

2022 Turning Outward Cohort

July Meet-Up | Organizing Your Notes & Theming



2022 Timeline

March

July

November



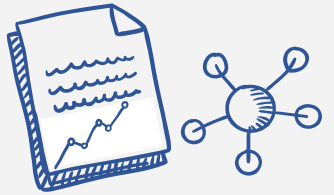
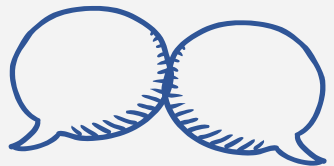
Training

Planning

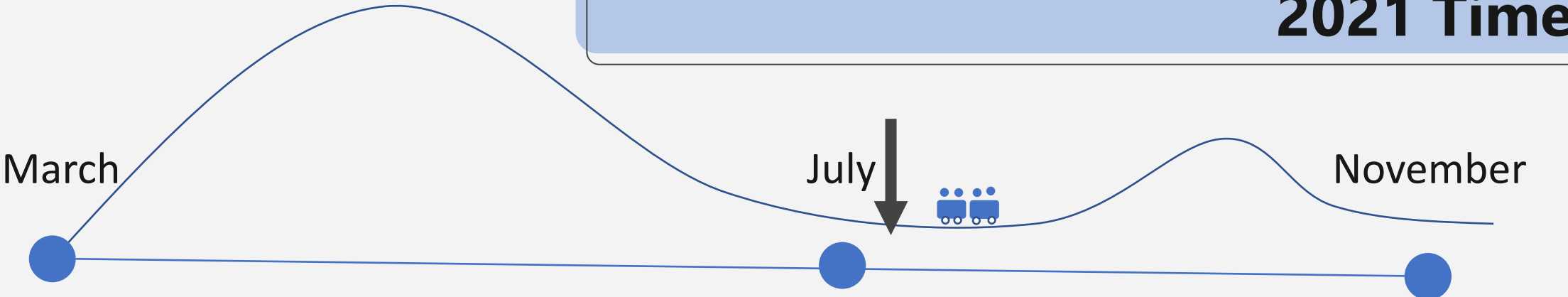
Conversations

Analysis

Plan & Share



2021 Timeline



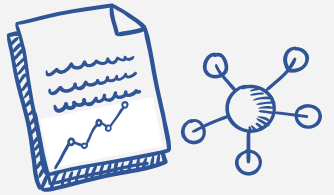
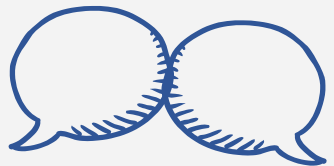
Training

Planning

Conversations

Analysis

Plan & Share



Organizing Your Notes

ORGANIZING YOUR NOTES

Review and combine your notes from the different conversations. Organize them into six categories. It's okay if these are fairly long or overlap. You want to keep things broad so you can see patterns. You'll be narrowing and clarifying as you go. Have notes in a form that will be easy for people to access and use (e.g. electronic file they can print and bring with them).

Aspirations (for the community, their children):

Main concerns (top-of-mind concerns about the larger community):

Specific issue concerns (those concerns related to the issue you're exploring):

Actions that would make a difference:

Whom do people trust to act:

Questions people have:

Develop Themes

ORGANIZING YOUR NOTES

Review and combine your notes from the different categories. It's okay if these are fairly long or overlap. You can see patterns. You'll be narrowing and clarifying as you go. Make it as easy for people to access and use (e.g. electronic file the

Aspirations (for the community, their children):

Main concerns (top-of-mind concerns about the larger community):

Specific issue concerns (those concerns related to the issue at hand):

Actions that would make a difference:

Whom do people trust to act:

Questions people have:

What patterns do you see?

How can concepts and ideas fit together to make a theme?

Develop Themes

ORGANIZING YOUR NOTES

Review and combine your notes from the different conversations into categories. It's okay if these are fairly long or overlap. You can see patterns. You'll be narrowing and clarifying as you go. Make it easy for people to access and use (e.g. electronic file the

Aspirations (for the community, their children):

Main concerns (top-of-mind concerns about the larger community):

Specific issue concerns (those concerns related to the issue at hand):

Actions that would make a difference:

Whom do people trust to act:

Questions people have:

Tips

- Don't get stuck on perfection.
- No story will explain everything.
- More than one theme is acceptable.

Develop Themes (Mad Lib)

- People want _____ (aspirations).
- But they're concerned that _____ (main concerns).
- As people talk more about those concerns they talk about _____ (specific issue(s)).
- They say that we need to focus on _____ (actions).

For November

2022 Turning Outward Cohort



SOAR Exercise

Strengths *What can we build on?*

- What do we excel at?
- What are our greatest accomplishments?
- What are we most proud of?
- What makes us unique?
- What do we provide that is world class?
- Which of our strengths are most valuable in our community?
- What do we do or have that's better than anyone else?

Aspirations *What do we care about deeply?*

- What kind of place do our community members want to live in?
- What do we want to achieve in the future?
- What should our future library look like?
- How can we make a difference?
- What are we passionate about?
- What strategies and actions support our ideal future library?

Opportunities *What are our stakeholders looking for?*

- What are our best opportunities to help our community reach its aspirations?
- What partnerships would lead to greater success?
- What changes and trends in the community align with our strengths?
- What challenges do we see that we could reframe as opportunities?
- What needs and wants are we currently not fulfilling for our internal and external stakeholders?
- Are there gaps in the community that we could fill?

Results *How will we know we're succeeding?*

- What kind of indicators did community members identify in community conversations?
- What measures will tell us we are on track to achieve success?
- How do we translate our vision of success into tangible outcomes?
- How do we know when we've achieved our goals?

Assessing Library Usage & Trends

<https://midhudson.org/annual-report>

2020 Member Library Annual Report Data

- **Member Library Information** – [Excel](#) | [PDF](#) (*Chartered Population, Total FTE Paid Staff, Full-time Equivalent (FTE hrs./week), Card Holders, Annual Visits, Annual Reference Transactions, Number of Internet Terminals, Annual Users of Electronic Resources, Size of Building(sq.ft)*)
- **Circulation** – [Excel](#) | [PDF](#) (*Adult Fiction, Adult Non Fiction, Total Adult Book Circulation , Total Children’s Book Circulation, Total Book Circulation, Adult Non-Print, Children’s Non-Print, Total Non-Print Circulation, Children’s Total Circulation, Grand Total Circulation, ILL Borrowed, ILL Loaned*)
- **Holdings** – [Excel](#) | [PDF](#) (*Adult Fiction, Adult Non Fiction, Total Adult Books, Children’s Fiction, Children’s Non-Fiction, Total Children’s Books, Total Books, All Other Print Material, Total Audio, Total Video, Other non-print material, Total holdings*)
- **Programs** – [Excel](#) | [PDF](#) (*Adult Programs, Adult Attendance, Young Adult Programs, Young Adult Attendance, Children’s Programs, Children’s Attendance, Other Programs, Other Program Attendance, Total Programs, Total attendance*)
- **Receipts: Local Public Funds** – [Excel](#) | [PDF](#)
- **Receipts: Total Operating Funds** – [Excel](#) | [PDF](#)
- **Disbursements** – [Excel](#) | [PDF](#) (*Personnel, Print Materials, Electronic Materials, Other Materials, Capital Expense from Operating Funds, Total Bldg.Expense, Misc: [Office & lib. Supplies, Telecomm, Postage, Other Misc.], Contracts w/Library System, Total Disbursements, Capital Fund Balance*)
- **Salary Information** – [Excel](#) | [PDF](#)

Assessing Library Usage & Trends

<https://midhudson.org/annual-report>

	A	B	C	D	E	F	G	H	I	J
1		Chartered	Total FTE	Full-time equiv.	Card Holders	Annual	Ann Reference	# Internet	Annual Internet	Size of
2	Columbia	Population	Paid Staff	(FTE Hrs./Week)	(Reg. Borrowers)	Visits	Transactions	Terminals	Terminal Sessions	Building (sq.ft.)
3	Chatham *	9,459	5.40	37.50	5,076	21,296	3,588	5	418	7,838
4	Claverack	4,642	1.83	40.00	1,582	5,302	1,786	6	306	1,400
5	Germantown	1,954	1.46	36.00	1,353	3,207	40	13	1,871	3,000
6	Roe-Jan	7,115	3.80	37.50	4,184	16,007	1,600	9	866	7,500
7	Hudson	10,878	6.50	40.00	6,398	34,086	2,440	24	3,094	11,000
8	Kinderhook	6,486	4.53	40.00	3,718	13,502	2,910	16	803	2,570
9	Livingston	352	0.38	40.00	573	1,101	156	1	48	476
10	New Lebanon	2,305	3.00	37.50	1,817	2,692	5,200	5	300	3,170
11	North Chatham	997	0.95	40.00	629	752	55	3	212	1,500
12	Philmont	1,379	1.50	40.00	1,293	3,500	1,200	5	500	2,674
13	Valatie	4,344	1.64	40.00	2,074	2,472	27	6	127	1,730
14	County Total / Average	49,911	3.30	38.95	28,697	103,917	19,002	93	8,545	42,858
15										
16	Dutchess									
17	Amenia	4,436	2.32	25.00	980	5,500	900	4	415	880
18	Beacon	27,294	14.15	40.00	9,535	85,900	2,466	7	4,465	15,562
19	Beekman	14,621	6.10	40.00	7,111	16,687	2,010	8	2,194	5,200
20	Clinton	4,312	3.17	35.00	1,636	13,373	6,000	4	1,523	2,400
21	Dover Plains	8,699	4.33	40.00	4,784	14,348	1,987	9	1,511	5,000
22	East Fishkill	29,029	11.14	37.50	11,470	46,906	6,041	8	2,844	11,972
23	Fishkill	12,608	11.50	40.00	5,366	33,882	15,110	13	2,203	8,650

Assessing Library Usage & Trends

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	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Adult	Adult	Total Adult	Total Children's	Total	Adult	Children's	Total	Children's	Grand Total	ILL	ILL
2	Columbia	Fiction	Non Fiction	Book Circ	Book Circ	Book Circ	Non-Print Circ	Non-Print Circ	Non Print Circ	Total Circ	Circulation	Borrowed	Loaned
3	Chatham	20,257	11,952	32,209	17,667	49,876	18,500	2,608	21,108	20,275	79,241	18,579	10,401
4	Claverack	17,502	4,060	21,562	8,540	30,102	7,191	950	8,141	9,490	41,012	8,736	7,181
5	Germantown	4,438	2,083	6,521	3,294	9,815	3,499	655	4,154	3,949	16,956	4,480	4,590
6	Roe-Jan	8,887	4,964	13,851	6,900	20,751	13,421	565	13,986	7,465	40,561	8,015	7,336
7	Hudson	10,038	7,028	17,066	12,427	29,493	11,787	1,464	13,251	13,891	47,875	8,772	10,137
8	Kinderhook	13,584	7,306	20,890	19,115	40,005	13,117	2,182	15,299	21,297	60,136	11,421	7,289
9	Livingston	1,202	1,131	2,333	1,622	3,955	1,918	242	2,160	1,864	6,701	3,899	1,622
10	New Lebanon	5,215	2,481	7,696	7,249	14,945	7,709	1,167	8,876	8,416	25,776	5,567	6,639
11	North Chatham	3,424	1,828	5,252	4,492	9,744	4,082	474	4,556	4,966	15,745	4,166	5,728
12	Philmont	4,760	4,183	8,943	7,317	16,260	9,821	1,200	11,021	8,517	29,732	11,396	5,957
13	Valatie	4,980	2,903	7,883	8,135	16,018	6,135	987	7,122	9,122	26,304	5,850	2,541
14	County Total	94,287	49,919	144,206	96,758	240,964	97,180	12,494	109,674	109,252	390,039	90,881	69,421
15													
16	Dutchess												
17	Amenia	3,752	1,199	4,951	1,225	6,176	3,232	259	3,491	1,484	10,996	3,679	4,129
18	Beacon	16,212	13,749	29,961	25,175	55,136	32,709	986	33,695	26,161	97,846	19,665	21,637
19	Beekman	14,029	8,176	22,205	24,424	46,629	15,308	4,039	19,347	28,463	77,454	11,714	14,800
20	Chatham	2,588	1,433	4,021	3,758	7,779	2,884	343	3,227	2,108	11,543	2,895	5,838
20	Claverack	1,318	317	1,635	788	2,423	1,518	167	1,685	1,491	5,834	1,095	1,199

Assessing Library Capacity

-  Personnel
-  Finance
-  Facility
-  Policy
-  Partnerships
-  Governance
-  Marketing & Public Relations

Homework

- Organize & Compile Notes
- **Develop & Identify Themes**
- Assess Library Usage and Trends
- Complete SOAR Exercise

Next Call to be scheduled for later September

(No call in August)