

**Palatine Public Library District**  
**Strategic Plan, Fiscal Year 2017-2018**  
**Approved April 12, 2017**

**I. Finance/Budget – Implement efficient and effective use of funding while working within a balanced budget**

A. Goal – Study and plan for TIF retirement or declaration of surplus

1. Action – Attend any meetings held by the Village pertaining to Palatine TIF districts (annual fall meeting and as scheduled)
2. Action – Continue discussions with other governmental stakeholders regarding options pertaining to TIF district retirement (ongoing)
3. Action – Board to make decisions about use of any funds coming to Library as a result of TIF district retirement or surplus declaration including planning for any anticipated TIF income during annual budget planning process (spring and fall)
4. Action – Monitor annual Village of Palatine TIF District report to determine current equalized assessed value (EAV) of TIF Districts (reports submitted spring/early summer) <http://warehouse.illinoiscomptroller.com/LandingPage.cfm?Code=016/430/32>
5. Maintain awareness about the new Schaumburg TIF District and any impact on the Library District (ongoing)

B. Goal – Seek additional funding sources and partnerships

1. Action – Seek to apply for relevant grant opportunities (in addition to Illinois Public Library Per Capita Grant) during the fiscal year (as opportunities present)
2. Action – Identify projects, equipment, materials, or other resources which would provide added value to patrons but which may be outside the scope of the working and reserve budgets (ongoing)
3. Action – Work with affiliates (Friends and Foundation) or other partners to secure funding for items identified in Action item I.B.2 above (ongoing)
4. Action – Establish and maintain partnerships which result in benefit to patron community (ongoing)
5. Action – Conduct self-study related to funding and development (fall planning meeting and ongoing)

C. Educate patrons about Library funding

1. Action – Post information about funding on the Library’s website (ongoing)
2. Action – Continue to post current and past years’ mission-critical planning and financial documents on the Library’s website (ongoing)
3. Action – Share information about funding sources within the Library and with the patron community as opportunities become available (ongoing)

D. Communicate and collaborate with other governmental entities

1. Action – Interact with Trustees from other Library District Boards (ongoing as opportunities present)
2. Action – Facilitate organization of and attend intergovernmental events for discussion and exchange of information (ongoing)

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3. Action – Work cooperatively regarding financial matters and share resources for mutual fiscal advantage (ongoing)
4. Action – Invite elected officials to one or more Board meetings and/or to meet with the Director/Trustees to discuss funding and other Library topics (as possible)

E. Analyze opportunities to extend service to eligible unserved areas

1. Action – Identify and evaluate serviceability of eligible unserved areas (ongoing)
2. Action – Continue education and advocacy within eligible unserved areas (ongoing)
3. Action – Evaluate unserved areas’ willingness to join Library District (ongoing)

F. Study and define plans for appropriate ballot initiatives to address financial needs

1. Action – Identify available ballot initiatives to address financial needs (ongoing)
2. Action – Retain financial advisor to develop financial planning tools (summer)
3. Action – Using resources developed by financial advisor, define short and long term strategies to address financial needs (fall)
4. Action – Remain aware of tax revenue legislation affecting Library District funding (ongoing)

**II. Maintain viable facilities for the delivery of Library services**

A. Complete initiatives in the Special Reserve Fund Plan

1. Action – Utilize the plan throughout the year to schedule and enact improvements and repairs (ongoing)
2. Action – Consider refurbishments, including renovations and furnishings, within the working and special reserve fund budgets (ongoing)
3. Action – Update the plan throughout the year to reflect work completed or deferred as appropriate (ongoing)

B. Consider alternate approaches to providing services to the southwest and northeast portions of the District

1. Action – Maintain awareness of service options and models (ongoing)
2. Action – Update cost-per-use study of the branches; use the update and analysis of branch use statistics to inform service and program decisions (fall planning meeting and ongoing)
3. Action – Consider alternative service venues or options as appropriate (ongoing)

C. Maintain a written Facilities Plan

1. Action – Facilities Manager will provide the Director with quarterly updates on the FY 17/18 plan (quarterly)
2. Action – Update regular and preventative maintenance plans (as needed)

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3. Action – Facilities Manager and Director to create plan for FY 18/19 using the Special Reserve Fund Plan and anticipated needs of facilities (March)
  4. Action – Budget planning and creation for FY 18/19 will use information from the Facilities Plan (April through June)
- D. Promote and achieve energy savings and other green initiatives
1. Action – Consider energy efficiency when adding or replacing equipment, including replacing lights at Main Library with LED options (ongoing)
  2. Action – Coordinate efforts to recycle, reduce paper, and utilize “green” products and equipment in library operations, noting cost savings or potential cost savings (ongoing)
  3. Action – Maintain a list of current and potential initiatives which conserve energy or demonstrate ecologically conscientious principles (ongoing)
  4. Action – Continue proactive stance on green initiatives (ongoing)
- E. Implement replacement of worn furniture for the current year per plan
1. Action – Replace or add any furnishings still needed in the Main Library’s public areas (ongoing)
  2. Action – Assess furniture needs at North Hoffman and Rand Road branches and replace or add as determined (ongoing)
  3. Action – Assess furniture needs for staff workrooms and other staff spaces and replace or add as determined (January-April)
  4. Action – Dispose of used furniture in the most fiscally and ecologically responsible manner (ongoing)
- F. Finalize plans for North Hoffman Branch lease expiration (lease expires September 2017)
1. Action – Review NHB lease agreement and submit any proposed changes to landlord and attorney (July-August, FY 17-18)
  2. Action – Execute lease, if agreed, for North Hoffman Branch on or before September 30, 2017 (September, FY 17-18)
- G. Finalize plans for Rand Road Branch lease expiration (lease expires February 2018)
1. Action – Review RRB lease agreement and submit any proposed changes to landlord and attorney (October)
  2. Action – Execute lease, if agreed, for Rand Road Branch on or before February 28, 2018 (December)
- H. Conduct space needs study (last completed in 2008)
1. Action – Review results of 2008 space needs study, subsequent renovations, and 2016 Community Survey (summer)
  2. Action – Retain consulting partner to evaluate results and conduct new study, with consideration for both local needs and industry-wide trends (fall)

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3. Action – Identify and prioritize strategies to meet space needs, including budgetary implications (winter)

- I. Identify and prioritize capital needs for next 3 to 8 years as defined by 2016 engineering study
  - 1. Action – Review results of 2016 engineering study (summer)
  - 2. Action – Identify and prioritize capital needs through 2025, including budgetary implications (fall)
  - 3. Action – Report results to Board (winter)

**III. Human Resources – Support and strengthen human resources initiatives in order to forward the mission of the Library**

- A. Provide qualified and contributing staff members to carry out library services
  - 1. Action – List preferred experience and skills and hire candidates with minimum qualifications or better for each posted vacancy (ongoing)
  - 2. Action – Review job descriptions annually to ensure relevance and accuracy (before or concurrent with annual performance review process)
  - 3. Action – Strive to assign appropriate roles to staff incorporating annual goals for each employee that tie back to the Strategic Plan (spring performance review and ongoing)
  - 4. Action – Develop and maintain new employee orientation and training curriculum to align staff with organizational and departmental goals (ongoing)
  - 5. Action – Provide specific training or continuing education for the purposes of creating, developing, and/or maintaining specific skills sets (ongoing as needed)
- B. Strive to maintain an appropriate compensation package
  - 1. Action – Continue to utilize market studies as a guide in creating salary schedules (ongoing and for budget planning in the spring)
  - 2. Action – Include performance pay as an element of compensation (ongoing)
  - 3. Action – Attract and retain staff as possible within budget (ongoing)
  - 4. Action – Monitor legal requirements and enact procedural changes, as required, related to healthcare insurance (ongoing)
  - 5. Action – Educate Board and staff regarding compensation (ongoing)
- C. Continue staff and Board development within an established budget
  - 1. Action – Provide in-house training and education opportunities for staff and Trustees (ongoing)
  - 2. Action – Continue sending staff and Trustees to relevant off-site training and education events (ongoing)
  - 3. Action – Require sharing of information following training and education sessions, and evaluate the benefits of all sessions (ongoing)
  - 4. Action – Conduct an annual Staff Development Day event (fall)

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- D. Continuously evaluate organizational structure and system-wide staff needs
  - 1. Action – Seek feedback from managers regarding positions and functions needed and determine need for revision, expansion, or elimination of any functions or positions (ongoing)
  - 2. Action – Study statistics and costs per service to determine appropriate staffing levels (ongoing)
  - 3. Action – Benchmark staffing levels against other area libraries (ongoing)
  
- E. Continue succession plan training and staff cross-training
  - 1. Action – Review and update current succession/cross-training plans (July)
  - 2. Action – Director will review with or train managers on duties as specified in the updated succession/cross-training plans (ongoing)
  - 3. Action – Managers will maintain a list of duties within departments and name primary and backup staff for each duty/function (ongoing)
  - 4. Action – Encourage and assign staff to conduct appropriate-level work in one’s own and other departments for the purpose of development and to broaden options for covering service desks and duties (ongoing)
  
- F. Continue appropriate use of volunteers
  - 1. Action – Implement the provisions of the volunteer plan and policy (ongoing)
  - 2. Action – Promote volunteer opportunities and track benefits of volunteer contributions (ongoing)
  - 3. Action – Create new tasks for volunteers as appropriate (ongoing)
  
- G. Review Policy 9: Human Resources
  - 1. Action – Notify Managers of upcoming review (September)
  - 2. Action – Administrative staff reviews laws governing the HR policy (October)
  - 3. Action – Policy Committee and Administrative staff will review current policy (November-December)
  - 4. Action – Submit policy and recommendations for attorney review (December)
  - 5. Action – Board will review policy and subsequently approve with any necessary revisions (January)

**IV. Technology – Sustain, grow, and develop technology initiatives that connect patrons with information and resources**

- A. Complete all initiatives as detailed in the current Technology Plan
  - 1. Action – Achieve all goals in the Library’s annual Technology Plan (ongoing)

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- B. Update the current Technology Plan as required
  - 1. Action – Revise and update the current plan prior to the budget planning process in the spring and again, as needed, following budget approval in June (June/July)
  
- C. Continue study of available Integrated Library Systems (ILS)
  - 1. Action – Identify eligible ILS solutions and partnership opportunities (June/July)
  - 2. Action – Identify planning steps necessary for any potential future migration (August)
  - 3. Action – Recommend action related to current ILS contract (October)
  
- D. Complete all initiatives of the 2017 website redesign project
  - 1. Action – With contracted developer, redesign and upgrade website to promote usability on all platforms/devices (summer/fall)
  - 2. Action – Launch new website after ensuring all staff are trained and website has been properly tested (fall/winter)
  - 3. Action – Develop maintenance strategy to ensure website is consistently up-to-date and secure (ongoing)

**V. External and Internal Communications – Enhance and improve current communications methods**

- A. Review all Library publications annually and revise format or content as needed
  - 1. Action – Departments will ensure the Communications and Marketing Department has information about existing print publications and need for any new print publications (ongoing)
  - 2. Action – Review all publications for conformity with established Style Guide and determine appropriate language translations as needed (ongoing)
  - 3. Action – Continue periodic walkthrough of library spaces to check for outdated signs, posters, or information (ongoing)
  
- B. Review the Library’s digital content frequently to ensure current information and accessibility
  - 1. Action – Develop and implement content strategy to define how content is planned, created, delivered, and managed on the website and social media (ongoing)
  - 2. Action – Continue effective use of the Main Library’s digital displays according to the provisions of the digital display monitor guidelines (ongoing)
  - 3. Action – Review email publications annually and revise format or content as needed (ongoing)

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C. Implement methods to obtain comments, input, and feedback from patrons, and methods to respond

1. Action – Identify resources and implement methods to collect and analyze community information (ongoing)
2. Action – Continue to provide comment slips throughout library facilities and to respond to patron comments and concerns (ongoing)
3. Action – Continue to provide methods for patrons to comment about library programs (ongoing)
4. Action – Continue to receive and post replies about the library via social media channels and develop new response methods as appropriate (ongoing)

D. Update marketing plan as needed

1. Action – Create a revised marketing plan to be conducted during the fiscal year (July-August)
2. Action – Include a sub-plan for Library signage in the marketing plan (July-August)
3. Action – Enact plan provisions and modify plan strategies and initiatives seeking feedback from target audiences as possible (September-June)

**VI. Programs and Services – Continue to provide relevant, cost-effective services and programs to the public**

A. Continue to evaluate programs (including classes) and events offered to the public

1. Action – Identify high-demand and well-attended programs and duplicate these programs or program topics as appropriate (ongoing)
2. Action – Create a sense of community through programs by encouraging participation and dialog by patrons with shared interests (ongoing)
3. Action – Continue to offer programming in support of small businesses and job seekers (schedule at least one partner program per quarter)
4. Action – Consider offering “after-hours” programs and/or special events/nights (ongoing)

B. Review library services annually and revise as needed

1. Action – Support literacy through provision of take-home learning activities, “ready to read” programs, and literacy programs (ongoing)
2. Action – Create opportunities for patron participation/conversation through displays, take home activities, art walls, and social media (ongoing)
3. Action – Evaluate library procedures to enhance patron experiences (ongoing)
4. Action – Evaluate services for effectiveness, adding and removing services as appropriate to community needs (ongoing)

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- C. Create and maintain flexible, interactive spaces to support programs and services
  - 1. Action – Continue to rotate and refresh literacy activities in the Early Literacy Area and within library programs (July-September and ongoing)
  - 2. Action – Continue study of service desk transactions and explore alternative service models (September-December and ongoing)
  - 3. Action – Continue development of special collections, including health, business, and genealogy/local history collections on the Main Library’s second floor (ongoing)
  - 4. Action – Research available relevant resources to support innovation and science, technology, engineering, art, and math (STEAM) curriculum, including development of gaming and maker spaces (ongoing)

**VII. Collections – Maintain and develop highly relevant material collections**

- A. Maximize availability of and accessibility to digital resources within parameters of the materials budget
  - 1. Action – Continue acquisition and promotion of digital ebooks and audiobooks (ongoing)
  - 2. Action – Maintain a collection of useful subscription digital resources to ensure the greatest benefit for patrons within budget (ongoing)
  - 3. Action – Explore digital resource enhancements and enable updated features as appropriate (ongoing)
- B. Continue to ensure relevant, current materials within collections
  - 1. Action – Select a wide variety of materials within budget and continue weeding of underutilized or outdated materials according to established weeding guidelines and schedules (ongoing)
  - 2. Action – Utilize statistical and trending data to determine materials budget allocation (August), and to make decisions about development of the collections (ongoing)
  - 3. Action – Consider user research, survey methods, and other resources to collect and study information about use of the collections District-wide (ongoing)
- C. Study alternate methods of providing print and non-print materials, and implement methods as appropriate
  - 1. Action – Continue and possibly expand checkout of preloaded ereaders (ongoing)
  - 2. Action – Consider further implementation of digital media content delivery services (July - September)
  - 3. Action – Consider additional circulating digital resources (summer and ongoing)
  - 4. Action – Investigate and implement alternate display and/or cataloging methods for promotion of materials and related items (ongoing)



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- D. Update and follow provisions of the Collection Development Plan
  - 1. Action – Review plan with librarians (summer)
  - 2. Action – Continue development of print and digital resources following provisions of Collection Policy and the Collection Development Plan (ongoing)

**VIII. Connect with the Community – Engage patrons where they are in person or online**

- A. Continue staff participation in community organizations, events, and initiatives
  - 1. Action – Maintain memberships and affiliations with current community groups and organizations (ongoing)
  - 2. Action – Add staff as members or liaisons to additional appropriate community groups or organizations (ongoing, with target date of January 2018)
  - 3. Action – Participate in community festivals, celebrations, or events for the purpose of promoting the Library and to enhance the experience of event attendees (ongoing)
- B. Maximize potential of the Library’s social media channels
  - 1. Action – Inform, listen, respond, and engage our community members via social media (ongoing)
  - 2. Action – Choose social media channels based on interests, content type, and format (ongoing)
  - 3. Action – Ensure sufficient training and orientation for all staff participating Library’s social media communications (ongoing)
- C. Explore opportunities to schedule programs or events in other community venues as feasible
  - 1. Action – Schedule alternate-venue programs (schedule at least one off-site program per quarter)
  - 2. Action – Study alternate venues in the community for library program suitability (ongoing)
- D. Create opportunities to celebrate the diverse cultural heritage of our community
  - 1. Action – Plan and conduct programs celebrating cultural heritage (ongoing)
  - 2. Action – Partner with community groups to support programs, displays, or events celebrating our cultural heritage (as opportunities present)
  - 3. Action – Promote resources that provide information or entertainment related to cultural heritage (ongoing)
  - 4. Action – Develop programming series around one or more cultural identity (ongoing)
- E. Review 2016 community survey and begin alignment of results with self-study findings
  - 1. Action – Draft and publish objective summary report of survey data (June)
  - 2. Action – Develop and implement communication plan to demonstrate how Library has applied efforts in response to survey data (fall)

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3. Action – Engage Board to communicate outcomes of survey report and any relevant future plans (winter)

F. Develop and implement plan to connect with and grow community advocacy in support of Library initiatives

1. Action – With Board, develop strategy to connect community needs with Library initiatives (summer)
2. Action – Identify and connect with strategic community partners (summer)
3. Action – Maintain Board Community Connection Committee to facilitate organization of intergovernmental events for discussion and exchange of information on Library initiatives (ongoing)