

Approved by the Library Board of Trustees on November 22, 2021

Winnetka-Northfield Public Library District

Strategic Plan

Version: December 21, 2021



Introduction

Steering Committee

Sydney Clark, Assistant, Branch Services

Monica Dombrowski, Library Director, Administration

Amanda Garrity, Manager, Youth Services

Lindsay Goldstein, Librarian, Youth Services

Steve Kline, Manager, Digital Services

Nick Mall, Manager, Adult Services

Sarah Quish, Manager, Marketing & PR

Mark Swenson, Manager, Information Technology

Courtney Volny, Manager, Customer Relations

Nicola White, Business Services Coordinator, Administration

All Other Staff

Maddy Belk, Librarian, Youth Services

Natalie Blaser, Assistant, Youth Services

Jill Brasseur, Librarian, Adult Services

Michael Cianfrani, Web Services Specialist, Digital Services

Erin Collins, Librarian, Adult Services

Rebecca Ganellen, Page, Customer Relations

Stephanie Girardi, Supervisor, Tech Services

Stephanie Gonzalez, Assistant, Branch Services

Jimmy Gonzalez-Vicker, Technology Librarian, Digital Services

Betsy Griebenow, Assistant, Adult Services

Shannon Hahle, Assistant, Customer Relations

Sue Hurley, Page, Customer Relations

Anna Jaich-Westine, Assistant, Tech Services

Amelia Kmiec, Librarian, Branch Services

Lindsay Goldstein, Librarian, Youth Services

Brandon Marshall, Librarian, Branch Services

Melissa Morgan, Manager, Branch Services

Sandy Penn, Specialist, Digital Services

Pattie Phelan, Assistant, Customer Relations

Lisa Porter, Assistant, Customer Relations

Molly Schoenherr, Librarian, Adult Services

Scott Siegel, Assistant, Customer Relations

Kathy Skiba, Graphic Designer, Marketing & PR

Tyler Steinemann, Assistant, Customer Relations

Nancy Stern, Page, Branch Services

Mike Strohm, Page, Customer Relations

Margie Surpless, Assistant, Branch Services

Amber Urich, Librarian, Youth Services

Ben Weinstein, Assistant, Customer Relations

Mark Winter, Assistant, Branch Services

Jim Young, Page, Customer Relations

Process and Approach

The plan includes...

Alignment with community needs.

Mission, vision, and organizational values statements.

Strategy framework.

Institutional, Service, and Organizational strategies with investments, initiatives, and implementation actions.

3-year strategic budget.

Phasing with priorities.

Rollout plan.

The plan is data-driven and customer focused

Held stakeholder conversations and interviewed participants across the community.

Gathered, mapped, and studied community, segmentation, and library usage data.

Incorporated public library best practices and key industry trends.

Engaged staff-based steering committee through workshops, weekly meetings, and multiple communication channels.

Engaged all staff in multiple interactive workshops and communication channels.

Prepared key findings and identified gaps and opportunities.

Evolved strategies based upon community and staff findings.

Addressed customer, community, organizational, and staff priorities.

Utilized a logic-model based approach.

Mission, Vision, Values



Workplace Culture

Values
 To meet the expectations of our customers and community, these values guide, inspire, and nourish us:

Passion Creativity Excellence Responsiveness

Who We Are

- We are generous with our time, talents, support for our customers, and support for each other.
- We share a passion for learning and connecting people to resources that teach, inspire, and entertain.
- We are innovative, responsive, flexible, engaged, and dedicated to our work.
- We are defenders of intellectual freedom and the right for everyone to enjoy our diverse collections, programs, and services.
- We are stewards of our facilities and take pride in how they serve our community.
- We employ professional standards for library work to guide our ideas, decisions, and actions.

How We Work

- We work with empathy and respect for individual experiences and perspectives.
- We partner with our community to expand and enhance collections, programs, services, and facilities.
- We are open to change, listen to understand, and collaborate with others to find better solutions.
- We look for the bright side in every person and every situation.
- We are trustworthy stewards of resources and use them to provide something of interest for everyone in our community.
- We find joy in representing our library and seek opportunities to spread the word about all the great things we offer.

Strategies and Focused Work

Service Strategy

Animating theme: **Enrich family life**

Goals:

In-Person Services

Virtual Services

Objectives:

Enhance In-Building Experience

Reinvent Online Experiences

Focused Community Engagement

Mission:

The Winnetka-Northfield Public Library District is a community resource for the advancement of knowledge, and a provider of innovative and informative cultural enrichment for all ages.

Vision:

We aspire to be a recognized leader and collaborative partner in our communities, and an innovator in library best practices.

Customer Service Vision:

Highly engaging and responsive services in buildings, online, and in the community.

Organizational Strategy

One library, two villages

Growing Leaders

Innovation Culture

Best Practices

Productivity Tools

Staff Development Tools

Innovation Tools

Institutional Strategy

Resilient & future focused

Resource Alignment

Board Forward

Facilities Development

Brand Development

Customer Relationships

Align Key Elements

Facility Feasibility Plans

Rebrand and Marketing

Plans

Institutional Strategy

Description	The Library is one system comprised of multiple integrated service delivery methods including two buildings, digital services, and community engagement. The service approach is to provide highly engaging and responsive services both in-person and online. These investments will create a thriving, resilient, and future-focused organization with a robust foundation for service evolution during the life of the strategic plan (2022 and 2025) and beyond.
Outcome	An organization that acts as "One District" with a single, shared vision and inspired culture.

Institutional Strategy: Overview

<i>Item</i>	<i>Strategy 1</i>	<i>Strategy 2</i>	<i>Strategy 3</i>	<i>Strategy 4</i>	<i>Strategy 5</i>
	Resource Alignment	Board Forward	Facilities Development	Brand Development	Customer Communications
Focused Work	IS1: Align Key Elements		IS2: Facility Feasibility Plans	IS3: Rebrand and Marketing Plans	
Description	The Library's resources are aligned to implement the strategic plan, including staff, organization, budget, and services.	The Board is visionary in approach, affirmative in implementing the strategic plan, respectful of the library's operational boundaries, and educated on roles and responsibilities.	The two library buildings are expanded and/or revitalized with affirmative customer, community, and Village support.	The Library grows community and customer mindshare through a comprehensive brand program.	The Library expands on its history of successful highly engaging and responsive services with existing and new customers using continual customer feedback.
Outcome and Promise	A thriving, resilient, and future-focused organization with bandwidth to sustain and grow library services.	A visionary Board that stewards strategic plan implementation and supports staff in their drive to serve the community.	Library buildings that are inspirational, comfortable, and flexible in order to meet evolving customer and community needs.	The Library is seen as the "go-to" place -- in-person, online, and in the community.	An organization that builds customer loyalty and use by making meaningful connections through physical, virtual, and community-based communication and interactions.
How We Define Success	In six months, resource alignment is completed. In three years, fully funded digital services, community engagement, and support services.	In six months, implementation of a new annual staff survey that provides feedback on Board performance.	In two years, demonstrated community consensus and funding commitment for implementing building expansion plans.	In three months, completion of brand strategy project. Updated marketing efforts commence immediately upon completion of the new brand strategy.	In six months, implement enhanced statistical tracking/analysis tools to provide information about library usage and trends based upon strategic plan investments.

Implementation:

IS1: Align Key Elements

<i>Elements</i>	<i>Description</i>
Description	Functionally align staff, organization, and budget to implement the Strategic Plan.
Phase	Priority 1: start in FY21-22 Q3 (Jan, Feb, Mar 2022)
Objectives	<p>By 3.31.22:</p> <ul style="list-style-type: none"> Align existing staff positions to deliver in-building, online, community, and support services. Secure approval for a three-year spending plan that leverages operating budget and capital reserves to fund the implementation of the strategic plan. Create a formal on-boarding and training plan for new and existing Trustees.
Measures	Completion of tasks within allocated timeframes.
Budget	3-year total: \$62,000 (staff: \$62,000 + other implementation: \$0)
Obstacles & Dependencies	<ul style="list-style-type: none"> Lack of funding and staff. Board approval.
Ownership	Owner: Monica/Nicola. Assistant: Amber/Molly. Team: Lisa, Rebecca, Stephanie GD.

Implementation:

IS2: Facility Feasibility Plans

<i>Elements</i>	<i>Description</i>
Description	Investigate short-term and long-term facility expansion, renovation, and utilization at both locations.
Phase	Priority 2: start in FY21-22 Q4 (Apr, May, Jun 2022)
Objectives	<ul style="list-style-type: none"> By 6.30.22: Complete a short-term improvement feasibility study for each location to explore immediate needs such as space use, wayfinding, and customer flow, among others. By 9.30.22: <ul style="list-style-type: none"> Prepare a long-term expansion/revitalization study for each location. Prepare a teen center pre-feasibility study for each location.
Measures	Completion of tasks within allocated timeframes.
Budget	3-year total: \$35,000 (staff: \$0 + other implementation: \$35,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> Lack of funding and staff. Board approval.
Ownership	Owner: Nicola/Amanda. Assistant: Jill. Team: Jimmy, Maddy, Margie, Nancy, Tyler.

Implementation:

IS3: Rebrand and Marketing Plans

<i>Elements</i>	<i>Description</i>
Description	Develop comprehensive brand, marketing, and customer communications strategies that implements the strategic plan and creates operational efficiencies.
Phase	Priority 1: start in FY21-22 Q3 (Jan, Feb, Mar 2022)
Objectives	<ul style="list-style-type: none"> By 6.30.22: <ul style="list-style-type: none"> Identify, select, and implement tools to improve customer communication and feedback (e.g., chat/remote assistance, CRM/software tools, website, PLA Project Outcome). Complete a comprehensive branding strategy for the library that includes positioning, visual identity package, language and style guide, and staff rollout/training. By 12.31.22: Complete a comprehensive marketing strategy that identifies target audiences, messaging, communication channels, and frequency guidelines.
Measures	<ul style="list-style-type: none"> Marketing Plan <ul style="list-style-type: none"> Completion of tasks within allocated timeframes. Increased customer responsiveness to targeted communication channels and campaigns. Increased internal productivity related to marketing efforts. Brand Plan <ul style="list-style-type: none"> Completion of tasks within allocated timeframes. Increased internal productivity related to marketing efforts. eNewsletter <ul style="list-style-type: none"> Growth in the District's (12-month) Open Rate and Click Rates .
Budget	3-year total: \$35,000 (staff: \$0 + other implementation: \$35,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> Lack of funding and staff. Lack of cohesive style guide and brand strategy. Lack of understanding among staff about branding and marketing's role in the Library.
Ownership	Owner: Sarah/Steve. Assistant: Kathy/Tyler. Team: Anna, Betsy, Jimmy, Margie, Mike, Nancy, Rebecca, Sandy, Scott.

Service Strategy

Description	The Library provides robust, responsive, engaging customer experiences through both in-person and virtual channels inside and outside of its buildings. Services evolve over time based on customer feedback and community needs and wants. Staff engages with the community in targeted ways with the goal of building customer relationships that drive library use.
Outcome	A literate and engaged community that uses their library.

Service Strategy:

Overview

Item	Strategy 1 In-Person Services	Strategy 2 Virtual Services
Focused Work	<p style="text-align: center;">SS1: Enhance In-Building Experience SS2: Reinvent Online Experiences SS3: Focused Community Engagement</p>	
Description	<p>Develop two types of in-person services: one for in-building patrons and one for patrons engaging with us outside of our buildings.</p> <ul style="list-style-type: none"> • In-building focus: meeting patrons' wants/needs and delivering excellent customer service; providing self-service options. • Community engagement focus: getting direct feedback and sharing information about what the library offers in terms of collections, programs, services, and spaces. 	<p>Develop two types of virtual services: one for community engagement and one for digital collections:</p> <ul style="list-style-type: none"> • Community engagement focus: interactive with an array of targeted content and digital platforms including website, social media, and app. • Digital collection focus: providing material access--including eBooks, eAudiobooks, videos, and music--to those who "visit" the library on their devices.
Outcome and Promise	<p>People of all ages have fun, broaden their range of experiences, discover new things, and build relationships with staff, as desired.</p> <ul style="list-style-type: none"> • For in-building, relevant, well-organized, updated collections that meet community needs and interests; engaging, responsive programs; friendly, well-trained staff; accessible, adequate, welcoming spaces. • For community engagement, friendly, enthusiastic staff knowledgeable about library services and programs focused on listening to ideas and bringing library services outside of our buildings. 	<p>People of all ages have fun, broaden their range of virtual experiences, discover new things, and engage with the library, as desired.</p> <ul style="list-style-type: none"> • For website, social media and app, relevant and well-organized information; an engaged Library community; early presence on new platforms; and a voice with tone and messaging that's uniquely ours. • For digital collections, a relevant, updated, and appropriately sized collection that meets community needs and interests.
How We Define Success	<ul style="list-style-type: none"> • Increase in ongoing community feedback. • Increased responsiveness and sustained satisfaction scores on patron surveys. • Growth in users and collection use. 	<ul style="list-style-type: none"> • For website, social media, and app, use industry-standard analytics. • Growth in users and collection use.

Implementation:

SS1: Enhance In-Building Experience

Elements	Description
Description	Develop an in-person customer experience that prioritizes high-quality personalized interactions with staff, and enables customers to engage services on their own terms.
Phase	Priority 1: start in FY21-22 Q3 (Jan, Feb, Mar 2022)
Objectives	<ul style="list-style-type: none"> • By 3.31.22: Create and implement a feedback tool at all public service desks. • By 6.30.22: <ul style="list-style-type: none"> • Using customer feedback and usage statistics, establish an on-going process for evaluating and documenting recommendations that address service gaps. Items to evaluate include way-finding signage, service points, circulation, programs/event spaces, displays/merchandising, and furnishings/fixtures/equipment. • Review and update collection development policies and procedures. • By 9.30.22: Prepare and begin to implement a prioritized action plan for enhanced and new services that address gaps. • On-going: Provide input to and work with IS2. Facility Feasibility Plans.
Measures	<ul style="list-style-type: none"> • Implementation of feedback tools within allocated timeframes and increase in ongoing customer feedback. • Completion and implementation of action plan for enhanced and new services within allocated timeframes. • Implementation of evaluation criteria that tracks improvements in the Library's physical collections. • Completion of updated collection development policies and procedures within allocated timeframes.
Budget	3-year total: \$251,000 (staff: \$162,000 + other implementation: \$89,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> • Lack of funding and staff. • Lack of space in circulation workroom. • Current staff at and over work-load capacity. • Inefficient space layout, outdated physical shelving, and lack of space at Winnetka building. • Lack of space to expand collection or services at Northfield building. • Lack of programming feedback tool. • Lack of staff training on statistical analysis.
Ownership	Owner: Nick/Courtney. Assistant: Melissa. Team: Erin, Lisa, Natalie, Scott, Stephanie G.

Implementation:

SS2: Reinvent Online Experiences

<i>Elements</i>	<i>Description</i>
Description	Develop and implement a dynamic, integrated, and comprehensive digital presence including a new content rich website, social networking, a comprehensive library app, and e-resources.
Phase	Priority 2: start in FY21-22 Q4 (Apr, May, Jun 2022)
Objectives	<ul style="list-style-type: none"> • By 6.30.22: Complete a comprehensive digital strategy that includes the following elements: website, mobile app, social media channels, digital library card, and online content including e-resources, databases, and virtual/hybrid programs, among others. • Following completion of the digital strategy, complete an implementation plan for strategy elements as follows: <ul style="list-style-type: none"> • 9.30.22: Website, digital library card, and social media channels. • 12.31.22: Mobile app, e-resources, databases, and virtual/hybrid programs.
Measures	<ul style="list-style-type: none"> • Increased usage in digital collections and resources. • Increased website and app usage. • Increased social media engagement and followers on selected platforms.
Budget	3-year total: \$123,000 (staff: \$28,000 + other implementation: \$95,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> • Lack of funding and staff. • Homegrown platform that is inefficient and ineffective. • Database stats are inconsistent and difficult to access and track. • Lack of cohesive digital platform strategy and investment.
Ownership	Owner: Sarah./Mark. Assistant: Erin. Team: Ben, Kathy, Michael, Mike, Shannon.

Implementation:

SS3: Focused Community Engagement

Elements	Description
Description	Directly engage community members outside of the buildings in both formal and informal settings, including service delivery, community events, and partnerships.
Phase	Priority 3: start in FY22-23 Q1 (Jul, Aug, Sep 2022)
Objectives	<ul style="list-style-type: none"> By 9.30.22: <ul style="list-style-type: none"> Create an annual community events calendar that identifies at least three events in each community that the Library will attend annually. Create a standardized engagement kit for each location. Design and implement a pilot program for homebound delivery. Work with Park District Partners to identify ways of engaging with their members that support the Library's mission and strategic plan. Work with School District Partners to identify ways of engaging with students and teachers that support the Library's mission and strategic plan. By 12.31.22: work with other Community Partners (i.e., Chamber of Commerce, North Shore Senior Center, Book Stall, Winnetka Community House) to identify ways of engaging with their clients that support the Library's mission and strategic plan.
Measures	<ul style="list-style-type: none"> Completion of annual community events calendar within the allocated timeframes; presence at targeted number of events. Implementation of outreach kit for both locations within the allocated timeframes. Completion of homebound delivery pilot project within the allocated timeframes. Partnership plans and success measures in place with park districts, school districts, and other community partners within the allocated timeframes.
Budget	3-year total: \$108,000 (staff: \$108,000 + other implementation: \$0).
Obstacles & Dependencies	<ul style="list-style-type: none"> Lack of funding and staff. Lack of defined community engagement approach or plan. Lack of methodical process and mutual expectations for working with partners. Lack of administrative prioritization on partnership activities. Lack of cohesive community calendar.
Ownership	Owner: Sydney/Amanda. Assistant: Betsy/Stephanie G. Team: Amelia, Ben, Jim, Molly, Natalie, Pattie.

Organizational Strategy

Description	Evolve a culture of innovation and professional practices across the organization with staff mindsets and work methods focused on sustained excellence and continual process improvement. Develop staff capacity and capabilities by actively building on strengths, creating career pathways, and promoting learning opportunities to better meet new challenges.
Outcome	Self-motivated staff who embrace change, take risks, and proactively engage in ongoing learning in an effort to deliver high-level customer services.

Organizational Strategy:

Overview

Item	Strategy 1 Growing Leaders	Strategy 2 Innovation Culture	Strategy 3 Best Practices
Focused Work	OS1: Productivity Tools OS2: Staff Development Tools OS3: Innovation Tools		
Description	Develop staff capacity and capabilities to support Library investments and initiatives by actively: <ul style="list-style-type: none"> • Building on individual staff strengths. • Pursuing personal career objectives. • Learning new skills to meet new challenges. 	Evolve a culture of innovation and design thinking that leads to new service delivery and internal process improvements.	<ul style="list-style-type: none"> • Utilize library industry best practices to improve professional practices. • Utilize private sector concepts to improve existing front-end and back-of-house workflows and work processes.
Outcome and Promise	Self-motivated, evolving, and resilient staff who: <ul style="list-style-type: none"> • Embrace change to support Library investments and initiatives. • Actively engage in career development. • Seek new challenges and skills. • Apply professional strengths to new challenges. An organization that provides staff with career development opportunities, resources, and training.	Services aligned with evolving community needs and interests. Staff is: <ul style="list-style-type: none"> • Open to ideas • Adopts a learning-based "fail-fast" mindset • Actively pursues design thinking • Moves from a scarcity to an abundance mentality. 	<ul style="list-style-type: none"> • Organization: invest in resources that standardize general and departmental processes and procedures and that result in well trained, prepared, and knowledge staff, in order to reduce behind-the-scenes staff time and convert it to direct customer service. • Staff: actively seek and engage in work process improvements and increase personal productivity.
How We Define Success	<ul style="list-style-type: none"> • Career pathways are discussed on a quarterly/annual basis. • Individual staff are well prepared to deal with changing conditions and move into new roles. • Bench of strength for internal promotions. • Sustained staff engagement. • Lower controllable turnover. 	Develop metrics for: <ul style="list-style-type: none"> • Learning from failure • Risk seeking behavior • Front-running trends • Identifying customer and community needs 	Develop metrics for: <ul style="list-style-type: none"> • Process time savings and productivity improvements including converted time to customer services. • Staff confidence in training, confidence, and knowledge. • High praise customer feedback.

Initiative Implementation:

OS1: Productivity Tools

<i>Elements</i>	<i>Description</i>
Description	Develop staff-supporting workplace tools that continually improve back-end work processes, promote communications, and maintain updated policies and procedures.
Phase	Priority 1: start in FY21-22 Q3 (Jan, Feb, Mar 2022)
Objectives	<p>Establish the following on-going processes:</p> <ul style="list-style-type: none"> • By 3.31.22: Analyze department workflows and processes and modify them to implement "lean" principles. • By 6.30.22: Identify, select, and implement project management software. • By 9.30.22: <ul style="list-style-type: none"> • Streamline and standardize existing communications systems across the organization. • Establish a schedule to review and update policies and procedures and a process for updating staff.
Measures	<ul style="list-style-type: none"> • Improvements in back-of-house workflows and processes. • Implementation of project management software within allocated timeframes. • Implementation of quarterly staff communication surveys by 9.30.22. • Implementation of review schedule and sign-off method for all policy and procedure updates within allocated timeframe.
Budget	3-year total: \$9,000 (staff: \$0 + other implementation: \$9,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> • Lack of funding and staff. • Shift staff mindset from crisis control to advance planning and execution. • Lack of staff awareness of project management methodologies and how they'll improve workflows and processes. • Lack of standardized internal communications platform.
Ownership	Owner: Mark. Assistant: Stephanie GD. Team: Amelia, Anna, Jill, Mark.

Initiative Implementation:

OS2: Staff Development Tools

<i>Elements</i>	<i>Description</i>
Description	Produce highly engaged team by aligning individual skills to organizational objectives, providing career paths, and promoting internal talent.
Phase	Priority 2: start in FY21-22 Q4 (Apr, May, Jun 2022)
Objectives	<ul style="list-style-type: none"> By 6.30.22: <ul style="list-style-type: none"> Create and implement a comprehensive onboarding and training checklist for all new staff members. For each staff member, create professional development plan that aligns to applicable strategic objectives. By 9.30.22: <ul style="list-style-type: none"> Create career path roadmap for all positions in each department. Provide tools including coaching, continuing education, and networking opportunities to achieve career path objectives.
Measures	<ul style="list-style-type: none"> Implementation of on-boarding and training checklists within allocated timeframes. Implementation of 90-day post-hire new staff survey. Implementation of revised professional development plans and career roadmaps for all staff within the allocated timeframes. Creation and launch of resource list to support career pathways within the allocated timeframes. Implementation of annual staff engagement survey in May of each year.
Budget	3-year total: \$17,000 (staff: \$0 + other implementation: \$17,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> Lack of funding and staff. Residual lack of focus on career path development and continuing education. Mindset shift to engaged workplace culture. Lack of onboarding and training procedures.
Ownership	Owner: Courtney/Nick. Assistant: Brandon. Team: Amber, Jim, Melissa, Sandy.

Initiative Implementation:

OS3: Innovation Tools

<i>Elements</i>	<i>Description</i>
Description	Develop and implement innovation tools in which staff seek new challenges and develop new skills; use design-thinking to encourage creativity; adopt a “fail-fast” mindset to learn from any experience; and a pilot-project approach to stress test new ideas.
Phase	Priority 3: start in FY22-23 Q1 (Jul, Aug, Sep 2022)
Objectives	<ul style="list-style-type: none"> • By 9.30.22: <ul style="list-style-type: none"> • Train library staff on selected project management software and methodologies. • Train three to five staff in design-thinking methodologies and use train-the-trainer model for district-wide rollout to remaining staff. • By 12.31.22: <ul style="list-style-type: none"> • Design and implement an emerging trends discussion group for all staff. • Design and implement a rapid prototyping model to test and roll out new and enhanced services.
Measures	<ul style="list-style-type: none"> • Implement "Idea-to-Implementation Model" for vetting new ideas within allocated timeframes. • Complete rollout of one pilot project each for in-building services, online services, and community engagement services by 12.31.22.
Budget	3-year total: \$10,000 (staff: \$0 + other implementation: \$10,000).
Obstacles & Dependencies	<ul style="list-style-type: none"> • Lack of funding and staff. • Mindset shift to customer/community-driven service initiatives. • Service development process shift to design thinking methodologies. • Mindset shift to failure as a learning opportunity.
Ownership	Owner: Steve. Assistant: Maddy. Team: Brandon, Mark, Michael, Shannon.

Phasing and Budget

Institutional Strategy

	Priority	FY21-22		FY22-23				FY23-24				FY24-25				FY25-26			
		Q3	Q4	Q1	Q2	Q3	Q4												
		Jan Feb Mar	Apr May Jun	Jul Aug Sep	Oct Nov Dec	Jan Feb Mar	Apr May Jun												
IS1. Align Key Elements	1	L	R	W	W	W		OG/ DR		OG/ DR			OG/ DR		OG/ DR		OG/ DR		OG/ DR
IS2. Facilities Feasibility Plans	2		L	R	W	W	W		OG/DR										
IS3. Rebrand and Marketing Plans	1	L	R	W	W	W		OG/ DR		OG/ DR			OG/ DR		OG/ DR		OG/ DR		OG/ DR

Service Strategy

	Priority	FY21-22		FY22-23				FY23-24				FY24-25				FY25-26			
		Q3	Q4	Q1	Q2	Q3	Q4												
		Jan Feb Mar	Apr May Jun	Jul Aug Sep	Oct Nov Dec	Jan Feb Mar	Apr May Jun												
SS1. Enhance In-Building Experience	1	L	R	W	W	W		OG/ DR											
SS2. Reinvent Online Experiences	2		L	R	W	W	W		OG/DR										
SS3. Focused Community Engagement	3			L	R	W	W	W		OG/ DR			OG/ DR		OG/ DR		OG/ DR		OG/ DR

Organizational Strategy

	Priority	FY21-22		FY22-23				FY23-24				FY24-25				FY25-26			
		Q3	Q4	Q1	Q2	Q3	Q4												
		Jan Feb Mar	Apr May Jun	Jul Aug Sep	Oct Nov Dec	Jan Feb Mar	Apr May Jun												
OS1. Productivity Tools	1	L	R	W	W	W		OG/ DR		OG/ DR			OG/ DR		OG/ DR		OG/ DR		OG/ DR
OS2. Staff Development Tools	2		L	R	W	W	W		OG/DR										
OS3. Innovation Tools	3			L	R	W	W	W		OG/ DR			OG/ DR		OG/ DR		OG/ DR		OG/ DR

Key Map

Definitions

Launch (L)	Launch: period to prepare, procure things, test/stress test, refine, and launch.
Rollout (R)	Rollout: period to quickly adjust to feedback and scale.
Workout (W)	Workout: period to mature and evolve into stability.
Ongoing (OG/DR)	OnGoing and Decision Review: review each initiative for a decision of continue or sunset. If continue, what changes need to be made to maintain performance or if under performing, to meet intended metrics.

Fiscal Year	Investments		Total	Share
	Staff	Other Implementation		
FY21-22	\$90,000	\$155,000	\$245,000	38%
FY22-23	\$135,000	\$75,000	\$210,000	32%
FY23-24	\$135,000	\$60,000	\$195,000	30%
Total	\$360,000	\$290,000	\$650,000	100%

Strategic budget assumptions:

- 3-year strategic budget.
- “Staff” assumes: 2-full time librarians, 2-library assistants at 25 hours each, 3-specialists at 25 hours each, and realignment of some existing staff.
- “Other Implementation” assumes: consultants, software, professional development, rapid prototyping, hardware, e-resources, and materials/programs.
- The strategic budget only includes the first year within which staff would be hired or a cost would be incurred; beyond that, any recurring costs would be absorbed into the operating budget.
- Director will confirm strategic budget as part of the annual budget approval process.
- The cost of new services and related investments (e.g., staff time and support) that result from the idea-to-implementation process is not currently known.
- The strategic budget does not include capital improvements.

