**Working Agenda for Library Development Division Retreat**

**June 11, 2018 – June 13, 2018**

**Helena, MT**

**Homework:**

* Fun personality test – Hogwarts’ Sorting from Harry Potter series.
  + You can be sorted at Pottermore (requires joining) - <https://www.pottermore.com/>
  + Time.com (does not require creating an account) - http://time.com/4809884/harry-potter-house-sorting-hat-quiz/
* Create a unique job title that describes in a meaningful way what you do – your talents and contributions to the organization. It can be whimsical or practical. Examples: Duchess of Data or Minister of Dollars and Sense.
* Read OCLC’s 2018 From Awareness to Funding Summary Report.
  + Specifically, read pages 8 – 11 and pages 26 – 29
* Review 5-year LSTA plan – which goals and outcomes do you think we should work on next year (October 1 – September 30)
  + Brainstorm ideas (related to implementation of the LSTA plan) for next year’s work plan. Review what the NAC set for us last year. Do you want to continue? Add? Or subtract anything?
  + We have 56K – what could we realistically do that would be fun and innovative and would help us achieve our goals in the 5year plan? Brainstorm ideas.
* Brainstorm duties, tasks, or projects we could let go of – what could we stop doing?

**June 11, 2018 – located at Montana Wild (2668 Broadwater Avenue)**

1:30pm – 4:30pm Team Building and Teamwork – getting to know each other and improving as a team

* Beach ball exercise
* Sorting exercise – as people come in; have them add their names to sheet.
* Introduction to our various positions in Library Development
  + What is your self-appointed job title?
  + What do you do at MSL? How you would like your program/work to be described?
* Future of libraries and MSL – review of the OCLC 2018 – From Awareness to Funding
  + Initial thoughts – what jumped out at you? What do we need to discuss first?
  + What does it mean for libraries that support and value for so many areas has declined since 2008?
  + What do library “customers” want? What do libraries do that is unique?
  + What are the intractable problems that we need to solve? What are we missing? What’s next?
  + What does it mean to value risk taking? What would that look like for us?
  + What needs to change within Library Development?

5:00ish Dinner and Board Games at Tracy’s – 2805 Alexis Ave. Spouses, children, significant and insignificant others are welcome.

**June 12, 2018**

8:30am – 4:00pm Work from June 11/Data Driven Model Refresher

* Future of libraries/work from yesterday
* Data Driven Model – what is it? Brief history of our experiences with it.
* 3 Major phases of the data driven model
  + Start with the end in mind – what outcomes do you want to achieve? What impacts will occur? How will you know you have been successful?
  + Collect and analyze the data
  + Use analysis of data to make decisions
* Creating Public Value - Foundation
  + Strategic Triangle
* Logic model – identifying stakeholder needs/values, impacts, and what we need and will deliver
* Stakeholder analysis of training about collaboration – being a good partner
  + Who are our customers for this workshop? What do they want? Need?
  + Who are the policy makers? What do they want? Need?
  + Who are our funders? What do they want? Need?
* Creating outcome/impact statements
  + Use whatever method works for you – plug it into the logic model; teaching model per Jennifer; the theory of change; or a modified Kirkpatrick model
* Kirkpatrick model exercise
  + What results do we want to see? (the impact)
  + What behavior leads to those results? (mid to long-term outcomes)
  + What learning leads to that behavior? (short-term outcomes)
  + What activities lead to that learning? (outputs)
* Theory of Change Exercise
* Create a logic model
* Gut check – does it have the three points of the triangle (or pretty, much have them?)
  + How will we know we have been successful? What data do we need to collect?
* Data collection and analysis – building a process or can we now do stage 2 of the data driven model
  + What data have I used and how? Examples from Tracy
  + Implementing stages 2 and 3
    - Generally, what would you like to know about your services, library development, or MSL or even libraries?
    - What data do we currently collect? How do you use it? How could we use it? Are there any gaps? Use sticky wall or sticky notes.
* Evaluation of data – final stage – using what we learned.
* Next steps
  + What ideas do you have for implementing the next stage of the data driven model?
* Conclusion – tomorrow’s meeting

5:00ish Dinner – Location TBD

**June 13, 2018**

8:30am – noon LDD Work Plan; Ideas for reducing the workload

**Deliverables:**

* Recommendation to the NAC and Tracy on what LDD should work on in the coming year – which goals, which outcomes, and ideas – include objectives and projects
* Recommendations for how to spend the $50K – need to be able to understand the proposal and know who to ask for more details.
* Recommendations to Tracy on projects, tasks, or duties that we might be able to stop doing

**Questions for teambuilding piece:**

How do you most like to spend your time? What’s the most important lesson or insight you’ve gotten from your work? What do you wish you had known at the start of your career? How do you think work should be restructured to make it more productive and enjoyable? How do you think you can be most helpful to teammates?