

Hi Maggie,

Such a delight to chat with you earlier today. Thank you for sharing your valuable time with me! It's appreciated.

In summary from our discussion:

For more details about our processes, beyond our discussion you can view them here:

<https://www.olservice.ca/consulting-training/consulting/planning>

Note - Your Library is in the "Free" population range for OLS Support on this project, based on the requirements criteria you select, the only potential charges will be for additional in-person travel based on a cost recovery model for us at the OLS. All facilitation and work on this project is otherwise free from us, and will be conducted virtually for a larger portion of the project, as it's set out in the Project Contract.

In regards to some of the highlights and specifics we discussed:

1. We will definitely be ready to support your new project starting late March - April 2025.
2. A member of the OLS Consulting Team will be assigned as your facilitator for this blended virtual / in-person project, with a tentative 8 month to 1 year timeline, shaped according to your board's needs and expectations.
3. In terms of support, we will happily provide full project support in a hybrid of Virtual Session(s) and live in-person sessions as part of this project roll out that will suit both your board's schedule and our OLS availability. Session average about 1hr of online time per module of work. Of note, we've had great success with a "third Thursday of the month at X time" type approach, as it instills some regularity in the work and focused timelines, for your consideration.

We'll be illustrating all those details in the form of a work contract that will have all the details, work and timelines all set out to be agreed to by all parties' pre-project start to make sure everyone is on the same page.

4. As noted in our chat, we emphasize a highly customized approach to planning, ensuring the results are tailored to your unique community and reflect realistic expectations and goals. One of our key facilitation elements is to ensure your plan is realistic, attainable and focused to your community. We don't carbon copy examples or language, we help you create a product that is uniquely yours and locally relevant.

5. We recommend that if you choose to use a planning committee, that it be comprised of both Board, CEO and library staff to ensure that a very comprehensive result is achieved. The selection of who will be present is at your discretion. We'll take note at the beginning of the project as you choose and select your members.

6. Below is a bird's eye view of all the major components I mentioned in your chat, and the scope of work that'll be taken on piece by piece throughout the process to arrive at an overall project work we'll support and facilitate:



As described above in the diagram, session one, will be an orientation to all these elements from a high level and expectation setting for the work done collaboratively ahead.

We'll reach out to source any historical documentation, plans, or tools you've previously used to plan in the past, even if they are incomplete or more simply guiding documents, so we can get a flavour of your past work together as board and CEO.

Thank you so much for trusting us as the OLS to support your project.

Please let me know if I've missed anything from your chat you'd like to know a bit more about or any curiosity questions that may arise.

Looking forward to hearing about this amazing work in the future!

All the best,

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