

# PLANNING WITH PURPOSE

PRACTICAL LESSONS FROM A  
STRATEGIC PLANNING JOURNEY





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 Jeff is currently reading *Wizard and Glass* (The Dark Tower IV) by Stephen King.

## Introduction: From Vision to Action

Strategic planning is often seen as a necessary but daunting task. It is sometimes perceived as abstract, time-consuming, or disconnected from day-to-day operations. At Davenport Public Library (DPL), we approached our FY2026–2028 planning process with a different mindset: We wanted a plan that was not only visionary but also practical, inclusive, and rooted in the needs of our community.

This article shares the most impactful lessons we learned along the way—what worked, what didn't, and what other libraries can adapt to their own contexts. Whether you are a small rural library or a large urban system, we hope our experience offers useful insights for building a strategic plan that creates meaningful, lasting change.

## About Davenport Public Library

For some context, Davenport, Iowa, is the largest city within the Quad Cities metropolitan area, which comprises several communities in eastern Iowa and western Illinois along the Mississippi River. The Quad Cities region has a population of about half a million residents and serves as a regional hub between Chicago and Des Moines, as well as Minneapolis and St. Louis.

DPL has a longstanding tradition of serving Davenport and the surrounding communities. As a multibranch system with comprehensive outreach services, we strive to connect a diverse community to resources that educate, enrich, and entertain.

## Why Strategic Planning?

Strategic planning is essential for public libraries of all sizes, because it ensures that services remain aligned with the evolving needs of the communities they serve. For DPL, the process has been critical for guiding decision-making, prioritizing initiatives, and fostering a culture of continuous improvement.

By engaging stakeholders and community members, DPL has established clear, measurable goals that reflect both local aspirations and broader trends in library services. This intentional approach, combined with other initiatives, such as an annual director's work plan, enhances accountability and transparency. Support

from our board of trustees has further positioned our organization as proactive and committed to meeting community needs.

### Lesson 1: Start with a Clear Purpose and the Right Partners

Before launching into planning, we asked ourselves: What do we want this plan to accomplish? Our answer was simple but powerful. We wanted a plan that would guide our services, reflect our community's aspirations, and be flexible enough to adapt over time. We also wanted to create a plan that enabled employees from all departments to see their role and contributions reflected within it.

To support this vision, we secured funding from the FRIENDS of the Davenport Public Library and hired Bâton Global, a consulting firm with experience in public sector strategy. Bâton enhanced the planning process through data gathering, translating the data into action, and employing professional facilitation practices. Not every library needs a consultant, but having a neutral facilitator, whether internal or external, can help keep the process focused and inclusive, and help with the “lift.” This was a critical component for our success, because we wanted an unbiased third party to ensure that communication between our frontline teams and leadership was unconstrained and honest.

#### Practical Tip:

If hiring a consultant is not feasible, explore other resources, such as your state library. For example, the State Library of Iowa offers planning support to libraries through district consultants and also includes strategic planning in state accreditation standards.

### Lesson 2: Use Multichannel Outreach to Maximize Engagement

We knew that community input would be the foundation of our plan, so we designed a robust outreach strategy that included:

- One-on-one interviews with library leaders and partners

- Multiple focus groups with families, adults, and staff
- Partner surveys distributed through local organizations
- A community-wide survey available online and in person, including paper and Spanish versions

Our outreach team played a critical role in reaching underrepresented groups by distributing surveys to schools, events, and other locations in the community. We also saw a major spike in responses from our email outreach to registered cardholders, which was proof that direct, trusted communication channels work. Ultimately, more than 2,000 people participated in our surveys, and nearly 100 partners and key stakeholders contributed their feedback. The response exceeded our expectations and those of our consultants.

#### Practical Tip:

Don't rely on a single method. Use a mix of digital and in-person outreach, and leverage your existing networks, such as cardholder emails or partner organizations, to boost participation. Depending on your community, it may be beneficial to offer surveys in multiple languages. Seek out where people are to ensure your responses are an accurate representation of your entire community.

### Lesson 3: Make Staff Engagement a Cornerstone

One of the key strengths of our process was the high level of staff engagement. We recognize that our staff are our most valuable asset—a diverse team of dedicated and compassionate professionals. To foster inclusive participation, we invited employees to take part in surveys, focus groups, and planning workshops. We ensured representation from various departments and organizational levels within the planning team. Peer-selected representatives engaged in discussions, conveyed staff ideas and concerns, and provided regular updates to their colleagues throughout the process. This participatory approach empowered staff to have a meaningful voice in shaping the future of the library and

yielded valuable insights into internal operations, service delivery, and community needs that might not have been identified by leadership alone.

#### Practical Tip:

Create multiple, low-barrier opportunities for staff to contribute. Use anonymous surveys, open forums, and department-level discussions to gather input. Then, close the loop by showing how feedback influenced the final plan. Finally, during implementation, offer staff numerous opportunities to collaborate on cross-departmental teams to ensure successful outcomes.

### Lesson 4: Let Data Drive the Conversation

As an organization, we employ a combination of quantitative data and qualitative insights to guide our decision-making processes. This approach is particularly important in our strategic planning activities as Bâton Global developed an insights report that encompassed:

- Community and partner survey results
- Focus group themes
- One-on-one interview insights
- Peer library benchmarking
- Demographic and city survey data

This 107-page report helped us identify service gaps, community priorities, and opportunities for innovation. For example, benchmarking against eighteen peer libraries across Iowa, the Midwest, and the United States identified opportunities to enhance service offerings and improve accessibility. This compiled information allowed us to review our core “North Star” principles, including our mission, vision, values, and organizational philosophies. It also helped us in terms of thinking strategically by “looking beyond the present situation and thinking critically and creatively about the many potential futures.”<sup>1</sup>

#### Practical Tip:

Use data to validate assumptions and guide decisions. Even traditional tools like US Census data or peer comparisons can provide powerful insights. And never underestimate the power of Microsoft Excel!

### Lesson 5: Build a Diverse, Empowered Planning Team

We formed a twelve-member strategic planning team that included trustees, executive leadership, management, frontline staff selected by their peers, library support organization representation, and city leadership. Each member was designated as a liaison to their respective groups, responsible for gathering feedback and actively participating in workshops and discussions. We also provided the insights report in advance of the sessions, secured a venue conducive to open dialogue, and provided food and drink to help participants be at their best.

In hindsight, we recognized that our team was too top-heavy with administrative voices. Although leadership perspectives are vital, broader representation from the city and community would have significantly enriched our planning process. The planning team would have also benefited from having more time to discuss strategic directions; however, financial considerations limited our options.

#### Practical Tip:

Be intentional in selecting team members. Strive for inclusivity across all organizational levels, and involve community partners and city stakeholders from the outset. Provide food and frequent breaks, and be sure to communicate expectations to keep everyone engaged early and often. While providing staff with a seat at the table is valuable, it is equally important to create opportunities for their voices to be heard and valued at the same level as others.

Ensure the key library leaders, who will ultimately be responsible for the plan’s implementation, are part of the planning team or are frequently consulted so they are knowledgeable on how plan goals were selected and they are positioned to take goal ownership for the years ahead.

Keep the planning team to a manageable size to optimize having the right mix of voices and an efficient drafting process. Twelve or fewer participants have proven ideal based on our consultant’s experience. Department and cross-functional teams can provide inputs to their corresponding areas of the plan via a planning team member.

## Lesson 6: Align with Community and City Priorities

Although our final plan is library specific, we made a conscious effort to align with broader community and city goals. We reviewed the City of Davenport’s strategic priorities and incorporated relevant themes into our own plan. We also looked at strategic plans for other organizations in the community, such as Downtown Davenport Partnership, Scott County, Visit Quad Cities, and Davenport Community School District. This alignment allowed us to not only strengthen our partnerships but also to position the library as a key player in citywide and regional initiatives.

### Practical Tip:

Review your city’s or county’s strategic plan and look for areas of overlap. Invite city leaders to participate in your planning process and explore opportunities for joint initiatives to build synergy.

## Lesson 7: Structure Your Plan for Action

We organized our strategic plan using a cascading structure:

1. **Strategic directions**—broad aspirational themes, also known as “pillars”
2. **Goals**—desired outcomes under each direction
3. **Objectives**—defined action plans using SMART (specific, measurable, achievable, relevant, time-bound) criteria

This structure helped us move from vision to execution, or “decisions and activities you undertake in order to turn your strategy and its implementation into commercial success.”<sup>22</sup>

We developed:

- Six strategic directions
- Sixteen goals
- Forty-nine objectives

The strategic directions are focused on enhancing community awareness of the library,

promoting lifelong learning, curating dynamic collections, ensuring our libraries are accessible and engaging, and working to maintain operational excellence and a quality work culture. The goals further define these aspirational strategies and are further distilled to many achievable objectives. Each of the nearly fifty objectives include key performance indicators (KPIs), timelines, and resource needs. This level of detail ensures that the objectives are not just aspirational but actionable. Finally, we ensured that every department in the organization is represented in the plan and each objective has a lead.

### Practical Tip:

Use the SMART framework to turn big ideas into manageable steps. Assign ownership and track progress regularly to keep momentum. Follow up monthly, quarterly, or whatever time frame makes sense for your organization. Focusing on six strategic pillars may feel overwhelming; consider concentrating on one or two priorities to enhance focus and effectiveness.

## Lesson 8: Use Project Management Principles

To manage the complexity of implementing forty-nine objectives across multiple departments, we apply basic project management principles. As mentioned, each objective has:

- A designated lead
- A timeline
- Identified resources (staff, budget, partners)
- Measurements for success, or KPIs for tracking progress

We also use shared tools to monitor timelines, dependencies, and outcomes. This structured approach helps us stay organized and accountable, and provides opportunities to keep our board of trustees updated on an ongoing basis.

**Practical Tip:**

You don't need expensive software to manage your plan. A shared spreadsheet or project board can go a long way in keeping teams aligned and on track. We extensively utilize Microsoft Excel, leveraging features like the "Table" function to enable easy sorting and filtering based on criteria such as upcoming deadlines or task status (pending vs. completed).

**Lesson 9: Measure What Matters**

One of the most important lessons we learned is that success must be measurable. That is why we developed clear measures of success for each objective and committed to tracking them over time.

We utilized a Community Net Promoter Score (NPS) to assess public perception and satisfaction. This straightforward metric, derived from the question "How likely are you to recommend Davenport Public Library to a friend or colleague?" provides insight into community sentiment and highlights potential areas for improvement. Our stakeholders (staff, partners, government/community leaders, trustees, and Friends) confirmed high esteem for the library with an NPS of 83; our partners rated us 96. These data reaffirmed our assumptions, as the City of Davenport conducts a community survey every two years. DPL typically rates in the top two highest rated city services (94%), and all library assessed areas received ratings above 75%, indicating high resident satisfaction with library services. At the same time, the mean NPS of 65 for non-library users, while still above industry average, indicates an opportunity to better understand and address community needs.

**Practical Tip:**

Like most public libraries, we want to support every child's preparedness for school and foster a love of reading before first grade. However, we understand that this may not be attainable for all children. Therefore, we selected a few more meaningful metrics and tracked them consistently. One of our favorites is evaluating the effectiveness of library programming, particularly in regard to outcomes and changed behavior as a result of participating in a program. Don't get bogged down in data overload. Focus on what truly reflects impact and progress.

**Lesson 10: Build in Flexibility and Continuous Evaluation**

From the outset, we recognized the importance of maintaining a flexible approach to our plan. Community needs are continually evolving, funding sources can fluctuate, and new opportunities regularly emerge. Over recent years, our team has encountered several challenges, including funding reductions following the loss of an academic partnership, a partial building collapse near our Main Library that impacted both our community and our operations, and the elimination of Iowa's Special Library Levy by the state legislature in 2023. To address these dynamics, we incorporated mechanisms for ongoing evaluation and adjustment.

Each objective has an assigned leader and incorporates a structured review process. We are committed to regularly assessing our progress internally and conducting formal reviews with our board of trustees. This approach helps ensure that the plan remains aligned with our priorities and allows us to make timely modifications as circumstances change. We are not afraid to eliminate or add objectives in response to changing circumstances.

**Practical Tip:**

Approach your strategic plan as a living document. Schedule regular check-ins, acknowledge achievements, and remain open to revising goals, objectives, and even strategy in response to changing situations.

**Bonus Lesson: Celebrate and Communicate**

Strategic planning can be intense, but it should also be energizing. We make it a point to celebrate milestones, recognize contributors, and communicate progress regularly. This helps maintain enthusiasm and reinforces the message that the plan belongs to everyone. We seek out opportunities to ensure staff members can see themselves in the plan, thereby gaining buy-in and increasing the likelihood for success. At the time of this writing, we are exploring

the use of SharePoint to create an internal dashboard to provide a single point of entry for anyone seeking more information about the plan and status of projects. Finally, we created a simplified, public-facing version of the plan that's easy to understand and visually engaging. This transparency is designed to build trust and invite ongoing community involvement.

**Practical Tip:**

Never wait until the end to communicate. Share updates throughout the implementation process, highlight community contributions, and make the final plan accessible to all.

## Conclusion: A Blueprint for Impact

Strategic planning does not have to be overwhelming. It can be a constructive and manageable process when approached with the right mindset, tools, and team collaboration. At DPL, we have found that success is rooted in active listening, collaborative development, and maintaining flexibility throughout the process.

Our strategic plan serves as a guiding framework for meaningful impact. It incorporates the insights of our community, the commitment of our staff, and our shared conviction that public libraries are vital

to fostering community-wide cultures of learning where everyone is empowered. Whether you are initiating your planning efforts or refining an existing strategy, we hope our experience provides practical insights and inspiration. [P](#)

## References

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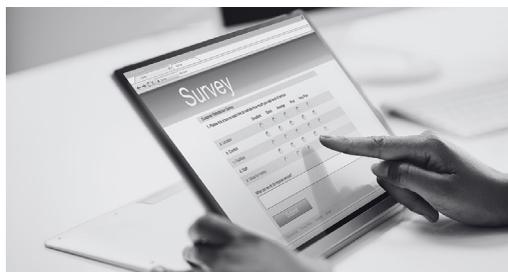
## FURTHER READING

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