

# WNPL Strategic Plan Initiatives

## June 2018 Quarterly Progress Report



### Strategic Themes

1. WNPL must continuously innovate in order to thrive and to deliver to the community what it wants and needs.
2. WNPL is committed to providing the highest level of service to our constantly evolving and diverse community.
3. We will take WNPL out to the community.

Guide to highlights: **Green = Complete**, **Blue = Partially Complete**, **Yellow = In Progress and/or Not Started**

| Project  | Owner          | Priority | Departments Impacted | Status / Timeline / Assessment   | Strategic Theme         | Funding Source | Complete?                   |
|--|----------------|----------|----------------------|--|-------------------------|----------------|-----------------------------|
| Create a fundraising board with a nominating committee     | Ryan Livergood | High     | Admin                | Target completion date: 4th quarter, 2017<br>Status: Complete<br>Assessment: Formation of WNPLD Development Council completed  | (1) Fundraising/revenue | N/A            | Yes                         |
| Establish projects with amounts for fundraising priorities | Ryan Livergood | High     | Admin                | Target completion date: Annually in the 3 <sup>rd</sup> quarter<br>Status: Two projects identified for 2018, front of library beautification and reimagining of computer lab. Will utilize annual appeal and fundraising projects surrounding our 45 <sup>th</sup> anniversary in 2018 to help fund both |                         |                | Yes for 2018, No for beyond |

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|  |                |        |       | projects.<br>Assessment: Executive Director reviews with WNPLD Development Council and Management Team   |  |  |                                  |
| Benchmark the current giving and set realistic giving goals for the next three years                 | Ryan Livergood | High   | Admin | Target completion date: 3rd quarter, 2018<br>Assessment: Executive Director is putting together a fundraising plan that will include benchmarks.   |  |  | No                               |
| Revamp the memorial and tribute giving program and include the dedication of books in the collection | Ryan Livergood | Medium | Admin | Target completion date: 4th quarter, 2018<br>Assessment: Procedures are established for these programs; brochure explaining these programs is available for the public   |  |  | No                               |
| Create a planned giving program  | Ryan Livergood | Medium | Admin | Target completion date: 4 <sup>th</sup> quarter, 2018<br>Assessment: Planning giving program is created and brochure explaining program is available for the public  |  |  | No                               |
| Research alternative revenue options   | Ryan Livergood | Medium | Admin | Target completion date: ongoing<br>Status: Informal discussions with members of the Management Team have taken place. Formal discussion will be done at Management Team retreat on April 18 in FY 2017-2018<br>Assessment: Executive Director examines and discusses viability of alternative revenue options quarterly with Management Team |  |  | Ongoing and part of our workflow |
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| Data-driven planning: make better use of data to plan programs and services; redesign program evaluation form  | Noreen Reese   | High | Admin, Adult Services, Youth Services | Target completion date: Ongoing<br>Status: In progress<br>Assessment: Annual review during budget process; We have updated program stats sheet to include resources used to develop and deliver program; plan to redesign program evaluation form after our review of outcome-based assessment is complete. This will be approved by the Deputy Director and Executive Director   | (1)<br>Organizational development |  | Ongoing and part of our workflow |
| Outcome-based assessment: conduct a trial of Project Outcome in Youth Services Department followed by an evaluation of its effectiveness and its applicability to the entire library   | Diana Sills    | High | Youth Services                        | Target Completion Date: 3 <sup>rd</sup> quarter 2018<br>Status: In progress, still in process of reviewing trial results with Head of Youth Services now with plan to discuss with Management Team in 3 <sup>rd</sup> quarter 2018.   |                                   |  | Ongoing                          |
| Succession planning and staff retention: cultivate leaders from within by identifying potential leaders and giving those individuals an opportunity to grow and to develop skills; examine reasons for staff turnover and develop a strategy for retaining staff | Ryan Livergood | High | All                                   | Target Completion: Ongoing, 4 <sup>th</sup> quarter 2018<br>Status: Implemented a process where Managers collaborate with Administration in identifying future organizational leaders; Staff engagement survey done by outside firm cost prohibitive. Will explore the possibility of doing this survey on our own in house.<br>Assessment: Executive Director and Deputy Director will annually identify members of staff that have leadership potential and do what they can to provide these individuals opportunities to develop their leadership skills; |                                   |  | Ongoing                          |

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|  |                               |      |     | completion and analysis of staff engagement survey   |                         |  |                                  |
| Staff development : invest in staff by encouraging and providing opportunities for staff development (e.g., training, conferences)   | Ryan Livergood                | High | All | Target Completion Date: ongoing<br>Status: Ongoing, managers are focusing on how to provide these opportunities with staff while staying within the means of the budget<br>Assessment: managers collect feedback from staff regarding staff development opportunities during annual review process; annually analyze the budget to ensure staff development is supported at adequate levels                  |                         |  | Ongoing and part of our workflow |
| Long-range staffing plan: analyze the library's existing and future staffing needs to determine whether staffing is balanced across departments and if any changes or additions are needed | Ryan Livergood                | High | All | Target Completion Date: ongoing<br>Status: Discussions occur during the budget prep process and when vacancies occur.<br>Assessment: Management Team conducts annual planning session during budget preparation process  |                         |  | Ongoing and part of our workflow |
| Examining the communication of policy and security-related matters from both security to staff and staff to security.  | Ryan Livergood, Eddie Kristan | High | All | Target completion date: ongoing<br>Status: Since staff development day in 2017, the Security Team presents reports at every All Staff meeting; Security Supervisor sends regular e-mails to all staff; Security Monitor regularly liaisons with Department Managers<br>Assessment: Executive Director will review quarterly with both the Security Monitor and Department Managers the effectiveness of this | (1) Safety and security |  | Ongoing and part of our workflow |

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|  |                               |      |          | communication   |  |  |             |
| Exploring the addition of a device or software for staff that work in public areas that can be used to alert security of problem issues or situations.               | Ryan Livergood, Eddie Kristan | High | All      | Target completion date: 3 <sup>rd</sup> quarter, 2018<br>Status: Security Monitor has researched and proposed hardware/software solutions to accomplish this action item. Executive Director will present to the Board as part of the FY 2018-19 budget prep process<br>Assessment: Successful implementation of device/software that can be used to alert security of problem issues or situations     |  |  | In progress |
| Taking steps to ensure bookmobile safety, such as adding a GPS device to the bookmobile and a sign for the outside that indicates no cash is on board.               | Kevin Getty, Angela Clarke    | High | Outreach | Target completion date: 3 <sup>rd</sup> quarter, 2018<br>Status: Identified solutions that will be implemented in the 3 <sup>rd</sup> quarter of 2018<br>Assessment: Additional of a device that can be used to track bookmobile along with a sign addition   |  |  | In progress |
| Retraining staff to make sure everyone is consistently enforcing policy and following the same safety procedures (i.e., unattended child policy, closing procedures) | Ryan Livergood                | High | All      | Target completion date: 3 <sup>rd</sup> quarter, 2018<br>Status: Informing staff about important policies and/or policy changes/additions at All Staff meetings; Roleplaying how policies apply in different situations with staff; Person-In-Charge (PIC) retraining; identifying key policies for staff or specific departments to review on a regular schedule which will be monitored via Paylocity |  |  | In progress |

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|   |                               |        |       | Assessment: annual acknowledgement from staff that they have reviewed and understand policies relevant to their position   |  |  |                                  |
| Explore creating new volunteer opportunities or programs at WNPL  | Noreen Reese                  | High   | All   | Target Completion Date: ongoing<br>Status: In progress.<br>Assessment: Executive Director will consult with Volunteer Coordinator and Management Team annually to discuss new volunteer opportunities; the Volunteer Coordinator will work with library departments to implement new volunteer opportunities and coordinate with the Head of Communications to promote these opportunities to the public | (1)<br>Volunteer development                           |  | Ongoing and part of our workflow |
| Increase awareness of volunteer opportunities at WNPL   | Noreen Reese                  | High   | Admin | Target Completion Date: ongoing<br>Status: We have started actively attending volunteer fairs to promote volunteer opportunities, in addition to promoting them on social media and in the <i>Inside Angle</i> when relevant<br>Assessment: review number of applications quarterly  |  |  | Ongoing and part of our workflow |
|   |                               |        |       |  |  |  |                                  |
| Use community partnerships to reach out to Latinos, African-Americans, and residents with limited or no English | Ryan Livergood / Noreen Reese | Medium | Admin | Target Completion Date: ongoing<br>Status: In the process of documenting the relationships that individual staff have with community partners in one place so we can clearly see the breadth   | (2)<br>Engage under-represented and underserved groups |  | Ongoing                          |

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|  |                               |        |                             | and depth of our relationships<br>Assessment: Healthy relationships are established that allow a facilitation of focus groups (see below)   |   |  |     |
| Conduct focus groups with Latinos, African-Americans, and residents with limited or no English | Ryan Livergood / Noreen Reese | Medium | Admin                       | Target Completion Date: 4 <sup>th</sup> quarter, 2018<br>Status: In process of reaching out to community leaders that represent these groups<br>Assessment: review information collected at focus groups with Management Team and create recommendation in response to needs  |   |  | No  |
| Conduct periodic walking tours for new residents   | Diana Sills / Meg Schmaus     | Medium | Youth Services, Circulation | Project Completion Date: 2nd quarter, 2017<br>Status: Complete, began offering over the summer<br>Assessment: Begin offering walking tours at the start of the next fiscal year; explore use of volunteers in this role   | (2)<br>Create new patron orientation experience |  | Yes |
| Explore production of a virtual tour of the library  | Jan Marsh                     | Medium | Admin                       | Target Completion Date: 4 <sup>th</sup> quarter, 2018<br>Status: Youth area virtual tour used in school visit May 2017. Full virtual tour in production. Plans being made to create Spanish-language version as well.<br>Assessment: Management Team will make recommendation regarding the production of a virtual tour of the library |   |  | No  |
| Update our new resident kit, which includes a list of  | Jan Marsh / Meg               | Medium | Admin, Circulation          | Target Completion Date: 3 <sup>rd</sup> quarter, 2018   |   |  | No  |

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| services we offer, a floorplan of the library, and a current newsletter, and distribute one every new cardholder   | Schmaus        |        |   | Status: Almost complete. In final editing stages. Current welcome brochure updated with current board members.<br>Assessment: New resident kits will be available for distribution to every new cardholder  |  |  |             |
|  |                |        |   |   |  |  |             |
| Provide users with more access to charging stations for electronic devices, starting with a portable charger pilot project   | TBD            | Medium | Circulation, IT & Facilities                    | Target Completion Date: 2018 (if funded)<br>Status/Assessment: Upon examination of providing portable charger pilot project, realized that this wouldn't adequately meet patrons needs. There are several solutions we could explore to address but currently no funding. We plan to request a change to the capital plan to move up funding for this project so we can implement sooner.   | (2)<br>Reimagine space, create innovative learning experiences |  | Yes         |
| Computer lab re-imagination: for a multi-use room, investigate adaptation of computer lab into more flexible user space, including addition of technologies/training space | Ryan Livergood | High   | Adult Services, Youth Services, IT & Facilities | Target Completion Date: 4th quarter, 2018 (Done in phases, exploratory phase started 1 <sup>st</sup> quarter of 2017)<br>Status: Adult Services' staff explored options internally in department. Next steps are to discuss with Management Team and also visit other local library spaces for further concept development. Fundraising in progress for space. Final concept to be developed in Fall of 2018 with completion of the project in the Winter of 2018 |  |  | In progress |



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|  |                             |        |   | Assessment: Implement change to the computer lab to optimize its use   |   |  |          |
| Explore the possibility of adding interactive displays, experiences, and space   | Ryan Livergood /Diana Sills | Medium | Admin, Adult Services, Circulation, IT & Facilities, Youth Services | Target Completion Date: ongoing, 2018 (for Coco's Cove)<br>Status: Installation was done in January 2018 to create new interactive space in Coco's Cove<br>Assessment: Executive Director will consult with Management Team twice a year to discuss the feasibility of additional interactive displays and spaces  | (2)<br>Reimagine library space and create innovative learning experiences |  | Complete |
|  |                             |        |   |  |   |  |          |
| Complete an audit of signage across building and property to ensure that service area labeling is also user friendly (e.g., Despite the new mural, staff continues to be asked, "Where is the Youth Services department?") | Jan Marsh                   | Medium | Admin   | Target Completion Date: 4 <sup>th</sup> quarter, 2018<br>Status: Exterior audit phase one underway. Second phase of internal signage audit underway<br>Assessment: Conduct an internal study of our signage; use the study to develop user-friendly signage/labeling and test the new signage with the public; create visual cues using paint, carpet, signage, etc. | (2)<br>Increase brand awareness   |  | No       |
| Establish user-friendly terminology that can be clearly communicated (e.g., Is it the circulation desk or checkout desk?)  | Jan Marsh                   | Medium | All   | Target Completion Date: 3rd quarter, 2018<br>Assessment: Conduct an internal study of the terminology commonly used by WNPL; use the study to develop user-friendly terminology and test the new terminology with the public   |   |  | No       |
| Develop branding guidelines and communicate to staff   | Jan Marsh                   | Medium | Admin   | Target Completion Date: 3rd quarter, 2018  |   |  | No       |

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|   |                           |        |                                     | Status: Samples from other libraries in hand<br>Assessment: create a style guide including graphics guidelines  |  |  |         |
| Add remote book drop in the densely populated western part of the district                                | Noreen Reese              | High   | Admin, IT & Facilities, Circulation | Project Completion Date: 3rd quarter, 2016<br>Status: Complete  | (3)<br>Increase awareness and engagement |  | Yes     |
| Analyze the cost and staffing needs of establishing a WNPL "Pop-up library"                               | TDB                       | Medium | TDB                                 | Project Completion Date: 3rd quarter, 2017<br>Status: Complete, not moving forward with project. Assessment indicated that it would be difficult to establish a formal "Pop-up library" with current resources. Demand does not seem to exist. Better project for a library in a more urban setting<br>Assessment: Completed analysis of "Pop-up library" and recommendation for action |  |  | Yes     |
| Work with our community partners to explore the possibility of community wi-fi spots                      | TDB                       | Medium | TDB                                 | Project Completion Date: 3rd quarter, 2017<br>Status: Complete. Not a priority among community partners to explore this project at this time<br>Assessment: Complete analysis of this project and a recommendation for action   |  |  | Yes     |
|   |                           |        |                                     |   |  |  |         |
| Conduct non-user surveys at community locations (e.g., Jewel-Osco, FitNation, Hunt Club Community Center) | Ryan Livergood, Jan Marsh | High   | Admin                               | Target Completion Date: ongoing<br>Assessment: Engage non-users twice a year at locations throughout the community and  | (3)<br>Engage nonusers                   |  | Ongoing |

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|   |                |        |                        | implement their feedback to attract new users in a cost-effective manner   |                                |  |         |
| Explore the possibility of adding new signage or other promotional opportunities throughout the library district                  | Ryan Livergood | Medium | Admin                  | Target Completion Date: ongoing<br>Status: Several ideas identified to propose in the budget for in FY 2019-2020 (e.g. yard signs, window clings). Solicited ideas from staff using our "Thinking Outside of the Box" Idea Board in Staff Lounge<br>Assessment: Executive Director will consult with Management Team twice a year to discuss the new signage and other promotional opportunities throughout the library district |                                |  | Ongoing |
|   |                |        |                        |  |                                |  |         |
| Explore the feasibility of hosting intergovernmental roundtables to discuss community issues and foster intergovernmental sharing | Ryan Livergood | Medium | Admin                  | Project Completion Date: 1st quarter, 2017<br>Status: Complete, consensus is that our existing quarterly dinner meetings foster intergovernmental sharing<br>Assessment: Contact intergovernmental partners to gauge their interest in this project; if interest is adequate, annually host intergovernmental roundtable events  | (3)<br>Enhance<br>Partnerships |  | Yes     |
| Explore the feasibility of collaborating with schools to launch an experimental trial hotspot lending program                     | Ryan Livergood | High   | Admin, IT & Facilities | Project Completion Date: 3rd quarter, 2017<br>Status: Complete. After meeting with representatives from District 56 over the summer regarding their hotspot lending program, the takeaway is that while their  |                                |  | Yes     |

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|   |                           |        |                        | <p>program is a success, there is not an insatiable demand for these hotspots. I recommend re-examining the feasibility of this project in the future, but due to the cost involved and the fact that this doesn't appear to be as large a need as we initially anticipated, we should not proceed any further on our own at this time</p> <p>Assessment: Complete analysis of this project and a recommendation for action</p>  |                   |  |                                       |
| Partner with local schools to ensure every student has a library card through efforts such as library card sign-up during school registration and library cards being included on school supply lists | Amy Meyer/<br>Meg Schmaus | High   | Admin, IT & Facilities | <p>Target Completion Date: Complete</p> <p>Status: Launched the trial library card sign-up program with District 56 in May; District 50 was very eager to work with us on this after our trial with District 56. 891 sent in the first year of the initiative; we implemented this program with District 50 for their 2018 Kindergarten registration process on March 10.</p> <p>Assessment: Annually review percentage of students in each school district we serve to assess how well we are doing getting students registered with library cards; annually review the percentage of active student library card users</p> |                   |  | First phase: Yes<br>Second phase: Yes |
|   |                           |        |                        |  |                   |  |                                       |
| Conduct public awareness campaign to position WNPL  | Jan Marsh                 | Medium | Admin                  | <p>Target Completion Date: Ongoing</p> <p>Status: Word of Mouth marketing</p>  | (3)<br>Coordinate |  | Ongoing and part of                   |

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| in the minds of residents as the destination for transformation (align with themes such as Libraries Transform and #MTJB – more than just books) |           |        |       | team has focused on themes to maximize exposure. Several successful completed advocacy efforts, including “Dill Pickle for President” and “Treasure Your Library”, among others<br>Assessment: During quarterly engagement of non-users, ask both self-identified library users and non-users if they had heard or were aware of our public awareness campaign | Advocacy efforts |  | our workflow |
| Recruit, train, and deploy patron ambassadors to spread library messages (through word of mouth, social media, etc.)                             | Jan Marsh | Medium | Admin | Target Completion Date: Complete<br>Status: Used local celebrities to promote the Sapphire Cards<br>Assessment: Review the effectiveness of patron ambassadors and evaluate whether or not to try this for other initiatives   |                  |  | Yes          |
| Collaborate with existing partners and local businesses to mount a major library card sign-up drive and increase users                           | TDB       | High   | All   | Target Completion Date: 2019 or later<br>Status: Implementation delayed as project would require resources allocated to other projects this year<br>Assessment: Analyze the number of new users versus the number of current users when the campaign started   |                  |  | No           |

shared/management team/strategic planning process/2018/strategic plan initiatives progress report June 2018 final