

Strategic Plan 2018-2021



Vision

Inspiring connection,
curiosity, and joy.

Mission

We welcome everyone to access
diverse materials, collaborative spaces,
technology, programs, and services.



Experience

We strive to ensure that
individuals have exceptional
interactions with the Library
and are connected with
resources and services that
increase their quality of life.

We exceed expectations.



Engagement

We work continuously
with the community to
increase our reach and
expand our impact.

**We are a valued
community partner.**



Endurance

We strive for sustainability
in our practices, facilities,
and human and
financial resources.

**We are a resilient
organization.**



Palatine Public Library District
Strategic Plan 2018-2021

Focused for the Future



Introduction

The Palatine Public Library District (Library) provides a wide variety of library programs and services to a population of 89,000 in the northwestern suburbs of Chicago. The Library operates three facilities: a 96,000 square foot main library and two branch libraries (North Hoffman and Rand Road).

This plan represents the overall strategy for the Library over the next three years and is presented to the Board of Trustees for approval in 2018. Upon approval, Library staff will finalize an activity plan to support the overall strategy and evolve as we work toward goals. Staff will regularly review progress toward meeting plan goals and report to the Board.

Our planning process was inclusive and enlightening. We remain committed to our community and core services and are excited about the focus this plan will bring through 2021. We hope this plan inspires growth and change over the next three years that lead to increased impact in our community.

Background

This planning process allowed the Library to review all planning documents and data to bring focus and direction under one document, thus uniting the Library's direction in one plan. The Library has many assets and has spent time developing plans for financial and capital needs in the future. Current strategic and long-range plans exist to guide the Library's activities but lacked inspiration from the staff and community. The Library engaged in this planning process to spend time learning about community needs and mining current plans and data with input from the Board and staff to find strengths and momentum allowing focused efforts going forward.

Amanda E. Standerfer from Fast Forward Libraries, a strategic planning consultant and librarian, helped guide the planning process. The planning team included:

- Debby Brauer, Library Trustee
- Jeannie Dilger, Executive Director
- Andrea Lublink, Communications and Marketing Manager
- Susan Conner, Technology Manager
- Maureen Galvan, Assistant Director for Support Services

The planning team met regularly starting in March 2018 to design, manage, and execute the planning process.

Planning Process & Data Highlights

In order to create a cohesive, actionable plan, we reviewed a wide variety of existing data and spent time talking with community members at focus groups and a community stakeholder lunch. The data we reviewed included a recent community survey, interviews held during the website redesign process, library reports and statistics, existing library plans and consultant reports, strategic plans for surrounding libraries, and strategic plans for other community organizations and institutions.

The 2016 community survey was key for understanding perceptions about the Library and areas of focus for the future. The survey gave several conclusions that dovetailed with the planning process:

- The community values the collection and variety of materials.
- Excellent customer service is a strength.
- The Library should continue to learn from the community about needs and how to respond.
- Evaluation and showing impact are important.
- Budget constraints require the Library to prioritize.

Library strengths and challenges emerged during meetings with the Board, staff, and community:

- The Library increases quality of life in the community and provides opportunities for all to learn and connect.
- Library programs are enjoyed by all ages.
- Staff members go above and beyond, and the community welcomes the opportunity to build stronger relationships with them.
- Building issues (how space is used and overall maintenance of facilities) and funding constraints are major concerns.
- The Library plays a unique community connector role (social, educational, and entertainment), both in and out of the building.
- Information and access to technology are greatly valued by the community.

We used targeted questions during the focus groups to increase understanding of the community's concerns and how the Library could best respond. We specifically asked about how the Library increases the quality of life in the community, how the Library could increase engagement with the community, and how the Library could provide exceptional experiences for patrons. Focus group attendees gave a wide range of comments, including current library activities and possible activities and areas of focus for the future.

This table shows a summary of feedback received at the focus group sessions:

Quality of Life	Community Engagement	Patron Experience
Safe, clean, comfortable	Connecting/partnering with nonprofits	Engage proactively with visitors
Connection to community	Programs	Volunteers
Educational programs	Meeting rooms for community use	Think about experience from when patron walks in through entire interaction
Access for all, access to information	More communication about what's going on	Spaces in library for quiet, social, study, etc. (café)
Quiet space, social space (café)	Cross promotion of what's happening in the community	Communication about what's going on, resources, suggestions
People trust the Library	Think about reaching those that aren't naturally drawn to the Library	Build relationships

The planning team helped narrow the vision, mission, and strategic initiatives for review by the Board at a retreat in late July. With a plan starting to take shape, staff added their input during two retreat sessions in mid-August. The retreat sessions brought cohesion to the developing plan and allowed for the plan's design to emerge.

Vision

Inspiring connection, curiosity, and joy.

Our vision is what we hope to achieve for our community. We want our community to connect, in and outside of the Library. We hope to inspire curiosity in individuals and then satisfy their curiosity. Connecting people and inspiring curiosity is joyful work. Joy is what we want to manifest in the community. We believe that our vision is achievable if we intentionally and effectively carry out our mission.

Mission

We welcome everyone to access diverse materials, collaborative spaces, technology, programs, and services.

Our mission is the core of what we do as a library and how we plan to achieve our vision. Welcoming everyone is our strength and key to carrying out our work and strategic plan. Our mission states what we promise to provide to our community.

Strategic Initiatives

This plan is divided into three areas of focus: Experience, Engagement, and Endurance. These strategic initiatives emerged during the planning process after reviewing community survey and library data, meeting with the Board and staff, and discussing with the planning team. At the Board retreat, we affirmed these three strategic initiatives as key to the Library's success going forward.

Outcomes

What's working: The staff is committed to working together to serve the community. They have a strong sense of customer service and creating great experiences for patrons. Mutual joy is part of every transaction and interaction at the Library.

Staff are not afraid of change. The pace of change can be overwhelming and we continuously work to manage change and focus on what's needed to implement change.

Overall, staff are committed to the Library's future and look forward to what's next. We can do more to develop our staff, as they are enthusiastic about their jobs and want to make a difference. We can build on this strength and think about how to equip staff with additional skills to benefit patrons and increase job satisfaction.

What can be improved: We want to do more for our community. The limitations of our budget get in the way of our ability to do new things and creatively expand current offerings. We respond to the scarcity of resources by being resilient. Increasing operating funds is necessary to carry out all aspects of this plan. Having this plan in place will help us develop the message about why we need additional funding. Increasing our evaluation efforts will help us tell our story of impact in the community with clarity.

We need to consider how the community interacts with the Library and our physical and virtual spaces. During the focus groups, participants noted that interior spaces (at the main library and branches) could flow better and allow for better interactions and access to materials. We can use our physical spaces to create better experiences to promote increased usage.

What else is needed: We can increase communication to build awareness of our services and programs. We can discover how our community learns about the Library and all that we offer. We can think strategically about our communications and evaluate what's effectively reaching people.

We should evaluate our programs and services to know what is having an impact. The Library's resources are stretched with all we offer to the community. It's not sustainable to "do more with less" indefinitely. Lacking additional operating funds, we need to know what's making the biggest difference so we can focus.

We need to be sustainable. While sustainability is part of everything we do, our need to be sustainable is particularly evident when it comes to our facilities and finances.

Goals, Activities, Measures

The following pages summarize the strategic plan with additional detail for each strategic initiative, including potential activities for each goal and possible metrics. Library staff will draft the activity plan that will serve as an implementation guide. We will present regular progress reports at future Board meetings.



Experience

We strive to ensure that individuals have exceptional interactions with the library and are connected with resources and services that increase their quality of life.

We exceed expectations.

We know that our staff, collections, and facilities are strengths. We are poised to move forward in a coordinated way that benefits our community.

Our staff members are eager to learn. We can learn from each other (cross-training) and from others (formal training, community surveys, etc.). We can work to create great experiences for every person who interacts with us, virtually and in person. This includes thinking about the design of our spaces and what we want people to do in those spaces.

Our collections are diverse in subject and format. Providing access to our collections is a core function and connects to everything else we do as an organization. We can spend time learning about how people use our collection. Then we can work to make access easier and more intuitive for staff and the community.

Goal	Possible Activities
1) <i>The library has comfortable, flexible spaces that encourage use and connection.</i>	<ul style="list-style-type: none"> • Complete space needs assessment • Remodel interior space to allow for more efficient use and areas for socialization • Redesign/modernize display space
2) <i>The library's collection is vibrant and convenient to access.</i>	<ul style="list-style-type: none"> • Evaluate the mobile app • Evaluate our library catalog software to determine future needs • Upgrade phone system
3) <i>The library is committed to quality patron interactions.</i>	<ul style="list-style-type: none"> • Review policies and procedures to ensure patron-first focus • Consider a "secret shopper" program to learn about patron experience • Implement evaluation framework that regularly collects data from patrons • Define "exceptional" service; create training and checklist for evaluation

Potential Measures of Success

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| <ul style="list-style-type: none"> • Regular patron surveys reporting on satisfaction (situational and long-term) • Track key indicators of satisfaction (collections, staff, facilities) | <ul style="list-style-type: none"> • Post-program feedback surveys • App downloads • Staff satisfaction surveys • Secret shopper reports |
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Engagement

We work continuously with the community to increase our reach and expand our impact.

We are a valued community partner.

A successful library works together with the community. Some people naturally gravitate to our services and attend our programs, but barriers exist that keep others away. Welcoming everyone is our value. We can work harder to spread this message in ways it can be received by those not naturally inclined to utilize the Library.

We have worked to create strong partnerships with community organizations and value what we learn through joint efforts. The allocation of resources in our community means that increased partnerships and joint efforts are needed to provide increased value to the community. The Library brings a unique set of skills and knowledge to these efforts that we can continue to communicate about and promote. We can proactively look for partnerships that are mutually beneficial.

Goal	Possible Activities
1) <i>The community has high awareness of library services and programs.</i>	<ul style="list-style-type: none">• Create comprehensive communications plan that includes branding, social media, and messages• Evaluate signage (internal and external) for all locations
2) <i>The library interacts with its diverse community to discover and respond to current needs of all groups.</i>	<ul style="list-style-type: none">• Increased visits to bilingual groups• Create opportunities for conversations/discussions with the community to learn more about their needs and how the library can respond
3) <i>The library creates and deepens meaningful partnerships with local organizations and businesses.</i>	<ul style="list-style-type: none">• Consider deeper relationships with groups using meeting rooms• Staff and trustees assigned to attend local organization meetings• Inventory partnership efforts and create criteria for assessing which partnerships to pursue

Potential Measures of Success

<ul style="list-style-type: none">• Regular patron surveys reporting on satisfaction (situational and long-term)• Post-program feedback surveys• Partner criteria reviewed• Plan for partnership development	<ul style="list-style-type: none">• Annual reflective learning focus groups (with partners and community in general) to gather input about how the library is doing and future community needs• Number of community meetings attended
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Endurance

We strive for sustainability in our practices, facilities, and human and financial resources.

We are a resilient organization.

To become a stronger organization, we must pay attention to human, financial, and physical resources. The data we gathered indicated pride in how the Library has stretched the budget. While this is noble, it's not sustainable and places a burden on the Board and staff. It creates a culture of scarcity and anxiety that the lack of resources negatively impacts the Library's ability to carry out its mission.

We have the opportunity to increase staff job satisfaction in a variety of ways. Staff are interested in learning more about each other and what other positions/departments do at the Library. Deeper connection with all aspects of the Library will promote retention. Improving recognition and benefits will also increase retention and attract quality new employees.

Goal	Possible Activities
1) <i>The library is a trusted steward of resources.</i>	<ul style="list-style-type: none">• Create comprehensive financial plan for the future• Increase transparency by posting more financial information on website• Develop alternative revenue sources• Conduct operating referendum campaign
2) <i>The library is a preferred employer that values staff development and retention.</i>	<ul style="list-style-type: none">• Review hiring practices and incorporate values/culture statement• Develop staff cross-training plan• Review and improve staff benefits package• Formalize staff recognition and retention programs
3) <i>The library's systems and facilities are resilient, modern, and efficient.</i>	<ul style="list-style-type: none">• Develop maintenance plans for all facilities• Create technology plan with replacement guidelines• Increase green practices

Potential Measures of Success

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| <ul style="list-style-type: none">• Financial, maintenance, technology plans kept up to date• Staff satisfaction surveys (especially consider hiring, retention, and recognition) | <ul style="list-style-type: none">• Sustainable budget that meets community needs• Energy audit |
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Next Steps

After this plan is adopted by the Board, staff will finalize the activity plan to guide implementation efforts. Implementation will be an ongoing process, as the timing of certain activities are determined by priority and sequence. We will review and adjust the activity plan on an annual basis after review of progress made by staff.

Evaluation of progress toward strategic plan goals will evolve during implementation. Staff will finalize measurements for each strategic initiative after determining what data to collect for specific activities. Some evaluation aspects, like community surveys, will report on progress for several goals, while other goals will have specific metrics collected during implementation. We are committed to reporting progress and opening channels for communication and continued input as we move forward.

Finally, we commit to a comprehensive review and update of this plan at its completion. We have confidence that this plan will move us significantly forward and anticipate using this process as a best practice for maintaining momentum and an institutionalized way of operating. This plan is just the first step, and we are committed to moving forward together to strengthen our library well into the future.