

Introduction

The Winnetka-Northfield Public Library District (WNPLD) provides library services to all residents of Winnetka and Northfield, IL.

Strategic planning is the systematic process of envisioning a desired future, and translating that vision into broadly defined goals and a sequence of steps to achieve them.

This strategic plan should be used as a roadmap for meaningful change. The ultimate goal of the plan is for the library to be a modern, thriving, essential part of the Winnetka-Northfield community.

Background

The library last completed a full strategic planning process in 2011, which created a plan for 2011-2015.

Donna E. Fletcher Consulting, Inc., a professional strategic planning facilitator, was hired to help develop the new plan. Ms. Fletcher specializes in creating data-based strategic plans for libraries. The planning process was kicked off in February 2015, and this plan was officially approved by the library board in November 2015. It will be effective from January 2016 through December 2019.

Approach to Planning

To ensure a thorough and positive planning experience, the library engaged in a collaborative, in-depth data gathering process with the community, library board, and library staff. These activities included:

- An online community survey to determine the community's usage and perceptions of the library and its interest in potential new services. The completed survey sample was 1,259 residents (97% patrons, 3% non-users) and approximately 19% of WNPLD households.
- A review of 2009-2013 U.S. Census American Community Survey 5-Year Estimates for demographics.
- Community Stakeholder telephone interviews to identify community needs, and ideas for how the library might meet these needs.
- Staff subcommittee meetings to discuss and share ideas, potential activities, and targets for the strategic plan.

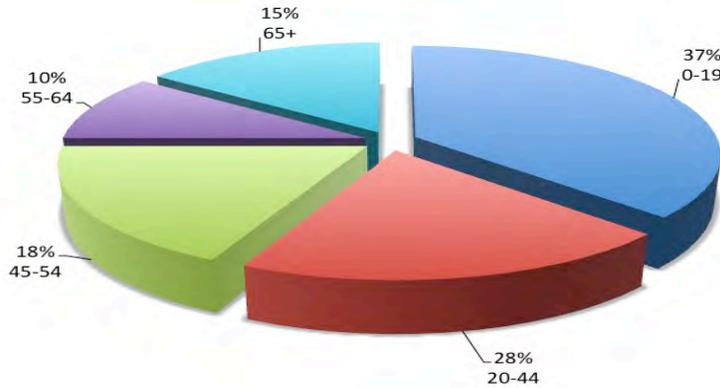
Community Profile*

Total population in the WNPLD as measured by the U.S. Census Bureau decreased slightly from 17,788 in 2000 to 17,434 (-2%). The current population is estimated in Winnetka as 12,273 and in Northfield as 5,161.

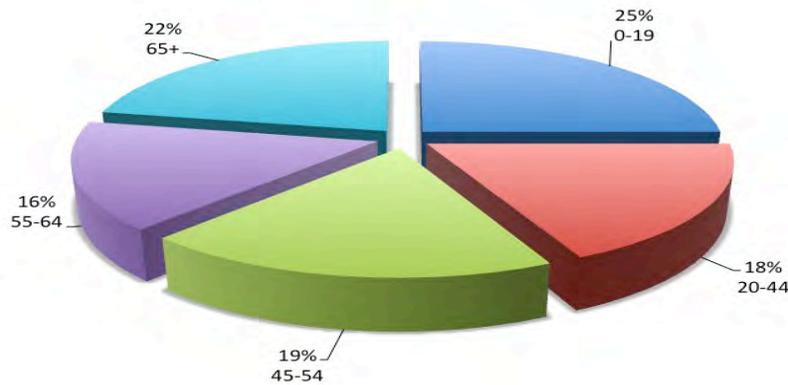
Demographics of Residents

- The median age of district residents is 41.8 years for Winnetka and 49.1 for Northfield. The age distribution shows some changes: Winnetka median age is 41.8 vs. 39.8 in 2000; Northfield is 49.1 vs. 44.4 in 2000.

Winnetka Residents by Age



Northfield Residents by Age



- 37% of Winnetka households have one or more children under the age of 19. In Northfield, 25% of households have children.
- Residents are highly educated: 88% of Winnetka, and 75% of Northfield residents have a bachelor's degree or higher.
- Residents are primarily Caucasian: 92% in Winnetka, 91% in Northfield. The Asian population is 4% in Winnetka, and 7% in Northfield.

* The data used for the community profile are 2013 estimates from the 2009-2013 American Community Survey 5-Year Estimates.

Assessment of the Library

The community survey indicates that the majority of patrons are satisfied with the library: 73% reported that they were entirely satisfied. Usage of the libraries is strong: average number of visits to the library is 34 per year.

The most used services are:

- Traditional adult materials: printed books, DVDS
- Assistance from a librarian
- The library's website
- Children's services

eMaterials are used less: only 31% of visitors who responded to the survey have downloaded eMaterials through the library.

The most important library attractions include:

- Popular and life-long learning materials
- Children's materials, programs and space
- Comfortable, quiet areas in the library
- Digital materials

Patrons show high interest in new, innovative services such as The Studio and programs for children under age 9 (enhanced hands-on and enhanced technology materials and programs).

Stakeholders also support the library's direction over the past two years, particularly The Studio and new programs that create an innovative culture in the library. They expressed the need for the library to continue and expand partnerships and collaborations (e.g. the schools, Park District, and The Alliance for Early Childhood).

Budget and Revenue

The library's fiscal year runs from July 1 through June 30. The FY2015 – 2016 budgeted operating expenses are \$3,218,034. Local property taxes account for approximately 96% of the budget. The balance comes from grants, gifts (especially from the Friends of the Library), and income generated by fines, copy machines, and bank interest.

Although overwhelmingly dependent on local property taxes for its fiscal well-being, the library is responsible for only a small percentage of residents' annual property tax bills.

Mission Statement

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.

Core Values

Core values define the culture and character of the library, and guide how we behave and make decisions.

- Personal service

- Innovation in all areas including collections, services, spaces, and programs.
- Spaces that are appealing, inviting, and comfortable
- Intellectual freedom
- Continuous staff development
- Fiscal responsibility and integrity

Initiatives, Goals, Activities, and Targets

The service initiatives, goals, activities, and targets are the outcome of the data-gathering process, and comprise the core of the strategic plan.

Service Initiatives

The service initiatives guide our actions in allocating financial resources and staff time. They do not eliminate efforts in other areas, but they receive the most focused attention of all the activities we undertake for the next four years. These initiatives are based on the data gathered through the community survey, stakeholder interviews, Board input, and staff input sessions.

- A. Marketing and Outreach
- B. Core Products
- C. The Customer Experience
- D. Organizational Competencies

Goals

Goals are designed to focus on what the community receives, and not on the resources the library needs to deliver the service. Goals include the identity of the target user, and how that user will benefit from the services identified.

Potential Activities

Potential activities are meant to illustrate possible actions the library will complete in order to meet the goals of the plan. These potential activities are not intended to be absolute or inclusive, but rather realistic suggestions that reflect the current library environment. As the environment changes, and more information is discovered during the research phase of each activity, changes are possible. The aim of the activities is to meet the identified goals.

Targets

Targets are the way the library will measure its progress toward reaching goals.

Service Initiative A: Marketing and Outreach

Goal A1: The District will build a brand and ongoing communication effort to maximize awareness of library resources, services, and programs. The District will also continue to raise awareness by increased community partnerships and providing services beyond our walls.

Potential Activities:

- a) Create a brand and ongoing communications to increase awareness of library resources, services, and programs.
- b) Develop a distinctive visual identity, including a new logo, and incorporate it consistently into signage and promotional materials.
- c) Select one library resource or service per quarter (aligning with “The Source” cycle) and focus marketing efforts on them. Promotion will happen at all points of service, and through all vehicles of communication.
- d) Increase community partnerships and off-site services and programs for adults and children to raise awareness of the library’s scope.
- e) Build feedback loops into library services to allow ongoing patron input, suggestions and viewpoints.

Targets:

- Patron usage and knowledge of resources and services:
 - Increase awareness of The Studio to 80%*, and increase visits to The Studio by 40% by January 2020.
 - See an increase of Adult program attendance of 10% by January 2020.
- Increase patron satisfaction across the District from 73%* to 80% by January 2020.

* 2015 Winnetka-Northfield Public Library Survey.

Service Initiative B: Core Products

Goal B1: Enhance our patrons' ability to find the materials they want, when they want, both in the library building and virtually.

Potential Activities:

- a) Reduce holds-to-purchase ratio of physical and digital materials.
- b) Establish consistent collection standards, including the physical processing and circulation rules across the district.
- c) Improve the catalog, including clearer terminology for item status, location, and item type.
- d) Implement EDI (electronic data interchange) ordering, which would provide real-time tracking of orders, budget status, duplicate checks, and other core collection development functions.
- e) Establish consistent collection standards for the removal and/or replacement of materials that are considered "dead" or "grubby."
- f) Evaluate the current ILS (integrated library system) to see if there are more relevant and cost-effective ways to deliver resources to our patrons, including the evaluation of patron access to information through the catalog.

Targets:

- Increase patron satisfaction with the physical and virtual material collections as measured by increased overall circulation of 4%.
- Have and maintain a threshold of no more the 10% of the collection being "dead" or "grubby" throughout the District.**
- Increase usage of eMaterials from 31%* to 36% by January 2020.

* 2015 Winnetka-Northfield Public Library Survey.

** Dead materials are those that have not circulated over a two- to three-year period, evaluated by Collection HQ. Grubby materials are those materials that have typically circulated over 25 times (sometimes fewer than 25, depending on the collection.) These items are evaluated for wear and tear and replaced based on demand.

Service Initiative C: The Customer Experience

Goal C1: Patrons will find a customer-focused environment with inviting physical spaces and a welcoming and helpful service experience.

Potential Activities:

- a) Develop a space utilization plan to maximize flexibility and accommodate new technology, personal reading space, groups, and programs/events.
- b) Develop, test, and refine retail merchandising techniques to showcase collections, increase circulation, and increase space for other purposes.
- c) Increase convenience through adapted hours, borrowing policies, staff expertise, one-on-one assistance, and improved access to services and materials.
- d) Develop new experience-based programs for all ages.

Targets:

- Patrons associating “forward thinking/innovative” with the library will rise from 37%* to 45% by 2020.
- Patrons associating “comfortable” with the library will increase from 65%* to 75% by 2020.

* 2015 Winnetka-Northfield Public Library Survey.

Organizational Competencies

The District will build organizational competencies to provide the desired services articulated in the goals, to increase the library's effectiveness and build a more collaborative team environment.

Our goal is to recruit, retain, and support quality employees throughout the District. Several organizational competencies were selected for inclusion in the plan based on the strategic goals identified and management's understanding of the current library environment.

Organizational Structure

1. The District will establish and maintain an organizational structure that supports its service priorities.
 - a. By November 30, 2016, review the organizational structure and revise to support the goals and objectives as identified in the strategic plan.
 - b. By December 30, 2016, revise all job descriptions so that they accurately reflect the knowledge, skills, abilities, and representative job duties of each position.

Training and Staff Development

1. The District will recruit, hire, train, and deploy staff that provides the highest quality customer service for all library users.
 - a. By April 30, 2016, create a Staff Development Plan that identifies the training that will be needed to support the goals in the strategic plan.
 - b. By June 30, 2016, implement a New Employee Orientation program.

Evaluation Process

This plan is designed to be flexible and responsive to changes in the economic, demographic or political climate. The strategic initiatives and goals are broad enough to allow for necessary modifications to the activities that are carried out. All of the activities are defined as “potential” in order to allow changes to the plan as needed. Library management will work closely with the Board of Trustees prior to finalizing and implementing all activities over the next four years.

Reporting progress toward meeting the goals and targets should be a regular part of library board meetings.