# Presentation to the
# Library Board of Trustees

# Proposed Strategic Plan

**CIVIC**Technologies

Marc Futterman

Version: November 4, 2021

**LOOKING** *to the* **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

# 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.
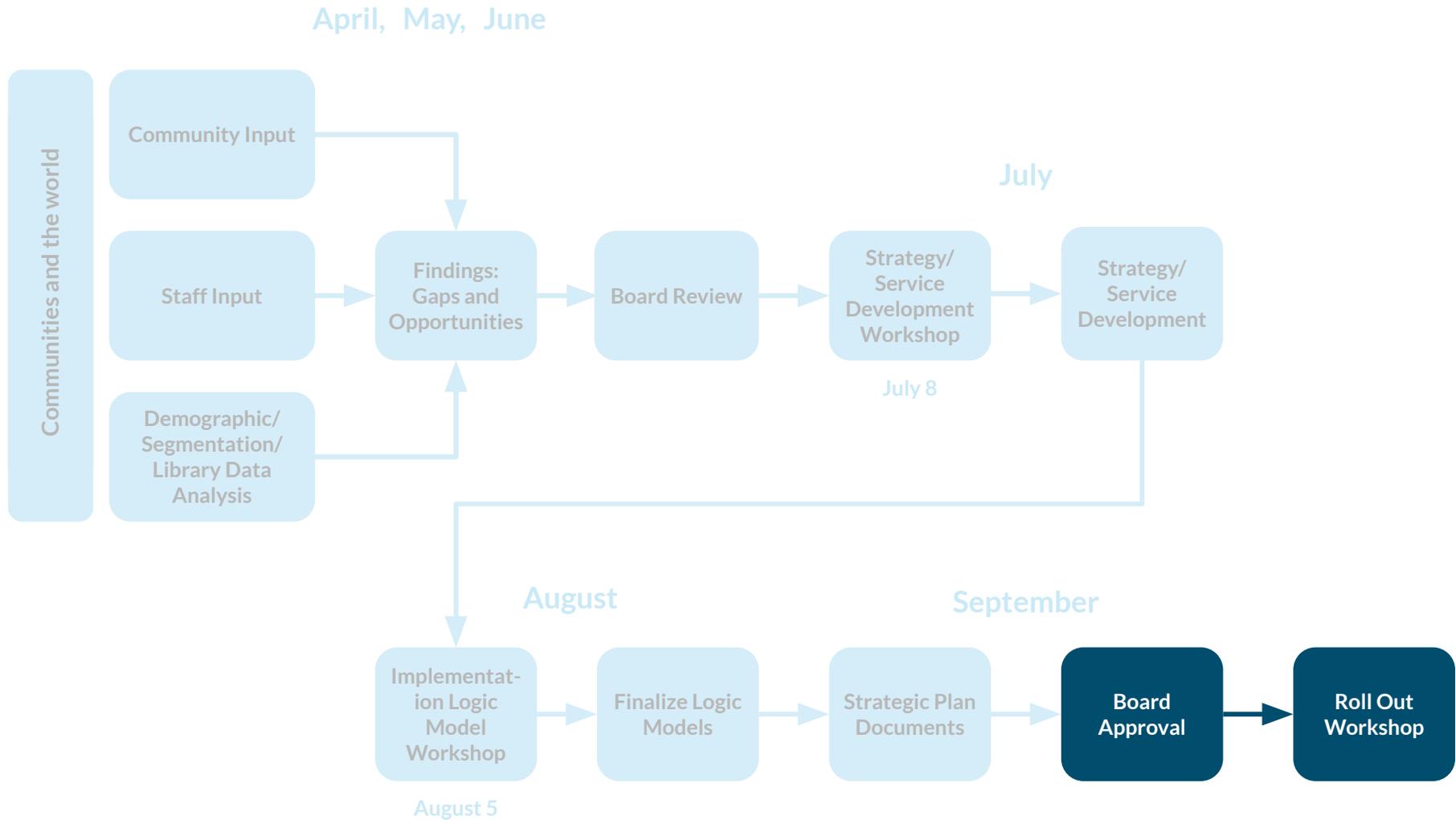
Engaged all staff in multiple interactive workshops and communication channels.

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.

LOOKING to the FUTURE
Winnetka-Northfield Public Library District's 2021 Strategic Plan

**April, May, June**

**July**

Communities and the world

- Community Input
- Staff Input
- Demographic/ Segmentation/ Library Data Analysis

→ Findings: Gaps and Opportunities → Board Review → Strategy/ Service Development Workshop — **July 8** → Strategy/ Service Development

**August**

**September**

- Implementation Logic Model Workshop — **August 5** → Finalize Logic Models → Strategic Plan Documents → **Board Approval** → **Roll Out Workshop**
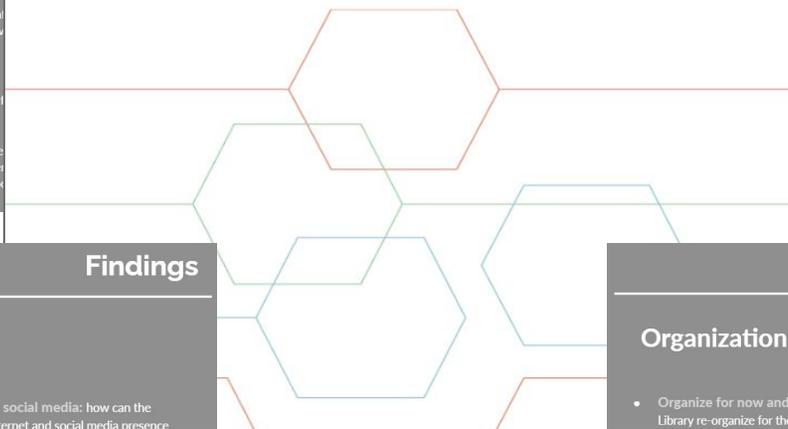
## Findings

### Overview

- **Staff/customer symbiosis:** there is a tremendous feeling of goodwill between Library [...] Library provides excellent customer service or that customers appreciate Library staff are [...] proportion. This symbiosis is the cornerstone of the Library's position in the community an[...] Library staff.

- **The Library's evolving culture:** the Library has moved from very challenging, negative [...] leadership. The organization's culture is at a pivot point. It's formative on the one hand an[...]

  - **Being formative** means:

    - That there is openness and a positive mindset on the part of most all sta[...] There seems to be an open mindedness, and behavioral willingness to ev[...]

  - **Being stuck** means two things:

    - The Library needs a model and method to manage change, and a model f[...] organization can measure where they are on a change continuum.

    - The few individuals stuck in the trauma of the recent past should be offe[...] cannot retard the progress of the Library as a whole. Active workplace e[...] change and investment, and setting positive expectations are forward loo[...] workplace environment.

---

## Findings

### Services

- [...]er relationships and service [...] the Library improve both [...] back-end work processes, build staff [...] in staff-supporting technology that [...]tomer satisfaction?

- [...]ce model: how can the Library [...]eakness including the Library's website [...]gital and virtual service/integration, [...]areness of services, innovation/risk [...]cesses, community [...]es, and the ability to change/update [...]s/procedures?

- [...]s for teens: how can the Library [...] up to the level of other segments [...] teen spaces and resources, better [...] quiet study rooms and reading areas, [...] and charging stations?

- [...]hance "core" (traditional) [...] the Library maintain and enhance core [...]es while reaching out in new areas?

### Board

- **Move forward:** how can the Library Board move forward with the Library to implement the strategic plan including deploying financial resources to expand and improve customer-driven services?

- **Professionalize:** how can the Library Board enhance its knowledge of library industry best practices, improve onboarding for new Trustees, renew focus on the role of the Board, and respect operational boundaries with the Library's professional staff?

---

## Gaps and Opportunities Memo

Winnetka-Northfield Public Library District

**Gaps and Opportunities Memo**

---

## Findings

### Community and Marketplace

- **Bridge community differences:** how can the Library help bridge cultural and other differences between the two communities it serves; and, have a meaningful point of view and voice in important community issues?

- **Change with a changing community:** how can the Library change with a changing community including population turnover and demographic change; welcome and orient new people and families to the community; and, support a new generation of leadership including volunteerism?

- **Actively support the community:** how can the Library actively support key community characteristics such as family life that values learning, reading, and education; access to the latest technology and savvy to use it; out of school education and learning for children and adults; environmental sustainability; evolution of downtown areas; and, growth in diversity of housing types to keep aging people in the community and increase income diversity?

- **Connect through social media:** how can the Library evolve an internet and social media presence that appro[...] throughou[...]

- **Advance[...]** advance p[...] leverage c[...]

- **Leverage** [...] leverage i[...] communi[...]

- **Preserve** [...] can the Li[...] base in lig[...] substantia[...]

- **Grow fac[...]** expand its[...] communi[...] needs?

---

## Findings

### Organization

- **Organize for now and the future:** how can the Library re-organize for the future instead of maintaining [...]ational structure from the pre-digital

- [...]ity differences as an organization: [...]y be one District in light of two

- [...]hange: how can the Library foster, and [...]pactively contribute to an organizational [...]one wants to work in?

- [...] while enhancing traditional [...]n the Library invest in a comprehensive [...]t includes state of the art website and [...]pand reach and services?

- [...]mindshare: how can the Library win [...]re through an identity and brand [...] spoken, written, and visual language, [...]keting, communications, website, and

- **Expand to expand:** how can the Library expand its reach and delivery to existing and new customers by expanding its staff?

- **Change for impact:** how can the Library manage the process of change in order to deliver more effective services?

- **Embed employee survey recommendations:** how can the Library sustainably embed employee survey recommendations such as building better administration-staff relationships; library-wide, cross-departmental, and interdepartmental communications; transparency; decision-making participation; employee appreciation; and individual career development pathways?

- **Impactful use of capital reserve funds:** how can the Library best deploy capital reserve funds to expand services and staff capacity, eliminating staff's semi-scarcity mentality?

---

## Findings
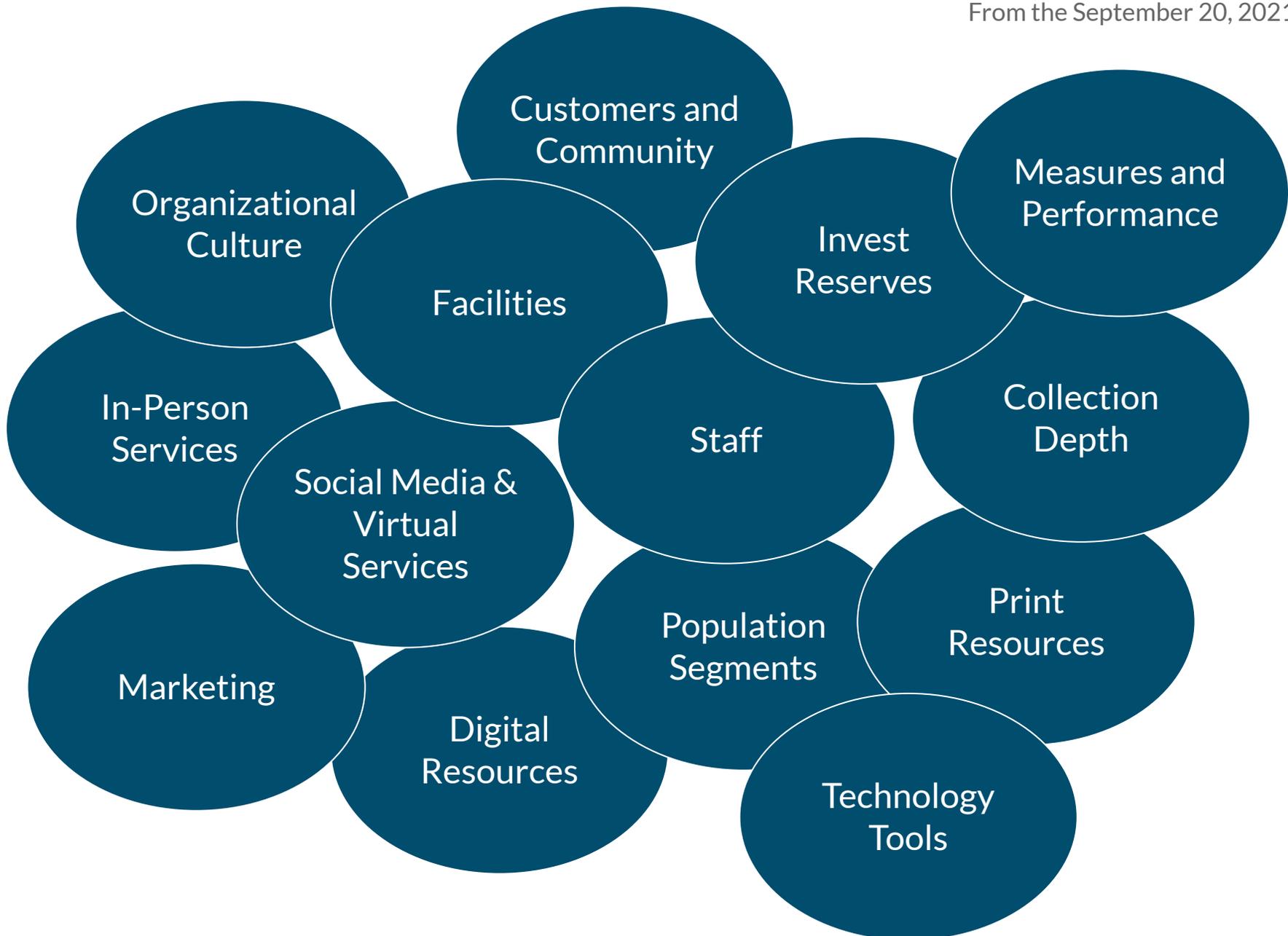
### Organization (continued)

- **Measure impact:** how can the Library apply performance measures across all dimensions including services, the organization itself, staff, customer relationships, and budget?

- **Systematically fail-fast work processes:** how can the Library systematically develop and engage in work processes that support innovation that delivers the next generation of customer services?

- **Engage the community in the community:** how can the Library engage the community outside of its branches?
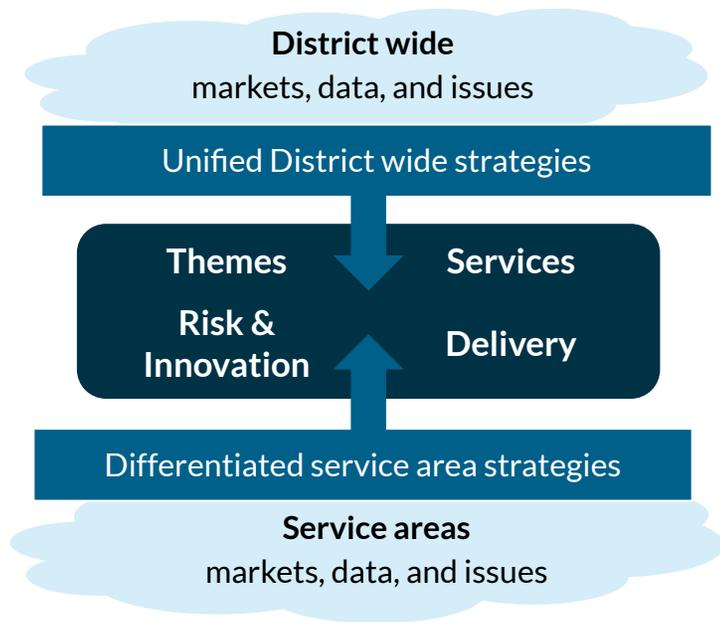
### Staff

- **Build on strengths and change:** how can individual Library staff grow professionally by building on their strengths and adopting/adapting new work skills to support the organization's vision, strategic plan, and service plan?

- **Engage career pathways:** how can individual Library staff proactively advance their own career objectives within the organization's vision, strategic plan, and service plan?

- **Adopt a fail-fast mindset:** how can Library staff adopt a fail-fast mindset that values failure as learning, values innovation while managing risk, values time as money, applies the concepts of opportunity costs, and utilizes project management tools?

- **Lead at all levels:** how can Library staff lead at all levels including owning solutions to problems they seek and observe, and have confidence that they'll be supported by management/administration?

From the September 20, 2021 meeting

Customers and Community
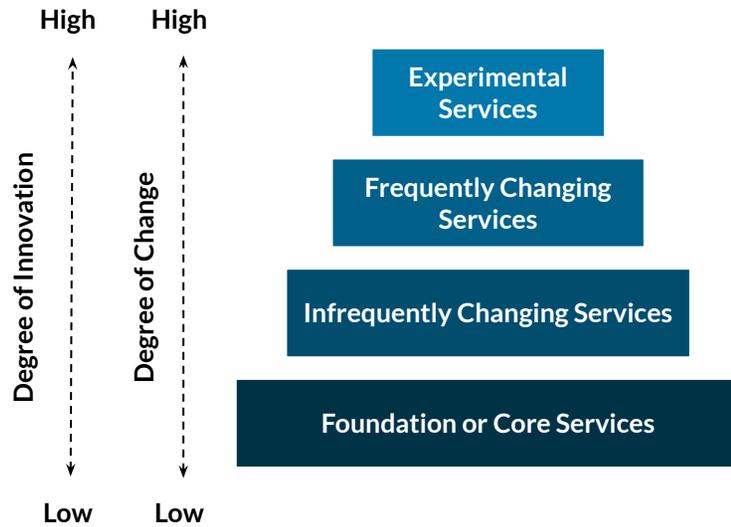
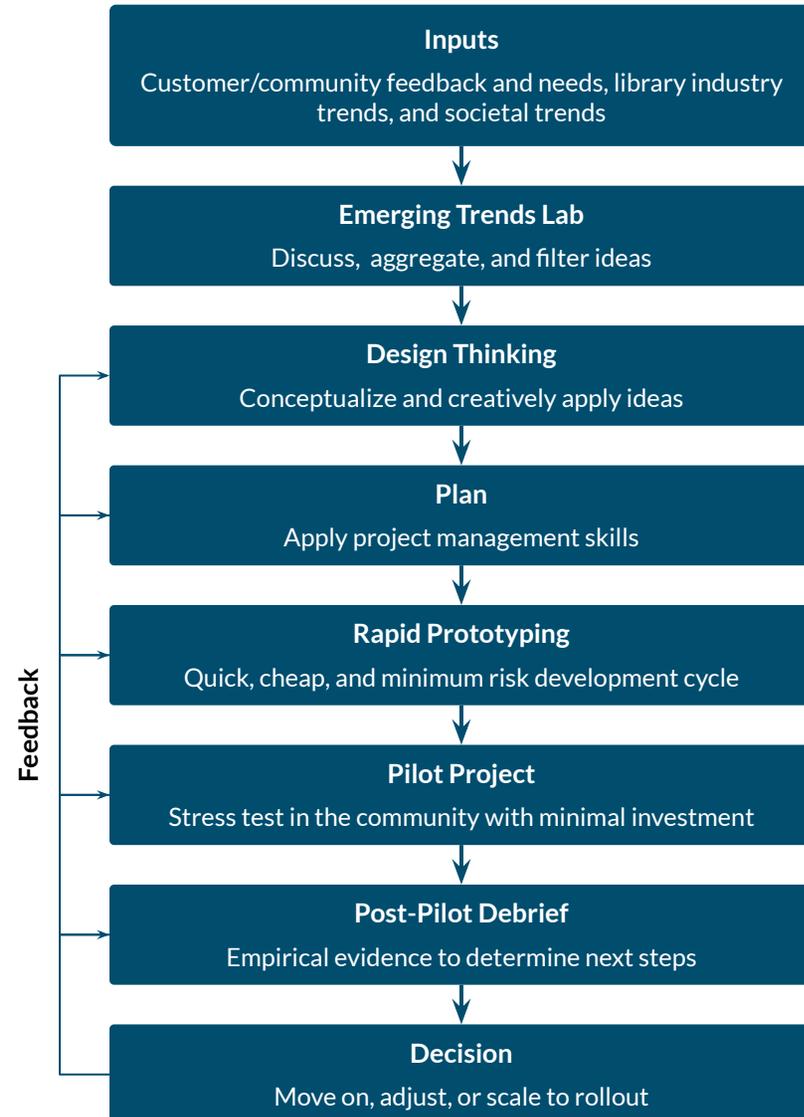Organizational Culture

Measures and Performance

Facilities

Invest Reserves

In-Person Services

Staff

Collection Depth

Social Media & Virtual Services

Marketing

Population Segments

Print Resources

Digital Resources

Technology Tools

**LOOKING** *to the* **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

## Top down/bottom up approach

**District wide**
markets, data, and issues

Unified District wide strategies

| Themes | Services |
|---|---|
| Risk & Innovation | Delivery |

Differentiated service area strategies

**Service areas**
markets, data, and issues

## Organizational & staff alignment model

**The Organization**

**Strategies, Investments, and Initiatives**

**Organizational Culture**
is designed to achieve a fully engaged workforce

The Library invests in productivity improvements, staff development, and innovation

The intent is to align individual staff to organizational objectives

**Strengths, skills, and talents**

**Career path plans**

**Annual performance reviews**

**Individual Staff Members**

## Risk and innovation model

High  High

Degree of Innovation

Degree of Change

**Experimental Services**

**Frequently Changing Services**

**Infrequently Changing Services**

**Foundation or Core Services**

Low  Low

## Idea-to-implementation model

**Inputs**
Customer/community feedback and needs, library industry trends, and societal trends

**Emerging Trends Lab**
Discuss, aggregate, and filter ideas

**Design Thinking**
Conceptualize and creatively apply ideas

**Plan**
Apply project management skills

**Rapid Prototyping**
Quick, cheap, and minimum risk development cycle

**Pilot Project**
Stress test in the community with minimal investment

**Post-Pilot Debrief**
Empirical evidence to determine next steps

**Decision**
Move on, adjust, or scale to rollout

Feedback

## Components of a customer & community-driven approach

**Apply community intelligence**

Use market segmentation to predict customer needs and measure service responses

**Respond to needs & interests**

Regularly scan and quickly adapt to changing circumstances

**CUSTOMER & COMMUNITY DRIVEN SERVICES**

Engage in ongoing dialog and be actively involved across many fronts

**Listen & engage**

Create a meaningful identity and make a public commitment to deliver

**Deliver on brand promise**

## Business approach to library services

- Services are not permanent.

- All services:

  - Are reviewed and updated annually.

  - Are performance based.

  - Must demonstrate customer or community need or interest.

  - Must include "hard-cost" and staff-time allocations.

- All new and enhanced services follow the idea-to-implementation model and are ranked on the risk and innovation model.

- All staff:

  - Utilize "cascading levels of leadership."

  - Apply project management skills including understandings of opportunity cost in time    and dollars.

**LOOKING** *to the* **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

## Board approves
Strategies, Investments & 3-Year Strategic Budget

## Director executes & manages
Initiatives and Implementation

### Strategies
- Description
- Outcome

### Investments
- Description
- Outcome & Promise
- How We Define Success

### Initiatives
- **Description**
- Phasing
- **Objectives**
- Measures
- **Budget**
- Obstacles & Dependencies
- Ownership & Team

### Implementation
- Action Plan & Schedule
- Partnerships
- Sunsetting

- Director retains flexibility and discretion to execute and manage implementation including making continuous updates and revisions, as needed.

- Logic model approach
  - Systematic
  - Customer segment- and market-driven
  - Business-like methods

- Implementation will occur through initiative teams, with each staff member assigned to two teams.

# Mission, Vision, Values

**LOOKING** *to the* **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

*Mission*

**Enrich community life through exploration, experiences, and connections.**

*Community Vision*

**One District, Two Communities**

*Customer Service Vision*

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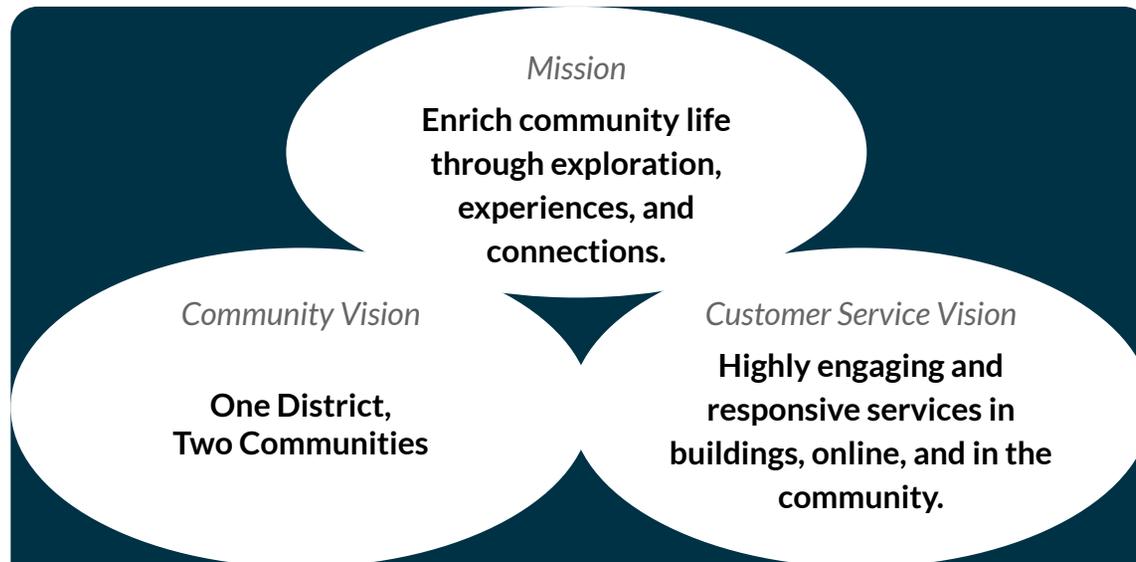
*Workplace Culture*

*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.

15

# Strategies, Investment, and Initiatives

**LOOKING** to the **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

## Service Strategy

Animating theme: **Enrich family life**

Investments:
| In-Person Services | Virtual Services |

Initiatives:
**Enhance In-Building Experience**
**Reinvent Online Experiences**
**Focused Community Engagement**

*Mission:*

**Enrich community life through exploration, experiences, and connections.**

*Library/Community Vision:*

**One District, Two Communities**

*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. |

**LOOKING** *to the* **FUTURE**
Winnetka-Northfield Public Library District's 2021 Strategic Plan

| Item | Investment 1 | Investment 2 | Investment 3 | Investment 4 |
|---|---|---|---|---|
| Investment | **Resource Alignment** | **Facilities Development** | **Brand Development** | **Customer Communications** |
| Initiative | **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 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. | 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 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. |

# IS1: Align Key Elements

| Elements | Description |
|---|---|
| Description | Functionally align staff, organization, and budget to implement the Strategic Plan. |
| Phase | Priority 1: start in FY21-22 Q2 (Oct, Nov, Dec 2021) |
| Objectives | By 12.31.21:<br>• Align existing staff positions to deliver in-building, online, community, and support services.<br>• Secure approval for a three-year spending plan that leverages operating budget and capital reserves to fund the implementation of the strategic plan.<br>• 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) |

# IS2: Facility Feasibility Plans

| Elements | Description |
|---|---|
| Description | Investigate short-term and long-term facility expansion, renovation, and utilization at both locations. |
| Phase | Priority 2: start in FY21-22 Q3 (Jan, Feb, Mar 2022) |
| Objectives | • By 3.31.22: Complete a short-term improvement feasibility study for each location to explore immediate needs such as space use, wayfinding, and customer flow, among others.<br>• By 6.30.22:<br> • Prepare a long-term expansion/revitalization study for each location.<br> • 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). |

# IS3: Rebrand and Marketing Plans

| Elements | Description |
|---|---|
| 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 | • By 6.30.22:<br>  • Identify, select, and implement tools to improve customer communication and feedback  (e.g., chat/remote assistance, CRM/software tools, website, PLA Project Outcome).<br>  • Complete a comprehensive branding strategy for the library that includes positioning, visual identity package, language and style guide, and staff rollout/training.<br>• By 9.30.22: Complete a comprehensive marketing strategy that identifies target audiences, messaging, communication channels, and frequency guidelines. |
| Measures | • Marketing Plan<br>  • Completion of tasks within allocated timeframes.<br>  • Increased customer responsiveness to targeted communication channels and campaigns.<br>  • Increased internal productivity related to marketing efforts.<br>• Brand Plan<br>  • Completion of tasks within allocated timeframes.<br>  • Increased internal productivity related to marketing efforts.<br>• eNewsletter<br>  • Growth in the District's (12-month) Open Rate and Click Rates. |
| Budget | 3-year total: $35,000 (staff: $0 + other implementation: $35,000). |

# 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. |

# Investments Overview

| Item | Investment 1 | Investment 2 |
|---|---|---|
| Investment | **In-Person Services** | **Virtual Services** |
| Initiative | **SS1: Enhance In-Building Experience      SS2: Reinvent Online Experiences      SS3: Focused Community Engagement** | |
| Description | Develop two types of in-person services: one for in-building patrons and one for patrons engaging with us outside of our buildings.<br><br>• In-building focus: meeting patrons' wants/needs and delivering excellent customer service; providing self-service options.<br>• Community engagement focus: getting direct feedback and sharing information about what the library offers in terms of collections, programs, services, and spaces. | Develop two types of virtual services: one for community engagement and one for digital collections:<br><br>• Community engagement focus: interactive with an array of targeted content and digital platforms including website, social media, and app.<br>• Digital collection focus: providing material access--including eBooks, eAudiobooks, videos, and music--to those who "visit" the library on their devices. |
| Outcome and Promise | People of all ages have fun, broaden their range of experiences, discover new things, and build relationships with staff, as desired.<br><br>• 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.<br>• 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. | People of all ages have fun, broaden their range of virtual experiences, discover new things, and engage with the library, as desired.<br><br>• 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.<br>• For digital collections, a relevant, updated, and appropriately sized collection that meets community needs and interests. |
| How We Define Success | • Increase in ongoing community feedback.<br>• Increased responsiveness and sustained satisfaction scores on patron surveys.<br>• Growth in users and collection use. | • For website, social media, and app, use industry-standard analytics.<br>• Growth in users and collection use. |

# 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 Q2 (Oct, Nov, Dec 2021) |
| Objectives | • By 12.31.21: Create and implement a feedback tool at all public service desks.<br>• By 3.31.22:<br>    • 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.<br>    • Review and update collection development policies and procedures.<br>• By 6.30.22: Prepare and begin to implement a prioritized action plan for enhanced and new services that address gaps.<br>• On-going: Provide input to and work with IS2. Facility Feasibility Plans. |
| Measures | • Implementation of feedback tools within allocated timeframes and increase in ongoing customer feedback.<br>• Completion and implementation of action plan for enhanced and new services within allocated timeframes.<br>• Implementation of evaluation criteria that tracks improvements in the Library's physical collections.<br>• Completion of updated collection development policies and procedures within allocated timeframes. |
| Budget | 3-year total: $251,000 (staff: $162,000 + other implementation: $89,000). |

# SS2: Reinvent Online Experiences

| Elements | Description |
|---|---|
| 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 Q3 (Jan, Feb, Mar 2022) |
| Objectives | • By 3.31.22: 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.<br>• Following completion of the digital strategy, complete an implementation plan for strategy elements as follows:<br>    • 6.30.22: Website, digital library card, and social media channels.<br>    • 9.30.22: Mobile app, e-resources, databases, and virtual/hybrid programs. |
| Measures | • Increased usage in digital collections and resources.<br>• Increased website and app usage.<br>• Increased social media engagement and followers on selected platforms. |
| Budget | 3-year total: $123,000 (staff: $28,000 + other implementation: $95,000). |

# 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 FY21-22 Q4 (Apr, May, Jun 2022) |
| Objectives | • By 6.30.22:<br>  • Create an annual community events calendar that identifies at least three events in each community that the Library will attend annually.<br>  • Create a standardized engagement kit for each location.<br>  • Design and implement a pilot program for homebound delivery.<br>  • Work with Park District Partners to identify ways of engaging with their members that support the Library's mission and strategic plan.<br>  • Work with School District Partners to identify ways of engaging with students and teachers that support the Library's mission and strategic plan.<br>• By 9.30.22: 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 | • Completion of annual community events calendar within the allocated timeframes; presence at targeted number of events.<br>• Implementation of outreach kit for both locations within the allocated timeframes.<br>• Completion of homebound delivery pilot project within the allocated timeframes.<br>• 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). |

# 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. |

# Investments Overview

| Item | Investment 1 | Investment 2 | Investment 3 |
|---|---|---|---|
| Investment | **Growing Leaders** | **Innovation Culture** | **Best Practices** |
| Initiative | **OS1: Productivity Tools** | **OS2: Staff Development Tools** | **OS3: Innovation Tools** |
| Description | Develop staff capacity and capabilities to support Library investments and initiatives by actively:<br>• Building on individual staff strengths.<br>• Pursuing personal career objectives.<br>• 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. | • Utilize library industry best practices to improve professional practices.<br>• 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:<br>• Embrace change to support Library investments and initiatives.<br>• Actively engage in career development.<br>• Seek new challenges and skills.<br>• Apply professional strengths to new challenges.<br>An organization that provides staff with career development opportunities, resources, and training. | Services aligned with evolving community needs and interests.<br>Staff is:<br>• Open to ideas<br>• Adopts a learning-based "fail-fast" mindset<br>• Actively pursues design thinking<br>• Moves from a scarcity to an abundance mentality. | • 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.<br>• Staff: actively seek and engage in work process improvements and increase personal productivity. |
| How We Define Success | • Career pathways are discussed on a quarterly/annual basis.<br>• Individual staff are well prepared to deal with changing conditions and move into new roles.<br>• Bench of strength for internal promotions.<br>• Sustained staff engagement.<br>• Lower controllable turnover. | Develop metrics for:<br>• Learning from failure<br>• Risk seeking behavior<br>• Front-running trends<br>• Identifying customer and community needs | Develop metrics for:<br>• Process time savings and productivity improvements including converted time to customer services.<br>• Staff confidence in training, confidence, and knowledge.<br>• High praise customer feedback. |

# OS1: Productivity Tools

| Elements | Description |
| --- | --- |
| 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 Q2 (Oct, Nov, Dec 2021) |
| Objectives | Establish the following on-going processes:<br>• By 12.31.21: Analyze department workflows and processes and modify them to implement "lean" principles.<br>• By 3.31.22: Identify, select, and implement project management software.<br>• By 6.30.22:<br>    • Streamline and standardize existing communications systems across the organization.<br>    • Establish a schedule to review and update policies and procedures and a process for updating staff. |
| Measures | • Improvements in back-of-house workflows and processes.<br>• Implementation of project management software within allocated timeframes.<br>• Implementation of quarterly staff communication surveys by 9.30.22.<br>• 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). |

# OS2: Staff Development Tools

| Elements | Description |
|---|---|
| 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 Q3 (Jan, Feb, Mar 2022) |
| Objectives | • By 3.31.22:<br>   • Create and implement a comprehensive onboarding and training checklist for all new staff members.<br>   • For each staff member, create professional development plan that aligns to applicable strategic objectives.<br>• By 6.30.22:<br>   • Create career path roadmap for all positions in each department.<br>   • Provide tools including coaching, continuing education, and networking opportunities to achieve career path objectives. |
| Measures | • Implementation of on-boarding and training checklists within allocated timeframes.<br>• Implementation of 90-day post-hire new staff survey.<br>• Implementation of revised professional development plans and career roadmaps for all staff within the allocated timeframes.<br>• Creation and launch of resource list to support career pathways within the allocated timeframes.<br>• Implementation of annual staff engagement survey in May of each year. |
| Budget | 3-year total: $17,000 (staff: $0 + other implementation: $17,000). |

# Initiative Implementation:

## OS3: Innovation Tools

| Elements | Description |
|---|---|
| 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 FY21-22 Q4 (Apr, May, Jun 2022) |
| Objectives | <ul><li>By 6.30.22:<ul><li>Train library staff on selected project management software and methodologies.</li><li>Train three to five staff in design-thinking methodologies and use train-the-trainer model for district-wide rollout to remaining staff.</li></ul></li><li>By 9.30.22:<ul><li>Design and implement an emerging trends discussion group for all staff.</li><li>Design and implement a rapid prototyping model to test and roll out new and enhanced services.</li></ul></li></ul> |
| Measures | <ul><li>Implement "Idea-to-Implementation Model" for vetting new ideas within allocated timeframes.</li><li>Complete rollout of one pilot project each for in-building services, online services, and community engagement services by 12.31.22.</li></ul> |
| Budget | 3-year total: $10,000 (staff: $0 + other implementation: $10,000). |

# Phasing, Budget, and Next Steps

LOOKING to the FUTURE
Winnetka-Northfield Public Library District's 2021 Strategic Plan

## Institutional Strategy

| Institutional Strategy | Priority | FY21-22 Q1 (Jul/Aug/Sep) | Q2 (Oct/Nov/Dec) | Q3 (Jan/Feb/Mar) | Q4 (Apr/May/Jun) | FY22-23 Q1 (Jul/Aug/Sep) | Q2 (Oct/Nov/Dec) | Q3 (Jan/Feb/Mar) | Q4 (Apr/May/Jun) | FY23-24 Q1 (Jul/Aug/Sep) | Q2 (Oct/Nov/Dec) | Q3 (Jan/Feb/Mar) | Q4 (Apr/May/Jun) | FY24-25 Q1 (Jul/Aug/Sep) | Q2 (Oct/Nov/Dec) | Q3 (Jan/Feb/Mar) | Q4 (Apr/May/Jun) | FY25-26 Q1 (Jul/Aug/Sep) | Q2 (Oct/Nov/Dec) | Q3 (Jan/Feb/Mar) | Q4 (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 | | OG/DR |
| IS2. Facilities Feasibility Plans | 2 | | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | 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 | | OG/DR |

## Service Strategy

| Service Strategy | Priority | FY21-22 Q1 | Q2 | Q3 | Q4 | FY22-23 Q1 | Q2 | Q3 | Q4 | FY23-24 Q1 | Q2 | Q3 | Q4 | FY24-25 Q1 | Q2 | Q3 | Q4 | FY25-26 Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| SS1. Enhance In-Building Experience | 1 | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR |
| SS2. Reinvent Online Experiences | 2 | | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | |
| SS3. Focused Community Engagement | 2 | | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | |

## Organizational Strategy

| Organizational Strategy | Priority | FY21-22 Q1 | Q2 | Q3 | Q4 | FY22-23 Q1 | Q2 | Q3 | Q4 | FY23-24 Q1 | Q2 | Q3 | Q4 | FY24-25 Q1 | Q2 | Q3 | Q4 | FY25-26 Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| OS1. Productivity Tools | 1 | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR |
| OS2. Staff Development Tools | 2 | | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | |
| OS3. Innovation Tools | 3 | | | | L | R | W | W | W | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR | | OG/DR |

### Key Map — Definitions

| 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. |

LOOKING to the FUTURE
Winnetka-Northfield Public Library District's 2021 Strategic Plan

| 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.

Finalize plan documentation.

Prepare rollout plan.

Finalize initiative implementation logic models including actions, detailed schedule, partnerships, and sunsetting.

Begin implementing initiatives per the phasing schedule.

Plan approval of:

- 3 strategies and their respective investments.

- 3-year strategic budget

  - Including Director flexibilty and discretion to execute and manage initiative implementation including continuous updates and revisions.

Thank you!



LOOKING *to the* FUTURE
Winnetka-Northfield Public Library District's 2021 Strategic Plan