide additional capacity to the team’s data collection and analysis resources via its in-house data analytics team. MSS will not only deliver benchmarking studies, but also case studies of public libraries that have embraced similar bold visions.

Strategic Plan Document Materials Development and Presentation Support
For SFPL, MSS will produce thoughtful and creatively designed strategic plan documents, including toolkits, workshop books, and strategic road maps, in support of innumerable public library planning projects. All Team Partners are exceedingly qualified to provide presentations.

As-Needed Consulting
All team members take on extended as-needed consulting work that often follows intense engagements are available to continue to offer such services to SFPL.

“

The J.E.D.I. Manifesto

Today, we pledge to confront the past and take actions to dismantle systemic racism, injustice, and inequity within our society in order to improve the human condition. This requires a framework that intentionally champions Justice, Equity, Diversity and Inclusion [J.E.D.I.] in our work and planning process. The ordering of the four words is intentional to remind us of the priorities that make lasting, impactful and sustainable change. Justice - recognize and abolish the policies and practices that have historically oppressed and disenfranchised individuals’ and communities’ access to the environment, health, and socioeconomic mobility. Equity – create equitable frameworks that mitigate challenges and barriers resulting from unjust policies and practices. The metrics of these efforts applied to our collective work will be Diverse representation and Inclusive outcomes.

We commit to the City of San Francisco Public Libraries (SFPL) to design a better future - which goes deep and beyond performative words to meaningful action. Each of our team members in this proposal is passionate and vested in the J.E.D.I. Agenda of shared mission, values and strategic vision – which we believe is directly aligned with SFPL’s Strategic Planning work. This team has been brought together to offer a unique set of complimentary experiences and well-established reputation in strategic planning, community engagement, public libraries, innovative problem solving and design excellence. We have worked on projects of similar complexity that address strategic visioning, stakeholder trust building, sustainability, fiscal responsibility. Our goal is to lead the process based on a just and equitable framework that capture the voices of the San Francisco communities and reinvigorate spaces that champion lifelong learning to advance the future ready resilience of people, places and planet. It is our hope that the outcomes of the SFPL Strategic Planning effort will contribute to solving critical challenges that we collectively face today - so that we can create a better future for our communities and society at large.

”

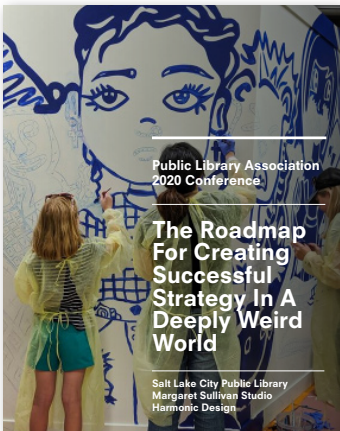
TASK	DTUI WITH CONTIGO & TWO RIVERS	MSS WITH HARMONIC DESIGN	SMITHGROUP
	PROJECT LEAD	PROJECT LIBRARY EXPERT	PROJECT MANAGER
1. OUTREACH & COMMUNICATIONS			
1. Generate SFPL staff and leadership participation	Support	Prime	Partner
2. Generate stakeholder participation	Prime	Partner	Partner
3. Develop a communications/outreach plan, which includes incentivizing potential participants for recruitment	Prime	Partner	Partner
4. Deployment plan with timeline and engagements with SFPL liaisons	Partner	Support	Prime
2. DOCUMENT AUDIT			
1. Utilize appropriate SFPL data resources	Prime	Partner	Support
2. Missions and values audit	Partner	Prime	Support
3. Review relevant past efforts and related documents	Prime	Partner	Support
4. Demographic analysis of current SFPL usage and projections for the next five years with emphasis on racial equity and community trends	Partner	Prime	Support
5. Best and leading practices from peer libraries and industry organizations for library services	Partner	Prime	Support
6. Analysis of the city’s emerging resilience needs as documented in the Hazards and Climate Resilience Plan and Climate Action Plan	Partner	Support	Prime
3. ASSESSMENT INTERVIEWS (OUTREACH, COMMUNICATIONS, & ENGAGEMENT)			
1. Interviews and focus groups to hear staff, leadership and stakeholder views	Prime	Partner	Partner
2. Incorporate the stakeholders	Prime	Partner	Support
3. Use of other data collection tools as deemed useful and appropriate	Partner	Partner	Prime
4. Written summary of the qualitative data collected from the interviews	Prime	Partner	Support
4. ASSESSMENT SURVEYS (OUTREACH, COMMUNICATIONS, & ENGAGEMENT)			
1. Design tailored quantitative surveys	Prime	Partner	Partner
2. Analyze the results	Prime	Partner	Partner
3. A written summary of the quantitative data collection results	Prime	Partner	Partner
5. COMBINE QUALITATIVE AND QUANTITATIVE ANALYSES			
1. Combine qualitative and quantitative data	Prime	Partner	Partner
2. Write up a summary, conclusions, and recommendations	Prime	Partner	Partner
6. STRATEGIC PLAN DOCUMENTS			
1. Develop a strategic plan based on the recommendations	Prime	Prime	Prime
7. PROJECT MANAGEMENT			
1. Designate a project manager and assistant project manager	Support	Prime	Prime
2. Develop a project management plan that includes an understanding of the goals and context, deliverables, and milestones	Partner	Partner	Prime
3. Organize a Stakeholder Kickoff	Partner	Support	Prime
4. Calendar project team meetings	Partner	Support	Prime
5. Document the process, engagement efforts, and deliverable development	Partner	Partner	Prime
8. PRESENTATION			
1. Collaborate with SFPL liaisons for the project to develop a presentation	Partner	Prime	Partner
2. Co-present with a SFPL designated staff	Partner	Prime	Partner

Relevant Project Experience					Community Engagement				Organizational Development			Strategic Plan Deliverables			
					One-on-one Key Stakeholder Conversations	Community Based Organizations Emgagement	"Grassroots" Community Engagement	Community Surveys	Leadership Engagement	Staff Engagement / Professional Development	Implementation Planning	Audits, Analysis & Synthesis	Strategic Plan	Appendix	Toolkit
SALT LAKE CITY PUBLIC LIBRARY	2014 - Present	\$16 Million / 8 Facilities / 335,000 SF/ 300 Employees	MSS with Harmonic Design	Strategic Planning, Master Facilities Planning, Community Engagement, Architecture and Interiors, Staff Day	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LAS VEGAS-CLARK COUNTY LIBRARY DISTRICT	2015 - Present	\$59 Million /26 Facilities / 1,000,000 SF/ 700 Employees	MSS with Harmonic Design	Strategic Planning, Master Facilities Planning, Community Engagement, Architecture and Interiors, Staff Day	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
PRINCE GEORGE'S COUNTY MEMORIAL LIBRARY SYSTEM	2019 - Present	\$33 Million /19 Facilities / 217 Employees	MSS with Harmonic Design	Strategic Planning, Staff Day	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
FORT WORTH PUBLIC LIBRARY	2017 - 2018	\$17 Million /16 Facilities / 143,000 SF/ 207 Employees	MSS with Harmonic Design	Strategic Planning, Staff Day	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
NEW YORK PUBLIC LIBRARY	2016 - 2017	\$300 Million / 92 Facilities / 646,000 SF/ 3150 Employees	MSS with Harmonic Design	Strategy, Master Facilities Planning, Architecture and Interiors, Leadership & Staff Engagement		✓			✓	✓		✓	✓	✓	✓
DC PUBLIC LIBRARY	2019	\$65 Million /25 Facilities / 900,000 SF/ 600 Employees	MSS with Harmonic Design	Strategy, Visioning, Facilities Planning	✓				✓	✓		✓	✓	✓	✓
RICHLAND (SC) LIBRARY AS STUDIO	2015-2020	\$26 Million /13 Facilities / 300,000 SF/ 300 Employees	MSS with Harmonic Design	Strategy, Master Facilities Planning, Architecture and Interiors, Leadership & Staff Engagement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
THE BRONX COMMUNITY FOUNDATION'S NETWORK	2012 - Present	N/A	MSS with Harmonic Design	Strategy, Organizational Development, Coalition Building, Communy Engagement, Pro-Bono Design	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ALTADENA (CA) LIBRARY DISTRICT	2019	\$4 Million /2 Facilities / 24 Employees	MSS	Strategic Planning, Community Engagement, Board & Staff Engagement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ANNE ARUNDEL COUNTY (MD) PUBLIC LIBRARY	2015 - 2019	\$29 Million /27 Facilities / 300 Employees	MSS	Strategic Planning, Community Engagement, Architecture and Interiors	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
BOULDER PUBLIC LIBRARY	2016	\$10 Million /3 Facilities / 41 Employees	MSS	Strategic Planning, Community Engagement, Master Facilities Planning	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CONTRA COSTA COUNTY (CA) LIBRARY	2018 - Present	\$57 Million /26 Facilities / 194 Employees	MSS	Customer Experience Guide, Community Engagement, Architecture and Interiors				✓	✓	✓	✓	✓	✓	✓	✓
FRESNO COUNTY PUBLIC LIBRARY	2017	\$24 Million /34 Facilities / 700 Employees	MSS	Strategy, Master Facilities Planning, Leadership & Staff Engagement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GRAND RAPIDS PUBLIC LIBRARY	2018	\$9 Million /8 Facilities / 102 Employees	MSS	Strategic Planning, Community Engagement, Architecture and Interiors		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
SAN FRANCISCO METROPOLITAN TRANSIT AUTHORITY	2019 - Present	4800 employees	DTUI	Strategic Planning, Community Engagement, Urban Planning	✓	✓	✓	✓							
PG&E POTRERO AND HUNTERS POINT POWER PLANT CLEANUP PROJECTS	2020	N/A	Contigo Communications	Community Engagement					✓	✓		✓	✓		
SOUTHERN ILLINOIS UNIVERSITY LIBRARY	2015	N/A	DTUI	Strategic Planning, Organizational Development						✓		✓	✓		
NATIONAL ARCHIVES	2014	N/A	DTUI	Strategic Planning, Organizational Development	✓	✓	✓	✓	✓	✓					
SOUTH SAN FRANCISCO CIVIC CENTER PUBLIC LIBRARY	2019 - Present	\$120 Million 80,000 SF (Library)	SmithGroup	Strategic Planning, Community Engagement, Urban Planning	✓	✓	✓	✓	✓				✓		✓
SAN FRANCISCO FEDERAL PLAZA ENGAGMENT	2019 - Present	1.6 Acre	SmithGroup	Strategic Planning, Community Engagement, Urban Planning	✓	✓	✓	✓	✓	✓		✓	✓		
SANTA CLARA CIVIC CENTER	2019 - Present	\$200 Million/21 Acre Campus	SmithGroup	Strategic Planning, Community Engagement, Urban Planning	✓	✓	✓	✓	✓	✓		✓	✓		

SALT LAKE CITY PUBLIC LIBRARY
STRATEGIC VISIONING & ROADMAP
STRATEGIC PLANNING IN A DEEPLY WEIRD WORLD
SALT LAKE CITY, UT



[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



The Context & Call to Action

Margaret Sullivan Studio (MSS) began working with Salt Lake City Public Library in 2016 with a Visioning and Programming contract to re-image three existing facilities. That work introduced The City Library to the human-centered, community-driven service design methodology. Informed by community needs research, community engagement synthesis, and an “imagining the possibilities” education, staff designed future customer experiences activating the library’s holistic service model (spaces, collections, technologies, staff skills and talents, and partnerships) in highly participatory workshops, designed and facilitated by MSS. Resulting in a deeper understanding the powerful role facilities perform to activate 21st century learning, staff were invigorated by their learnings, their contributions, and were affirmed when MSS was able to clearly articulate their vision for the community’s future library experiences, rooted in patron’s needs and aspirations, in a qualitative and quantitative program narrative to inform future facilities design projects.

Peter Bromberg, Director of Salt Lake City Public Library, saw the value in this iterative and inclusive design methodology that built on the strengths and assets of the community and The City Library’s existing deep values-driven culture, and approached Margaret Sullivan with the following three “How Might We” challenges:

DATES | 2017-PRESENT
COST | \$90,000
ROLE | STRATEGIST, DESIGNER,
PROFESSIONAL DEVELOPMENT
BUDGET AND SCHEDULE MET
STAFF | MARGARET SULLIVAN, LYN A VUONG
CLIENT | DEBORAH ERHMAN, ACTING DIRECTOR
REF | 801-259-1154, DEHRMAN@SLCPL.ORG

- How might we apply this methodology to The City Library’s upcoming strategic planning process to create an adaptive organization to meet the needs of a complex, diverse community in a radically uncertain future world?
- How might we professionally develop staff to be able to show up each day with strategic intention, and to confidently practice 21st century librarianship by adapting and responding in real time to the community’s needs to create unique “customer services journeys,” and “moments that matter?”
- How might we use this process to co-create a flexible, adaptable Strategic Roadmap with Salt Lake City’s community development ecosystem, including city leaders, community-based partners, staff, and board to embed collective impact, deepen the community feedback loops, and inspire strategic partnerships through shared social impact outcome goals?

Designing the Methodology: Setting a Revolutionary Process up for Success

MSS, having worked with Patrick Quattlebaum to create Richland Library’s Library as Studio, invited his newly formed Studio to design the 1st of its kind Strategic Planning

methodology to respond to Peter Bromberg’s Call to Action. Over the next month, MSS, Studio PQ (Harmonic Design) and City Library leadership created a methodology, approach, tools, and five-phase, year-long work plan.

MSS and Studio PQ (Harmonic Design) managed the process, facilitated community engagements, designed the innovative participatory workshops and the innovative tools, and audited, analyzed, and synthesized the inputs to ensure the goals of each phase were met to meet the project’s milestones. Because it was the first of its kind strategic planning work undertaken by the library industry as well as the Salt Lake City Public Library, the team built in assessment and re-alignment procedures through weekly meetings to adjust the process as needed in real-time. Key to the success was creating a culture among the project leaders of encouragement, inspiration, openness, lack of judgment, collaboration, high trust, constant communication, and the “forgiveness of failing forward,” critical best practices required of growth, change, and innovation.

The Impact: Revolutionizing the Library Industry through Community Co-Creation

The work resulted in the following:

1. A community and staff co-created a nimble Strategic Roadmap with a flexible set of guiding strategic areas of focus that have only been continuously “practice, prototype, assess, and refine” forming a dynamic adaptive organism in total service to the community.
2. Positioned The City Library as a lead convener, connector, and catalytic contributor in Salt Lake City’s community economic development eco-system. SLCPL enjoys the community’s trust, knows the community’s needs, provides data-driven evidence in support of the community’s needs, and brings partners together to design services to generate shared social impact outcome goals.
3. Professionally developed staff with human-centered service design techniques. SLCPL built radically inclusive practices of empathy, compassion, and sensemaking with storytelling and designing customer journey narratives. This enables a “take action” entrepreneurialism through a culture of creativity, collaboration, and critical inquiry, rooted in designing experiences for all.
4. Professionally developed the staff to have the confidence, competencies and tools to embrace change, envision and

design future patron services, and grow internal systems to create meaningful experiences for all patrons. This ensures short term and long-term work is in service to the community’s advancement.

5. Built in effective measurement and assessment tools in order to rapidly re-align institutional operations for relevant and specific strategic outcome goals, applying the deep understanding of the “in-real-time” aspirations, needs, challenges of patrons, partners, and the community to generate strategic impact.
6. Emboldened the value proposition of The City Library with a new Culture Statement (organizational values) Experience Principles (how to create awesome customer experiences), and a re-commitment to the Mission. With these as the constants, The City Library staff is empowered with both a clear guide to how to approach services with shared expectations and accountability, and the entrepreneurial mindset, empowered by the tools and permissions to improve services, create new services, and to abandon services that are not impactful.

Generating Organizational Stability: An Adaptable Machine Embracing Change

MSS has been involved for over six years with The City Library, applying the inclusive design methodology as a library strategic consultant, community relationship building, designer, and inspirational staff facilitator. The City Library, led by Peter Bromberg and Deborah Erhman is also experiencing a leadership transition, as Peter Bromberg resigns to focus on his work with Every Library. It is through this that we are witnessing the most important aspect of this strategic work. With a confident Vision, Values, and Mission, the Strategic Roadmap is enabling a stable and healthy transition of leadership as Deborah Erhman becomes the Acting Director. The board, leadership, and staff continue to be guided by this groundbreaking work.



[CLICK HERE FOR REFERENCE DOCUMENTS.](#)

LAS VEGAS-CLARK COUNTY
LIBRARY DISTRICT
VISION 2020 STRATEGIC PLANNING &
IMPLEMENTATION
WE DON'T LIBRARY LIKE WE USED TO!
LAS VEGAS, NV

DATES | 2016-PRESENT
COST | \$200,000
ROLE | STRATEGIST, DESIGNER,
PROFESSIONAL DEVELOPMENT
BUDGET AND SCHEDULE MET
STAFF | MARGARET SULLIVAN, LYN VUONG
CLIENT | DANIELLE P. MILAM, DIRECTOR OF
REF | DEVELOPMENT AND PLANNING
(702) 507-6179, MILAMD@LVCCLD.ORG



[CLICK HERE FOR REFERNECE DOCUMENTS.](#)

The Context and the Call to Action
No other city, county or region in this country experiences the extreme booms and busts more than Las Vegas. The uncertainties and the exponential demographic shifts that occurred post 2008 in Clark County offers learnings relevant to understanding San Francisco’s rapidly changing future demographic and the implications for social, learning, and workforce needs and, ultimately, for the city’s library.

In 2015, Las Vegas was still coming out of the 2008 recession and continued to demonstrate stagnant recovery, growing economic disparity, a rapid increase in immigrant communities, and an immediate need to create pathways for middle class financial security.

In response, the Las Vegas Clark County Library District (LVCCLD) embarked on research with over thirty “early adopter” staff members to foster social impact in the context of an urban—or economic development—agenda that would galvanize recent program innovations, partnerships, and assets as well as activate the library’s 30 urban and rural library buildings.

A Process for a Vision
This launched Vision 2020, which provided insights into customer demographic conditions; future competitors, such as Amazon, Google, Starbucks; and future growth and change for the library’s business model. Needing a process for acting on these insights, the library was especially interested in Richland Library’s “Library as Studio” methodology developed with Margaret Sullivan Studio (MSS) , which is grounded in human-centered, community-driven and co-creation approaches aligned with a city’s urban agenda.

MSS was engaged in 2016 to build on the Vision 2020 work, to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives. MSS began by auditing and synthesizing a newly commissioned market segmentation analysis, a [revolutionary approach](#) for libraries, that revealed lifestyle behaviors combined with behavioral use-patterns of core customers.

With the synthesized analysis, MSS designed the second half of the strategic process to identify strategic areas of focus, such as defining future services, programs and collections to meet

the needs of the complex community conditions. and to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives.

MSS conducted a staff engagement workshop process to elicit deeper insights, asking: Who are we Designing for and Why? What are the Community Characteristics? What activities and programs will we provide? What are the outcome goals we envision for our community members?

A Bold Vision for Community Impact
It yielded a bold vision to grow the library business as a leader of the Vegas Valley, using the urban agenda concept as well as community economic development best practices, such as building and amplifying partnerships, aligning strategic priorities, and enhancing coalitions and funding sources. Additionally, it:

- Provided LVCCLD leadership with knowledge for growing their market share, the ability to apply market segmentation patterns and behaviors to grow relevant services, and confidence for focusing their capital investment and facilities growth strategies.
- Allowed staff members to focus on their business growth at a relevant localized community level while LVCCLD leadership developed curricula including for whole family development, new immigrant services, workforce development, and cultural programming.
- Set system-wide customer experience expectations and empowered the staff to design their customized community playbook, while aligned as a system.

Following this strategic work, MSS has continued to work with the District as library strategist, facilities designer, and staff development consultant. Serving as an integrated collaborator to the Executive Leadership Team, and in partnership with expert consultants (including Harmonic Design) for a series of consulting contracts, MSS’s continuous engagement has been critical to the successful implementation of the Vision 2020 strategy.

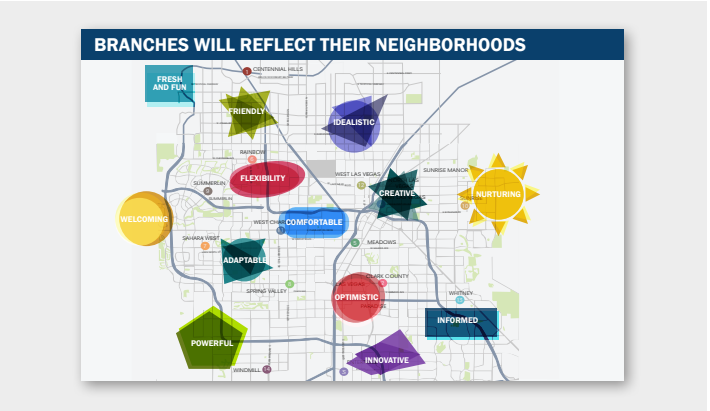
Subsequent projects have included the LVCCLD’s innovative facilities master plan, its implementation and the design of

two revolutionary facilities informed by placemaking and cultural relevancy—East Las Vegas and Mesquite. The trusted relationships, teachings, and inspiration MSS has contributed as an integrated collaborator and thought leader has allowed the ongoing professional growth and evolution of over 700 staff and strategic partners.

In a recent staff survey, 75% of staff believe this community-driven agenda is core to the library’s role, and they are confidently aligned with Vision 2020’s strategic areas of focus. Vision 2020 also grew foundation and development dollars, with an early childhood initiative based on Mind in the Making (Bezos Foundation), and teen and youth development out-of-school-time initiatives (Best Buy).

Most importantly for current conditions, Vision 2020 increased LVCCLD’s visibility and credibility with the critical partners necessary for a collective impact model as Vegas comes out of the pandemic crisis. This includes working with Nevada One Stop to help significant numbers of unemployed find living wage work; and the Nevada Children’s Museum on a strategy to address the 75% reduction in FNN early childcare providers for service industry families.

The strategy did what it was designed to do to generate a daily community impact: created adaptable facilities and a change-ready staff equipped to mobilize new services, as well as provided the tools for all staff to activate and optimize LVCCLD’s resources.



PRINCE GEORGE’S COUNTY
MEMORIAL LIBRARY SYSTEM
STRATEGIC PLANNING
LEADING THE ANTI-RACIST LIBRARY MOVEMENT
PRINCE GEORGE’S COUNTY, MD

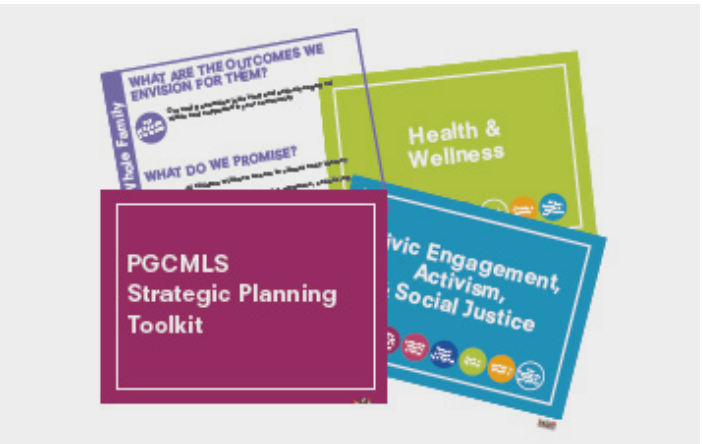


[CLICK HERE FOR REFERENCE DOCUMENTS.](#)

The Context and the Call to Action
From 2019 to 2020, Prince George’s County Memorial Library System (PGCMLS) staff, the Board of Library Trustees, and community stakeholders engaged in a strategic planning process led by Margaret Sullivan Studio (MSS). The purpose of this effort was to examine how the community in Prince George’s County utilizes the Library’s resources, services, and spaces. The Strategic Framework 2021-2024 reflects the challenges and opportunities posed by the global events of 2020, demonstrating the central role in the life of Prince George’s County. Staff and Margaret Sullivan Studio conducted one-on-one interviews with community members and stakeholders, conducted a county-wide survey (with over 4,000 responses) about how the Library should evolve its services, and facilitated workshops to develop and envision the future direction for PGCMLS. The results include a new mission, vision, and values for the library, as well as a commitment to building relationships throughout the community to amplify all that PGCMLS offers community members as they strive to reach their potential at every stage of life.

With a newly appointed CEO, Roberta Phillips began her leadership with a clear Board directive to re-position the library system as a community-centered, social justice organization to

DATES | 2019-2021
COST | \$100,000
ROLE | STRATEGIST, DESIGNER, PROFESSIONAL DEVELOPMENT BUDGET AND SCHEDULE MET
STAFF | MARGARET SULLIVAN, LYNA VUONG
CLIENT | ROBERTA PHILLIPS, CEO
REF | (301) 699-3500, ROBERTA.PHILLIPS@PGCMLS.INFO



serve the almost 1,000,000 residents living in one of the most racially, culturally, and socio-economically diverse counties in America. With this charge, Roberta galvanized her leadership team to assess, but also quickly mobilize their resources: over 300 staff members (unionized), 19 facilities, and over 100 partnerships. Seeing the opportunity to expand services based on County Executive Angela D. Alsobrook’s “Prince County Proud Priorities” to be just, prosperous, and a racially inclusive county, Roberta knew that a bold strategic vision, co-created with community and staff engagement, delivered with an implementable framework was a critical foundational step. This strategic work was intended to create a PGCMLS’s future state: to build the coalitions, deepen shared alignments of County leadership, provide staff with tools to be empowered to take immediate action, and energize board and leadership on their powerful contributing role.

A Participatory Process to Create Organizational Transformation
MSS kicked off the strategic work with a staff-day workshop in February, 2019. Designed to introduce the organization to human-centered, community-driven service design techniques, the day’s workshops focused on how to integrate the Growth Mindset into their daily operations. Staff worked on creating

shared organizational values, and learned how to create intentional experience principles based on the best practices of an inclusive learning organization. Staff and board participants were invigorated and challenged. One participant stated, “You are taking us off of a two-lane road and putting us on an eight-lane highway. It is going to take some time, but we are ready for it!”

Very quickly, thirty staff participants emerged who would create the Strategic Framework over the next year. The process MSS designed with the CEO’s executive leadership team, PGCMLS’ Board of Trustees, and consultant Ashana Crichton of ARC Growth Strategies, combined the process of the Salt Lake City Strategic Roadmap with market segmentation community research methodologies from the LVCCLD process, and introduced asset-based community development. Having created and implemented Library as Studio together from 2015-2019, in Roberta’s role at Richland (SC) Library, MSS and Roberta used the LAS operational framework to design a strategic process that integrated the holistic service model - people, places, partnerships, and platforms - at every strategic iteration.

A Clarity of Purpose: We Build Relationships
The strategic framework is structured around five focus areas: Inclusion, Literacy and Learning, Personal Achievement, Creativity, and Healthy Living. It is boldly positioning the library as an essential County-wide partner in the County’s community development agenda. Based on creating wonderful customer experiences and leveraging the skills and interests of the staff to provide services based on their (often hidden) talents, PGCMLS is building organizational capacities in alignment with community needs. With a strategy to transform the organization in three years with these strategic milestones: 2021: YEAR ONE: REALLY KNOW YOUR COMMUNITY; 2022: YEAR TWO: PRIORITIZING AND PROTOTYPING; 2023: REFINE AND EMBRACE , PGCMLS services will be will be driven by the community’s voices, will be making collective impact with strengthened strategic partnerships, will be convening County-wide coalitions, and will enjoy a professionally developed workforce skilled with human development, actively implementing curriculum designed to achieve strategic outcome goals.

Emerging as an Anti-Racist Library
With the Strategic Framework completed at the end of 2019, the Board was in the process of adoption when the Covid-19 pandemic occurred. Realizing this was an opportunity to



improve the strategy for unprecedented conditions, MSS and ARC continued to work with the board, staff, and leadership to articulate, commit, and to incorporate the community’s needs.

What resulted was a clarified mission to be one of the first Anti-Racist Libraries in the country. With a clear vision and mission, the strategic framework has enabled a deepening of what we called during the strategic process the “strategic why.” Having the strategy designed prior to Covid has accelerated PGCMLS’s organizational transformation. Most importantly, it laid the foundation for PGCMLS to confidently advocate for social justice and racial equity for all Prince Georgians, and model this confidence for peer libraries and institutions. One of the most successful virtual programs occurred in August, 2020, when PGCMLS hosted over 200,000 people worldwide to hear Dr. Ibram X. Kendi speak about his book “How to Be an Anti-Racist.”

Armed with a Strategy, an Appendix synthesizing the inputs, Toolkits and Worksheets for continuous learning with “feedback loop” methodologies, PGCMLS is already creating community impact based on social impact best practices. Within her first year as CEO, Roberta Phillips was awarded the County’s Women in Government Award at the County’s 36th Annual Women’s History Month Virtual Luncheon, in recognition of her leadership.

WORK APPROACH

Work Approach
Today, our society is at a critical inflection point. The choices and actions we take will determine our collective future. Given the challenging and complex conditions in which we find ourselves, we understand this work to be a strategic planning process to align San Francisco Public Library’s 21st century library services with community ambitions and institutional goals. The work that the San Francisco Public Library is embarking on will build on the enormous public trust SFPL enjoys. Recognizing the ambitious and impactful goals for this effort, we have assembled a uniquely qualified consultant team that will build on SFPL’s institutional strengths demonstrated in the 2017 Strategic Plan, as well as champion SFPL staff’s deep commitment to their communities during this pandemic.

This work, grounded in Justice, Equity, Diversity and Inclusion, (J.E.D.I.), will provide SFPL staff the guidance, the resources, and an activation strategy for their ideas to flourish, whether in buildings, virtual channels, or community outreach. Staff will also develop empathy to strengthen partnerships, deepen trusted relationships with community members, and become skilled at community co-creation. Our team’s J.E.D.I. processes embed training to deliver a readily implementable roadmap, unleashing staff and partners to do their best work daily, propelling SFPL into a future library built for the next generation of San Franciscans.

With evolution of services that sets SFPL apart nationally, including youth development programs, civic engagement innovations, the cool programs at the The Mix, the robust partners that contribute to the ever-creative Summer Stride, and special events such as Night of Ideas, SFPL is ready for this team’s highly participatory process that is based on just and equitable frameworks. SFPL leadership and staff will co-create a bold vision and strategic roadmap, informed by deep learning and listening about and with the diverse communities of San Francisco, and will be empowered with the tools to confidently know **“the why,” “the what,”** and **“the how-to.”** We will prioritize a just and equitable process as the means to achieve diverse and inclusive environments that support lifelong learning and a strong sense of belonging.

This strategic work will be conducted in six proposed phases. The final strategic document will be delivered June 1, 2022.

Phase I:	Pre-Work: Planning, Research and Analysis: Jul.-Aug., 2021
Phase II:	Information Gathering and Community Outreach Sep.-Oct., 2021
Phase III:	Identify Strategic Alignments Nov -Dec., 2021
Phase IV:	Envision Future Community and Employee Experiences Jan.-Feb., 2022
Phase V:	Create Strategic Roadmap & Toolkits Mar.- Apr., 2022
Phase VI:	Strategic Roadmap Feedback & Documentation, Delivered, June 1, 2022

We are strategy AND implementation. We envision, implement and train. Unique from other strategic and design firms, as trained organizational developers. architects, interior designers and service designers, we will always have the implementation as the final outcome that makes our process more meaningful and efficient.

We also have multiple tools available to recommend where the highest return on investment will result in the largest gains, whether it is through a technology, physical or staff solution.

Approach to Project Management
Strong project management is about communication, leveraging the talents of the team, and supporting every team member to ensure the process runs at the agreed upon pace. In strategic work, this requires sophisticated project management expertise. SFPL will benefit from the experience of the SmithGroup team, the wise leadership and cultural competence consulting of Billy and DTUI team , and the deep experience MSS has had at creating new methodologies that require real time re-direction.

Our approach to managing the SFPL strategic planning process is tailored around co-creating a collaborative environment which is fluid and iterative, organized around five primary activities that guide the character of the work of the six project phases. Each activity builds upon the previous one to create ideas and deepen an understanding of the core issues that will inform the SFPL Strategic Plan. Through this process, we generate a variety of integrated deliverables including data analytics, library facility analysis, planning strategies, prioritization diagrams and planning principles. This process keeps the project moving

forward within the defined schedule. Our methodology is simple, proven, and very effective.

1. LAUNCH - DIGEST The planning starts with launching a process of collaboration—getting to know each other and the details of each library: goals, aspirations, current challenges, and a visioning session for the future. This stage helps determine the strategic vision and principles that guide decision-making throughout the process.

2. DISCOVER - UNDERSTAND The analysis task seeks to understand all aspects of each library and their surrounding context. This includes the challenges of existing facilities and current users; the condition and capacity of infrastructure, accessibility; and constraints. Our team will use a “data-driven, community-led” approach, working closely with community and key stakeholders to analyze the major drivers and needs of the project and devise strategies that are embraced and actionable. We propose a strategy that develops a tailored engagement process during the initial discovery phase.

3. ITERATE - IDEA GENERATION Among the products of the iteration task are library framework diagrams, identifying high level ideas, areas of each library that are sacred spaces to be preserved, areas to be improved, opportunities as well as reimagining the future. During the idea generation task, this framework becomes the canvas to begin testing new ideas and concepts of how to organize the future strategic planning approach, accommodate new footprints, create new linkages, enliven the civic realm, consider resiliency approaches, and think about the library at different scales. Through a deliberative, interactive, and collaborative process of evaluation and weighted values, we can begin to select those strategies which merit further study and development.

4. REFINE - TEST A synthesis of the strongest concepts during a process of refinement creates multiple iterative drafts of the SFPL Strategic Plan for review. In this phase, the plan takes shape, adding specificity through key principles, narratives, diagrams, and metrics.

5. DOCUMENT - SHARE Upon approval of the strategic planning principles the documentation of the plan commences—preparing multiple report drafts for review and feedback. The planning process and recommendations are documented in a report that captures the full analysis generated with a bold strategic vision for the future.

Specifically, the beginning of the strategic process, especially with the intensive community engagement goals of this RFP, will require the most planning and coordination on the front end. Therefore, process benefits from weekly hour -long virtual meetings with SFPL’s strategic project management team, in addition to the Project Kick-Off meeting. These weekly touchpoints allow for planning, informal strategic conversations, clarifications, reflections, and re-directions in real time, and will continue until Phase III, when the frequency will be assessed. We will also issue Point-in-Time Deliverables after each phase and project milestone. And we can provide support for staff communication throughout the project.



Designing a Community Engagement Strategy
The Consultant Team will work with SFPL to create a meaningful community engagement strategy. With the deep community knowledge that LBE’s Two Rivers and Contigo will contribute, we will engage with additional community organizers and activists to galvanize the trusted networks that already exist in San Francisco’s neighborhoods.

We recognize this engagement will be one of the most critical aspects of the work effort, and the team will invest in the activist techniques that our team knows work, and yet are not regarded as conventional.

Every touchpoint with a San Franciscan is an opportunity to listen and learn. This can be in formal settings such as planning a series of focus groups, leveraging outreach with a local politician’s regularly scheduled gatherings, participating in food distribution events, conducting surveys on public transportation or at the local skate park. This could also be in informal settings, like an Uber ride, a breakfast at a hotel restaurant, or a conversation on the street. Our team will enjoy working

collaboratively with the experts in the community to deepen SFPL’s trust, and leverage opportunities to engage all we are able with rigor.

This rigor will also be filtered through the lens of equity and access. In doing this, we will identify that we will want to respect folks time through payment, gift cards, child-care and dinner. We will “meet them where they are” in unexpected ways and places. We will speak to them in their languages, meeting with community members once we know that the trust has been built with their trusted leaders.

Our team applies an Asset-Based Community Development approach that uses strengths, motivation, and small group conversations to create safe, comfortable environments to invite all to contribute. We use a variety of creative techniques to encourage participation guided by our curiosities and the inputs we will need at each phase. We educate, inspire, build coalitions, and generate consensus. Our tools build trust and empathy while enabling participants to not only tell us about

their hopes and dreams, but also what they want for their fellow community members: their friends, their neighbors, and their children. We introduce tools, such as the Place It! Technique designed by James Rojas, a San Francisco Bay Area urban planner, masterfully engaging communities of color in the design process by using familiar household objects to design their first memories of public space.

Our team will integrate a variety of engagement and planning tools including user surveys (which we can help you author using Survey Gizmo), idea submission, feedback loops, and user voting, and using the interactive “town hall” techniques, we will encourage participation, inclusiveness, and transparency in the process. In addition, our team can assist SFPL in the design, launch, and maintenance of a website to distribute strategic planning information and serve as a repository for graphics, presentations, and reports.

Yet, as is known by any public servant, especially public library work, human beings are complex, and everyone enters

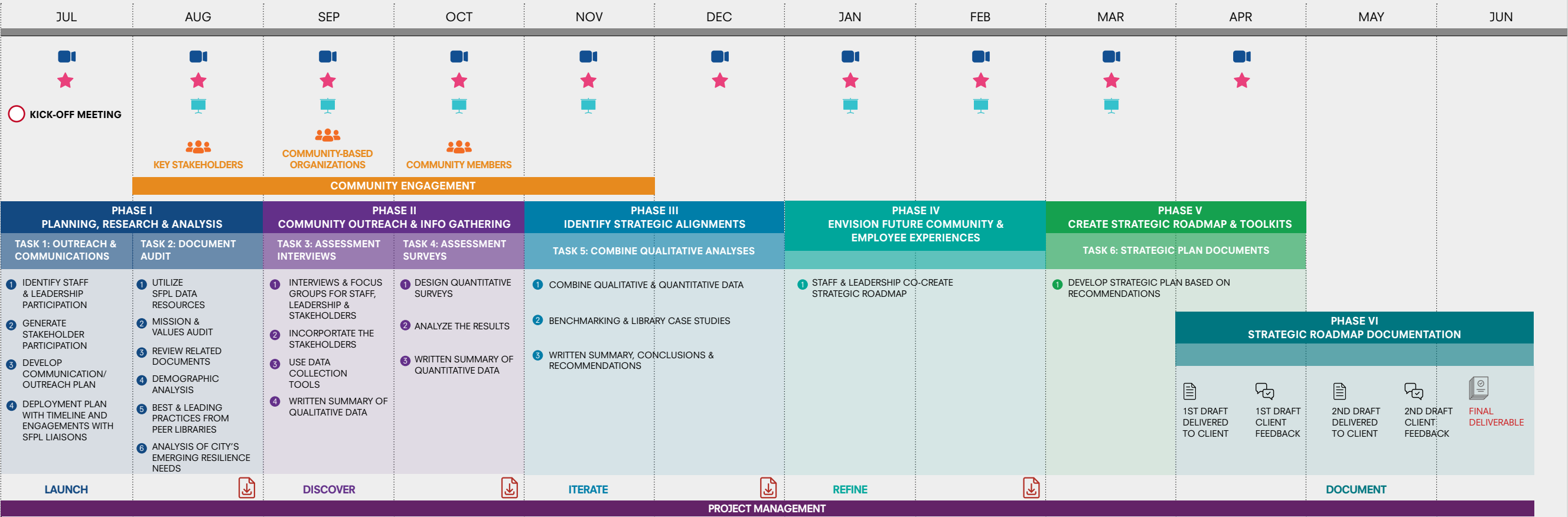
their public engagement with diverse lived experiences that inform attitudes and motivations. With a team that teaches organizations conflict resolution techniques such as acknowledgement, graciousness, and deep listening to de-escalate tensions, we are confident that we will create the conditions for all participants to feel valued. Tensions aren’t always negative. The team has applied techniques that use the tensions to deepen community conversations and facilitate folks to “work through” complex issues that can arise.

Our community’ engagement work with SFPL will not only be successful, but also joyful, vibrant, thought-provoking, and playful. Our work designs positive experiences, and with intentional design, we demonstrate the benefit of engaging in the best practices for inclusion. This is the foundation to SFPL’s leveraging community trust and serving as an anecdotal and data-driven community knowledge center for all of San Francisco’s public institutions. We know this community engagement work will build in the foundational systems for SFPL’s increased value proposition. We create the conditions

for communities to flourish, whether with communities to envision the future library, or in the building design that vision informed. SFPL is a gift to all residents of San Francisco. Our team will honor that.



WORK PLAN & PROJECT SCHEDULE



LEGEND

- WEEKLY VIDEO MEETING
- LEADERSHIP MEETING
- STAFF ENGAGEMENT WORKSHOP
- COMMUNITY ENGAGEMENT
- PROJECT MANAGAEMENT
- POINT-IN-TIME DELIVERABLE

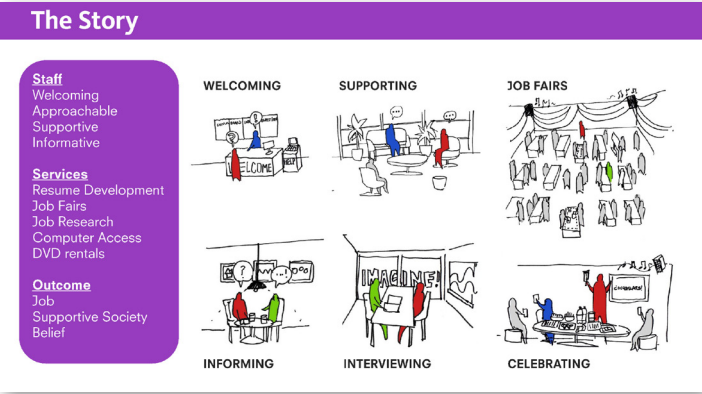
FINAL REPORT INCLUDES

- 1. Strategic Planning Document
- 2. Appendix
- 3. SFPL Toolkits
- 4. SFPL Field Guide



Approach to Community Engagement

Our team brings a dynamic set of tools, and a team of individuals with strengths to facilitate participatory, energetic, empathetic, and meaningful community engagement, executed with justice-centered inclusive practices. Our strengths are unmatched by any others in the library industry.



The process will also leverage community assets, including community leaders and community-based organizations alignments to result in a collaborative community impact model that strengthens the role of the library, facilities, and partnerships.

Successful engagement will connect with the broad diversity of users, nearby businesses, neighbors, and residents and to find means to allow their contributions to hold equal weight in discourse. Engagement is about listening and understanding. Great engagement leaves people feeling heard and acknowledged, confirms for people that their opinion is important, and that their participation will help shape the outcome. If constituents come away feeling respected, understood and committed to the success of the project, then the resultant effort will be not only better for it but will create an opportunity for everyone to share in the success when we reach the finish line with you. We strive for a transparent public discourse that:

- Engages a Robust Dialogue
- Promotes Diversity and Inclusion
- Establishes a Transparent Process
- Builds Trust
- Flows Seamlessly from In-person to Online Tools
- Is Data-Driven and Human-Centric
- Targets Outreach to a Multiplicity of Constituents
- Continues the Conversation Beyond the Project

We are out-of-the box designers, employing experience and “take action” techniques to build on these for outreach best practices. We will:

- Build from previous processes
- Utilize current SFPL structures spanning mobile, online, print and in-person methods
- Work with the SFPL to consider multilingual approaches
- Amplify existing social media outlets (City & SFPL Communications Departments, Library, Parks and Recreation, etc)
- Engage with existing City boards and commissions
- Attend events and organizations
- Utilize Online resources (e.g. Nextdoor, Meetup, HiveBrite)
- Engage SFPL’s community ecosystem: school districts, non-profits, business community

All of the community engagement conversations will begin with a warm, gracious welcome, relay the purpose of the gathering, and facilitate conversations about the strengths of the community. Then the fun, the learning, and the “a-ha” moments start! We will get folks excited - in an “imagine the possibilities” spirit - how community-driven 21st century libraries can serve ALL in the San Francisco community for years in the future! This setup is then customized in format and activity for each engagement type.

We will design customized formats for each engagement touchpoint, building on the team’s vast experience. We will also design new engagement itineraries based on community conditions, our passion for justice, and our creativity! The following outlines scenarios based on experience.



For **one-on-one key stakeholder conversations**, we apply a systemized approach, framed around the same questions, as designed with SFPL’s leadership team, to both encourage candor, and to lift common themes. This will generate a data-driven input set to reveal key **community alignments**.

With **focus groups**, we apply best practices for communities to share their ideas and reflections through small group conversations and ideation, thought-starter worksheets, organizational brief exercises, and “gallery walks,” where participants can see each other’s work pinned up in the room. This encourages community learning, fostering deeper dialogue, to result in shared **challenges, aspirations** and **future library roles**.

We will also encourage gathering **community-based organizations** and **library partners** to participate in **focus group conversations** and **workshops** to articulate shared outcome goals and alignments, while also communicating strengths and gaps. As evident in all of our strategic work with libraries, these conversations will reveal clearly SFPL’s contributing role, leveraging SFPL’s already trusted position as a powerful convener, connector, and respected coalition builder.

We design surveys in multiple languages, and are able to deploy them on-line and in-person. Our questions garner valuable insight into community member’s values, priorities, and challenges. We ask questions about their hobbies, how they spend their free time, and what they love about their communities. These questions can build on the behavior patterns of SFPL’s current insight. We can also coordinate this work with SFPL’s research team to build and optimize their work.

One of the most insightful tools we deploy is a **“Location Questionnaire.”** Staff members will complete these during Phase I. This set of nine questions, completed by Main and all neighborhood library location team members, reveals the deep knowledge that staff have about their communities, the user characteristics, existing and future partnerships, and their vision for their community members. This is one of the most important tools the team will use to understand and validate **unique community characteristics** and engage staff meaningfully at the beginning of the process.

Finally, we will teach SFPL staff (see organizational strategy below) a set of service design techniques to garner input

from their unmatched community knowledge, their trusted relationships, and their continuous opportunities of discovery during this entire process, These techniques include **Directed Storytelling, Customer Intercepts, Customer Journey Mapping, AEIOU Observation techniques, Case Studies, Service Safaris**, and potential tools designed with SFPL. For the strategic work, these tools will engage staff in “deep learning” about community members to complement survey inputs in Phases II and III. They will be the foundation for future service generation in Phases IV and V.

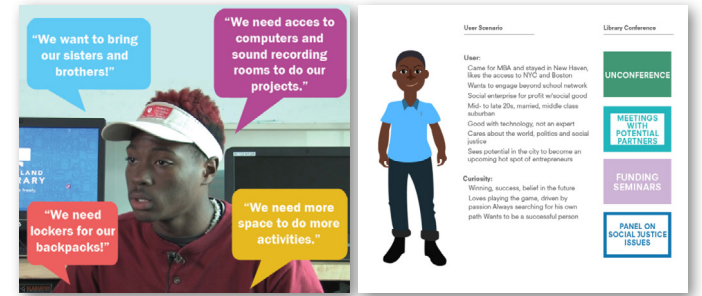
More importantly, when these skills and tools are embedded in the entire organization, SFPL staff will become an army of empathetic **community engagement experts**, with the super-hero powers to know, REALLY know the community’s hopes, dreams. and aspirations in real time.

Designing an Organizational Strategy

The consultant team will work with SFPL to create a successful SFPL internal organizational strategy. Ready implementation and sustained culture growth will result from service design techniques this team will introduce to SFPL. Typically, we work with 30-40 “early adopters” and library leaders to workshop the process.

To note, we also like to engage the entire staff in incredibly insightful values and community surveys at the beginning of the work, staff focus group conversations, all-staff engagement workshops, in addition to employing communication strategies with SFPL leadership throughout the process for meaningful engagement.

We propose six highly participatory staff and leadership workshops to co-create strategy, applying human-centered service design techniques. Cultural competencies will be deepened through compassion-building with exercises such as **Directed Storytelling:** customer interviews that deepen the staff’s knowledge of how SFPL supports the current



needs of its customers. This foundational work will support equity initiatives and will be key to staff taking the “current state” to an inspired “future state” informed by evidence and imagined by possibilities. With a time frame very similar to the work Salt Lake City Public Library Strategic Roadmap, Las Vegas - Clark County Library District’s Vision 2020, and Prince George’s Memorial Library System’s successful “Anti-Racist Library” strategic roadmap, we can use those engagement workshop “modules” as case studies, incorporate the plethora of experience this team brings, and customize a workshop strategy for SFPL. After the strategy is adopted, Early Adopters will model this work for the entire organization to implement. Our team will be able to continue the professional development through the iterative process, applying the exact methodology staff and leadership learned and applied.

Document Audit
SFPL has undergone changes over the past five years as has the city it serves. Much of those changes have been captured in documentation. Our team will collect all existing relevant SFPL documents. We will conduct a systematic analysis of the documents using our tools, such as the team’s archival analysis checklist tools and qualitative analysis technique. The analysis will uncover themes that capture the current alignment of policies, procedures, and communications with the library’s mission and vision, as well as implications for meeting stated racial equity goals.

Examples of documentation include relevant policies, procedures, strategic plans, brochures, videos, flyers, research reports, demographic data, outreach communications, hazard resilience and climate action plans, and other documents deemed important to the project. This analysis will illustrate a baseline “current state” to serve as a marker for the “future state” visioning.

Readings & Research (added task)
Strategic work is a privilege enabling us to deepen our knowledge, and broaden our learning for what SFPL will be for future generations. In addition to the tasks outlined in the RFP, we will encourage all team members to engage in readings of seminal industry papers, as well as engage in study about community economic development work, collective impact work, the United Nations vast body of work on human development, equitable practices, Sustainability Goals, and their recent Happiness Report assessments. All of the

consultant team members are well-versed in some of the most important recent research that can benefit this work, including social infrastructure (see SmithGroup’s “[Reimagining the Public Realm](#)” report), 15-minute cities, and the science of happiness. SmithGroup and MSS have also both been investigating Enriched Environments, the science that proves that beautiful, natural, and active environments stimulate the brain to stimulate a sense of social safety and increased learning. These are the same principles that were applied to developing the Public Library Association’s Every Child Ready to Read principles, and can be powerful knowledge to deepen SFPL’s Value Proposition.

The team is also deepening our research and knowledge around the role public libraries will play as community engagement development engines, applying social impact metrics proven more effective at building social capital than conventional public library metrics. These practices are also already embedded in Connected Learning principles that center the teens, build their healthy eco-systems, and leverage partnerships. This is happening in The Mix daily, with poetry slams with Valencia 826, for example. With ten years of learnings, we can take the “Learning Lab” work to scale, applying practices to all ages and stages of growth.

Finally, the Federal Reserve Bank of San Francisco issued a monumental Call-to-Action two years ago that proves the impact of Creative Placemaking to foster community wealth and health, titled, “[Creative Placemaking in Government: Past and Future](#)”

Our team embeds these practices of Placemaking in our inclusive design methodology, and looks forward to amplifying SFPL’s impact with the strategies outlined in this seminal body of evidence.

Bold Visioning & Future Forces (added task)
The most successful strategic work is when the team engages in visioning both individually and collectively at the beginning of the work. Our team brings a plethora of interactive worksheets and workshoping techniques to challenge ourselves to begin this work with the boldest, biggest, and grandest visions that will energize and encourage everyone to be their most creative, innovative contributors throughout the process. This also provides the team time to understand the future social, technological, economic, environmental, and political forces

that will disrupt the industry through future scenario-creating, applying research such as ALA’s Future of Libraries to benefit this process. Scenarios are a great tool during strategic work. They are one of the best, and most fun, tools to prepare our institutions for uncertain futures.

Qualitative and Quantitative Analyses
Quantitative data will be analyzed in two ways. The survey data will be analyzed and described with descriptive statistics. Document audit and interview data will be categorized into themes and described according to communications, equity and inclusion barriers.

Qualitative Analyses
Collectively, our team is expert at synthesizing complex data to reveal themes that are the clear inputs that drive the vision. We also can engage the Staff Working group in “sensemaking” workshops to learn how to synthesize complex data through their own patterning and theming exercises. We love sticky notes!

This work starts with organizing the data in a meaningful and systematic way and can be strengthened with strategic frameworks that organize the information into strategic goals, including social frameworks (affordable housing, food justice, child-care, transportation, etc...) experiential frameworks (educational, social, workforce, cultural, etc...) and operational frameworks (collections, technologies, partnerships, and staff skills and talents).

The goals of the workshops are to identify what conveyed information is relevant to the strategic planning goals. Our team has access to powerful software that can support the work.

Resulting in clear themes of need, alignments, opportunities, and pattern of communities, human behaviors, and individual’s common aspirations, these data sets will inform the fun part of this work: Envisioning the Future! Armed with evidence, educated with possibilities, the strategic framework and re-imagined SFPL service model for a bold vision will emerge in Phase III, and the services will be designed to “test” and operationalize this vision in Phase IV.

Benchmarking Studies
Our team will deliver not only “benchmarks,” but case studies of public libraries that have embraced bold vision. This enables

a more substantive critical inquiry approach by understanding peer organizations community’s conditions, the organization’s “current state” when the strategic work began, and the time and processes it took (is taking) to achieve the strategic vision. This case study approach has been successful, especially with Library Boards, such as Grand Rapids Public Library and Prince George’s County Memorial Library System, to identify relevant and realistic short term and long term measurements for libraries embracing a social impact model of community transformation. We will also encourage staff members to engage in **Case Studies** to do their own research on peer institutions.

Envisioning Future Customer and Employee Experiences (added task)
Incorporating inputs, research, and discoveries, the consultant team will engage staff and leadership with two final workshops to explore experiential and operational approaches to achieve strategic priorities. With the final workshop, the staff will formalize the library’s service design process and implementation methods related to the strategic initiatives. The results will be a roadmap with the vision of the future as defined by the Strategic Planning Team. Tools applied will be Customer Service Journeys, Visual Ideation: Key Moments and Storyboarding, Service Storming (Improv), Service Origami, and Service Blueprinting.

Presentations
Our team will look forward to presenting this bold vision in support of its successful implementation to boards, staff, community members, City leaders, and community partners.

